



Promote Iceland
Online Audit
November 2016



- 1. Customer and Market Analysis
- 2. Sentiment
- 3. Search Engine Results
- 4. Social Media
- 5. Blogs/Forums/Video
- 6. News and Features
- 7. Suppliers
- 8. Influencers
- 9. Conclusion



This audit has been prepared to analyze the online presence of Icelandic foods, with focus on the following products in the UK, US and Germany:

- Fish (Cod, Shrimp, Trout, Roe, Golden Redfish, Salmon, Haddock, Monkfish, Herring, Arctic Char and Dried seafood)
- Spirits and beer
- Lamb
- Dairy
- Other food products (barley, sweets, organic, etc)

This audit was put together in November 2016 and pulls information from: social media (Facebook, Instagram, Twitter and Youtube), blogs and forums, news and media sites. This information was gathered using a variety of sentiment, data analysis and social media tools, including **Crimson Hexagon**, **Mention**, **Trackur** and **Google Trends**. Information was also gathered from a number of sources, listed below.

We are Social Digital Year Book **Wireless Week Marketing Land Ericsson Trend Report** Trendwatching Report (2016 and 2017) **Deloitte Retail Trends Report 2016 Deloitte Consumer Trends in Food Industry** Handshake - Food Industry Trends 2016 **Global Food Forums CNBC** Organic Trade Association **Agricultural Marketing Resource Centre Financial Times Think With Google Ein Herz Fuer Bio Deloitte Navigating the Digital Divide Nielsen The Future of Grocery Organic Data Network Bioimporte AMI Informiert**

CUSTOMER AND MARKET ANALYSIS

MARKETING AND CONSUMER TRENDS GLOBALLY 2016/2017



CONSUMERS WHO CARE

Consumers are more aware of the ethical, environmental and social impact of their buying habits. They will actively look for brands which communicate their environmental and ethical credentials.



VIDEO

By 2018 69% of total internat traffic will be video. Currently over 50% of all video is consumed on mobile devices. Consumers are increasingly expecting to consume content via video.



PERSONALISATION AND SEGMENTATION

Audiences want to be spoken to directly, and data makes it possible to understand what they want and to personalise communications to give them something relevant that adds value.



INTERACTIVE AND USER GENERATED CONTENT

Consumers want to be involved in brand campaigns (less passive & more engaged). Use and share customer experiences as content. Let your target audience market your brand for you.



OMNICHANNEL

Omnichannel marketing experiences will begin to emerge as brands connect physical locations, desktop, mobile, and other devices into one cohesive brand experience.



STREAMLINING WITH DIGITAL

Consumers using digital (apps and social media) to streamline and increase efficiency. They get reviews on products via friends on social, or use apps to look for recipes and DIYs.



CONTENT REMARKETING

Content remarketing is the process of tagging visitors on your site and retargeting them with additional content after they leave.



STORYTELLING

Storytelling allows you to communicate with your target market in an engaging and entertaining way. Consumers have been romanced by product origin, ingredients or inspiration stories.



ALWAYS MOBILE

Consumers are always mobile. 65% of all online content is now consumed on mobile devices and Google reports that dual device use is also on the rise.

KEY INFORMATION TO TAKE AWAY

Consumer behaviour is becoming more sophisticated online and they expect content which is tailored to their unique interests and lifestyles. This content needs to be well crafted and tell the story of the brand or products in an emotive and interesting way. Reaching the audience on the right platform, at the right time and in the right format is extremely important.

CUSTOMER AND MARKET ANALYSIS

DIFFERENCE IN MARKETS UNITED STATES | UNITED KINGDOM | GERMANY







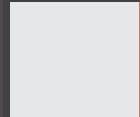




INTERNET **USERS** 282.1 MILLION



SOCIAL MEDIA USERS 282.1 MILLION



U.S. recipe consumers are more engaged on

DESKTOPS





INTERNET **USERS** 59.47 MILLION



SOCIAL MEDIA USERS 38.00 MILLION



U.K. recipe consumers are more engaged on

SMART PHONES



POPULATION



INTERNET **USERS** 71.73 MILLION



MEDIA USERS 29.00 MILLION



German consumers find recipes via

BLOGS on a variety of devices

Most talked about subjects:

CELEBRITIES CRIME FOOTBALL NUTRITION



Most talked about subjects:

SOCCER CRIME CELEBRITIES AUTO NUTRITION



Most talked about subjects:

SOCCER **CELEBRITIES TECH AUTO BEAUTY**



German audiences are less active on social media compared to U.S. and U.K. They are also more focused on facts, figures and the quality of products. Germans prefer to read content written by German speakers, and respond to traditional PR more than brand content.

KEY INFORMATION TO TAKE AWAY

While the U.S. and U.K. markets are quite similar, the German market differs considerably in terms of content consumption and brand trust. Brand content works well with the U.S. and U.K. markets, but the German market should be approached with an influencer strategy and a strong focus on the quality of the products.





ORGANIC FOODS

Organic is the fastest growing sector of the global food industry. Organic food sales increase by double digits annually.



'ETHNIC FOODS', ARTISAN AND SPECIALITY FOODS

Consumers are moving away from the staples that they grew up with and embracing the new tastes and flavours of specialty food from across the world.



ALL NATURAL INGREDIENTS

Consumer demands for natural and 'less processed' food and drink are forcing companies to remove artificial ingredients.



FOOD ON SOCIAL MEDIA

The rise of food-centric media has sparked new interest in cooking, not only for the sake of nourishment, but for the purposes of sharing one's creations via social media.



HEALTHY SNACKS

There is a growing preference for products that provide more healthful options than typical snacks. Protein, bite-sized snacks, and innovative flavours are in high demand.



ALTERNATIVE PROTEIN

Lesser-known meat and seafood options are making their way from restaurant menus and local obscurity into mainstream kitchens.



ONLINE SALES

Online food sales have increased globally, with more than half of sales going to speciality foods that can't be sourced in local grocery stores.



CHANGING TASTES AT BREAKFAST

There is a shift away from carb-filled, cold breakfast cereals and toward healthier, protein-rich breakfast options like yogurt and oats.



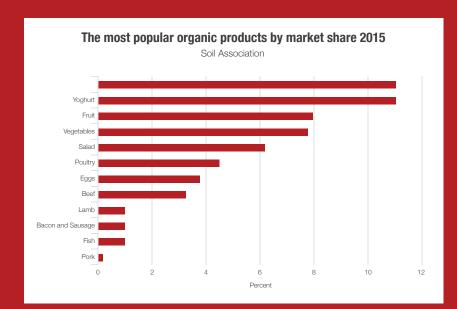
NUTRITION AND HEALTH ADVICE FROM BLOGS

Consumers are going to blogs for diet advice. Dietitians are reporting that the topic of nutrition and health is booming on blogs and websites.

KEY INFORMATION TO TAKE AWAY

Current food trends favour Icelandic products with organic, quality health products being extremely popular. The focus is also on more interesting, exotic ingredients and recipes, especially for those who share their food experiences online. Influencer marketing and emotive storytelling will work extremely well.

CUSTOMER AND MARKET ANALYSIS ORGANIC FOOD TRENDS GLOBALLY 2016



Consumers seek fresh, natural and minimally processed foods. Beneficial ingredients that help fight disease and promote good health are also important.

78% of US families are buying organic

Millennial parents are choosing organic more than any other generation.

Health attributes are most important to emerging-market respondents, who are also most willing to pay a premium for health benefits.

3% of all fruit and vegetable sales are organic.

65% of consumers express the most desire for foods with organic ingredients.

Organic is present in over 75% of all categories on supermarket shelves.



The Top 5 Countries with the Largest Markets for Organic Foods (2015 global figues)

1	United States	€45.1 billion
2	Germany	€8.6 billion
3	France	€5.8 billion
4	Canada	€4.6 billion
5	United Kingdom	£2.3 hillion

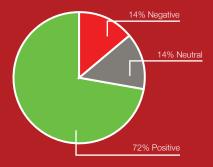
KEY INFORMATION TO TAKE AWAY

Demand for organic food grows year on year, especially in the US, Germany and UK. While millennials want food to be convenient, they are also more willing to pay for fresh and healthy food, and are willing to go to great lengths to find it. Power is shifting from large mass market companies and brands to "the little guy" selling online or at speciality stores.

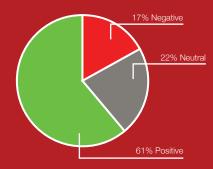
SENTIMENT ANALYSIS

SENTIMENT ANALYSIS ON ICELANDIC FOOD PRODUCTS ONLINE

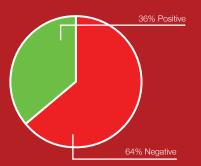
Icelandic food



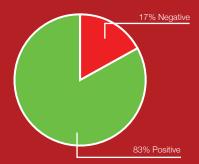
Icelandic lamb



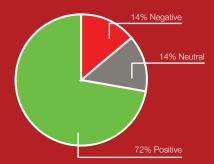
Icelandic traditional food



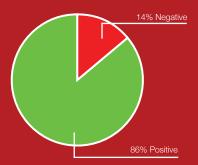
Icelandic fish



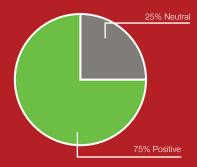
Icelandic recipes



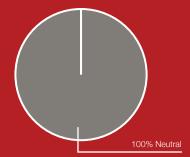
Icelandic skyr



Icelandic products



Icelandic beer



What is this information?

This is sentiment analysis based on the search terms across the entire web.

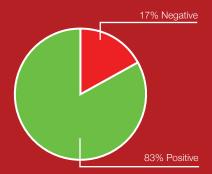
There is not enough data to pull sentiment on 'icelandic dairy', so this has been replaced with sentiment analysis on 'skyr'.

KEY INFORMATION TO TAKE AWAY

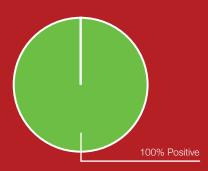
General sentiment online is very positive, with the exception of 'icelandic traditional foods', which remains mostly negative. In terms of actual products, the sentiment is positive, with some negativity coming from the recent fishing strike and people unable to find icelandic products in their local stores (skyr and lamb).



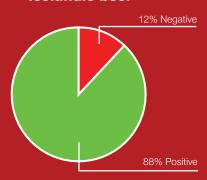
Social sentiment analysis for icelandic food



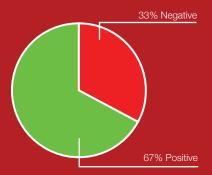
Social sentiment analysis for icelandic cusine



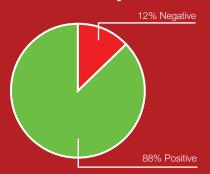
Social sentiment analysis for icelandic beer



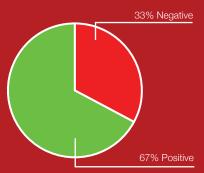
Social sentiment analysis for icelandic fish



Social sentiment analysis for icelandic skyr



Social sentiment analysis for icelandic lamb

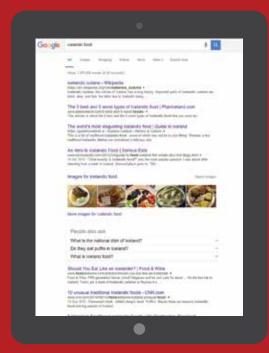


KEY INFORMATION TO TAKE AWAY

While sentiment on social media appears mixed across certain keywords, these are instances of supply issues and the recent fishing strike skewing numbers. Sentiment around Icelandic food, products and cuisine is generally very positive across social media. This positive sentiment comes from food bloggers, amatuer 'foodies' and travellers to the region.

SEARCH ENGINE RESULTS

GLOBAL SEARCH ENGINE RESULTS 2016



There are 774,000 results for the search term 'lcelandic food', 650,000 for 'eat like an Icelander' and 537,000 for 'lcelandic recipe'.

These results broadly fall into 4 categories:

- Unusual Icelandic dishes
- Food/place to eat whilst in Iceland
- Icelandic recipes
- Functional results*

Nearly half of the first 10 search results on Google could be seen as negative - relating to the 'most disgusting', 'most unusual', 'worst' and 'weirdest' lcelandic dishes.

Currently there are a total of **528** backlinks from other sites connecting to www.promoteiceland.is

*Functional results typically include pages listed by service providers such as Expedia, Thomas Cook, review sites such as TripAdvisor and reviews for Icelandic cookery books.

FISH AND SEAFOOD

662,000 results for 'Icelandic fish'

672,000 for 'Responsible fishing Iceland'

485,000 for 'Icelandic cod'

424,000 results for 'Icelandic lobster' and 441,000 for 'Icelandic sole'

This is compared to 928,000,000 and 420,000,000 results for the general terms 'fish' and 'cod'

LAMB

496,000 results for 'Icelandic lamb'

295,000 results for 'Icelandic sheep'

This is compared to 166,000,000 results for the term 'lamb' across all regions

DAIRY

1,860,000 results for 'skyr'

437,000 for 'Icelandic dairy'

97,300 results for competitor 'Arla Skyr'

This is compared to 201,000,000 results for the term 'dairy' across all regions

SPIRITS AND BEER

555,000 results for 'Icelandic beer', with 122,000 results for 'Einstok beer'

527,000 results for 'Icelandic spirits' with 135,000 results for 'Reyka vodka'

539,000 for 'Icelandic alcohol' with 113,000 for 'Icelandic liqueur'

This is compared to 22,000,000 results for the term 'spirits and beers' across all regions

OTHER

363,000 for 'Icelandic tomatoes'

276,000 for 'Icelandic sea salt'

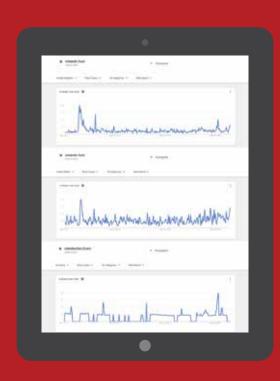
608,000 for 'Icelandic chocolate' and 468,000 for 'Icelandic jam'

368,000 for 'Icelandic bottled water'

368.000 for 'Icelandic barley' and 642,000 for 'Icelandic tea'

SEARCH ENGINE RESULTS

SEARCH TRENDS 2016 UNITED STATES | UNITED KINGDOM | GERMANY



Different markets

In the UK interest in Icelandic cuisine has remained relatively stable over time, with the UK's interest peaking in 2010 and starting to rise again this year.

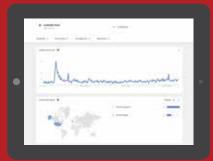
US interest peaked in 2012, and has started to show a slight increase in 2016.

German search trends for these keywords are very sporadic.

All search terms relating to Iceland peaked in July 2016 when Iceland beat the UK in a shock victory during Euro 2016.

Icelandic cuisine, Icelandic dishes, Traditional Icelandic food, Icelandic diet, Iceland traditional food, Icelandic breakfast, icelandic food culture, icelandic desserts, Icelandic lamb, Icelandic lamb recipes, Icelandic recipes, Icelandic spirits, Icelandic alcohol, beer in Icelandic language, Iceland Einstok beer, gull beer, Icelandic beer, Icelandic beer viking, Skyr health benefits, Skyr ingredients, Skyr nutrition, how to make Skyr, Skyr yogurt where to buy, Skyr vs greek yogurt, Skyr recipe, Icelandic fish, where to buy Icelandic cod, Icelandic cod recipes, Icelandic fishing, cod liver oil, Icelandic cod sustainable

SEARCH ENGINE RESULTS SEARCH TRENDS GLOBALLY 2016



Icelandic food

Related gueries and topics:

- iceland food, iceland, icelandic clothing, traditional icelandic food, reykjavik, icelandic food recipes, typical icelandic food

Main areas:

- London
- New York, California



Icelandic fish

Related queries and topics:

- icelandic fish stew, icelandic fish oil, icelandic wolf fish, fish soup, haddock, reykjavik, fermented fish, hakarl

Main areas:

- Alaska
- New York, California



Icelandic lamb

Related queries and topics:

- Icelandic lamb soup, grass fed lamb, organic lamb

Main areas:

- Not enough data pulled



Icelandic recipes

Related gueries and topics:

- Icelandic food, icelandic food recipes, slow cooker, lamb and mutton dishes, skyr

Main areas:

- Not enough data pulled





Facebook













Facebook











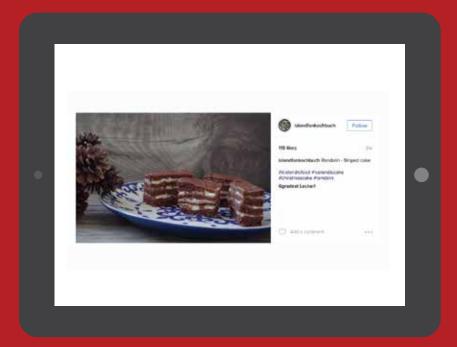








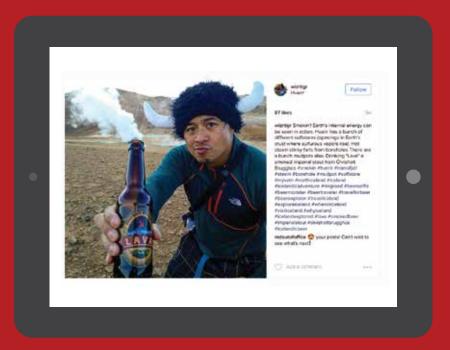


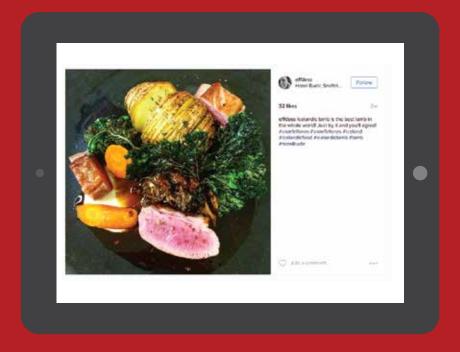






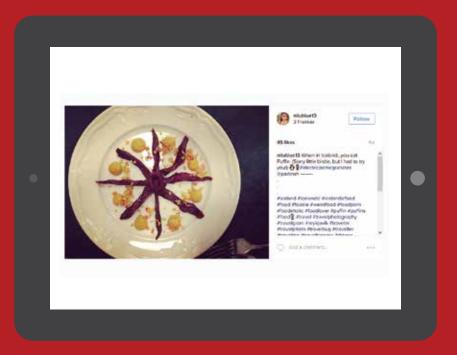
















































Icelandic Lamb

https://www.facebook .com/icelandiclamb/

Facebook: 1145 Twitter: na Instagram: na



Icelandic Glacial

https://www.facebook .com/lcelandicGlacial/ ?ref=br rs

Facebook: 81543 Twitter: 6998 Instagram: 7317



Inspired by Iceland

https://www.facebook.com/inspiredbyiceland

Facebook: 157940 Twitter: 38700 Instagram: 57100



Einstok

https://www.facebook .com/Einstok/?ref=br _rs

Facebook: 13588 Twitter: 3555 Instagram: 12800



Skyr

https://www.facebook .com/Skyr-Icelands-s ecret-to-healthy-living -100304546707352/

Facebook: 10139 Twitter: 988 Instagram: 698



LYSI

https://www.facebook .com/LysiHf/?hc_ref= SEARCH&fref=nf

Facebook: 5305 Twitter: na Instagram: na

KEY INFORMATION TO TAKE AWAY

Most Icelandic brands and products have large and devoted followings online. Their branding tends towards 'cool' and 'edgy' in order to appeal to a niche, more adventurous market.







There are roughly 42,000 blog posts mentioning lcelandic food across various platforms.

Wordpress and Tumblr are the two platforms with the greatest number of mentions, with more than 70% of the mentions on Wordpress.

A clear majority (around 60%) of these blogs focus on people's experiences visiting Iceland rather than specifically on Icelandic food and products.

Skyr is by far the most mentioned product/ food type. Mentions often relate to health/ diet/ recipes. Competitor Arla Skyr features regularly but does not dominate the blogs.

Several high profile bloggers (with more than 15,000+daily page views) have mentioned Icelandic food produce, including Roads and Kingdoms and 1day1kid.

There is a clear divide between bloggers who live in Iceland, bloggers who are visiting and those promoting Icelandic recipes for health/food interest reasons.

KEY INFORMATION TO TAKE AWAY

A focus for influencer marketing using bloggers should be around bringing Icelandic products into the home and 'eating like an Icelander'. This content can push a health message while promoting more adventurous eating.





FISH AND SEAFOOD

32,000 Youtube videos covering fishing in Iceland.

Many of these videos look at the process of fishing and learning more about where your seafood comes from.

LAMB

10,100 Youtube videos covering 'Icelandic lamb'

This covers a range of things including a large number of videos of Icelandic sheep in the fields, and 'shock' videos showing users eating sheep's head.

A small number of results cover Icelandic lamb recipes.'

DAIRY

13,500 Youtube videos tagged skyr.

This includes videos of skyr being made, several adverts by competitor Arla Skyr, and even a video showing a tub of lcelandic skyr meeting an 'uncouth' tub of Arla Skyr

The majority of user generated videos are either 'taste tests' or recipe walkthroughs.

SPIRITS AND BEER

14,100 Youtube results for 'Icelandic beer'

A huge majority of these are 'taste test' videos with presenters talking through the beers.

Most of these videos only have a small number of views. These are mostly created by specialist ale and beer video channels.

OTHER

71,300 Youtube results about Icelandic food and products.

The top 5 videos for this search term are all on the theme of taste tests/ trying Icelandic food.

The 10 videos that come up on Youtube for 'Icelandic food' cover:

- -A food tour of Iceland
- -Making Icelandic food at home
- -'Weird' food

KEY INFORMATION TO TAKE AWAY

While there is plenty of content on Youtube covering eating in Iceland and where the products come from, there is a space for creating content around using Icelandic ingredients at home and trying Icelandic recipes.

NEWS AND FEATURES PRESENCE IN NEWS AND FEATURES CONTENT 2016



Recent news coverage about Iceland's food industry:

Iceland sustainability list - September 2016

Iceland was listed as the healthiest country to live in a study released by the United Nations. This was featured across a selection of nationals including: The Mirror, Business Insider and the Daily Mail

Iceland versus Iceland - September 2016

Recently Iceland received a large amount of coverage for the legal issues with the name of the shop Iceland. This was covered across national media including: The Telegraph, The Times, The Express, BBC News, The Mirror, the Daily Mail, Sky News, ITV News, The Metro, The Financial Times, The Drum and City AM, among others.

Shortage of Icelandic cows - July 2015

There has also been coverage of the need for more Icelandic cows to meet skyr demand. This includes coverage in Munchies (Vice) and NPR

The predominant topics in the media are:

- -Travelling to Iceland (what to eat) 40% (coverage across The Independent, Telegraph, World Nomads, CNN Traveller, etc.)
- -Skyr is the healthiest yogurt 40%
- -Unusual Icelandic food 20%

PUBLICATION	DATE	TOPIC	MENTION
CNN feature	Sept 2016	Unusual Icelandic Food	Mentions Icelandic spirit Brennevin, Skyr.is and others
BBC Radio 4	March 2016	Skyr	Mentions traditional Icelandic Skyr
Yahoo	June 2016	Unusual Icelandic Food	No specific brand mentioned
Daily Mail	June 2016	Healthiest Yoghurt	Mention and pic of Skyr.is
Huffington Post	May 2016	Healthiest Yoghurt	Competitor Siggi's used both as example and picture
Telegraph	Jan 2016	Eating Icelandic	Mentions Icelandic lamb and fish, highlighting all the best produce and what to make with it







Wholefoods

- blog content covering skyr, arctic char, cod and lamb. Articles cover the quality of the quality of the products and what sets Icelandic products apart from their competitors.
- recipes for char, lamb and skyr dishes

Wholefoods stock lamb, cod, char and skyr.

Other suppliers like Walmart and Kroger have no content on Icelandic products.





Waitrose

- blog content covering the source of their fish, animal welfare and Christmas traditions around the world
- recipe for sweet chilli cod
- video on the making of 'thunderbread'

Waitrose stock skyr and cod.

Other suppliers like Tesco, Sainsbury's, M&S and Asda have no content on Icelandic products.

KEY INFORMATION TO TAKE AWAY

Suppliers already have vast communities, and there is currently very little content around Icelandic products being created and shared by these big retailers.







Hungry Healthy Happy - UK

www.hungryhealthyhappy.com/

Topics/themes:

Healthy eating, fitness and wellbeing, travel, family, home and garden.

Facebook: 73.5k followers **Twitter:** 33.1k followers **Instagram:** 34.1k followers **Pinterest:** 25.3k followers

Followed by:

Bounce Energy Balls, teapigs, Boots, Twinings, Meridian Foods, delicious.magazine, Skyr UK, National Trust, Nakd Wholefoods.



Elizabeth's Kitchen Diary - UK

www.elizabethskitchendiary.co.uk/

Topics/themes:

Healthy food, fitness, crafts, travel.

Facebook: 5k followers Twitter: 7k followers Instagram: 7k followers Pinterest: 3k followers

Followed by:

Skyr UK, Bounce Energy Balls, delicious.magazine







Skinny Taste - United States

www.skinnytaste.com/

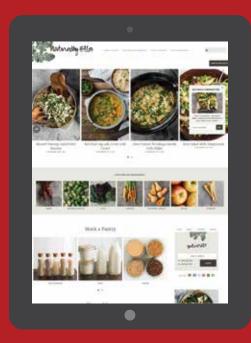
Topics/themes:

Healthy/seasonal/whole foods.

Facebook: 3m followers Twitter: 44.1k followers Instagram: 474k followers Pinterest: 1.1m followers

Followed by:

WeightWatchers



Naturally Ella - United States

naturallyella.com/

Topics/themes:

Healthy food, recipes, natural food

Facebook: 29.8k followers **Twitter:** 7k followers **Instagram:** 66.8k followers **Pinterest:** 42.5k followers

Followed by:

Skyr UK, Bounce Energy Balls, delicious.magazine







Ina Is (s) t - Germany

http://inaisst.blogspot.co.uk/

Topics/themes:

Seasonal food, budget cooking.

Facebook: 7.5k followers

Twitter: n/a

Instagram: 3.4k followers **Pinterest:** 160 followers

2016 Food Blog Award Winner



Individualisten - Germany

http://www.individualisten.at/

Topics/themes:

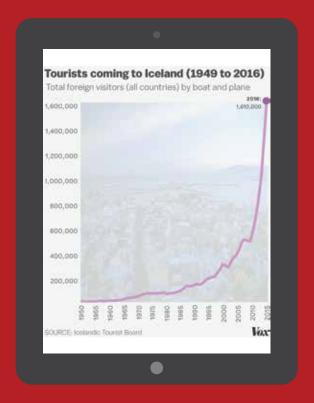
Sugar-free, health, sustainability, seasonal foods, organic foods, eating for allergies, superfoods, fitness.

Facebook: 1.2k followers Twitter: 225 followers Instagram: 1k followers Pinterest: 200 followers

2016 Food Blog Award Winner



Until the early 1980s, the number of foreign visitors to Iceland increased slowly and erratically. At the turn of the century, the annual number of visitors started to increase dramatically. The sharp rise in visitors has increased interest in the culture in general.



Consumers respond to:

- storytelling and emotive content which speaks to their values and lifestyle
- the right content at the right time, which is optimised for their device
- campaigns and content which they can be involved in
- unique, interesting content with a strong visual element

Food trends globally favour Icelandic products:

- healthy, additive free and unprocessed foods are extremely popular, with demand for organic products increasing year on year
- consumers are more adventurous and are looking for niche products and exotic dishes
- the quality of products is becoming more important to consumers, along with ethical and environmental concerns over food sources and sustainability.
- the 'foodie' culture continues to grow online, with users sharing their food journeys and dishes with large and active communities globally



The keys to a successful content strategy



Concept: What is the brand all about?

Channels: Which platforms should you use?

Content: What kind of content should you create?

Connections: How will we be sure that people see and connect with this content?

CONCEPT

Using emotive messaging to promote Icelandic products by pushing the story of where they are produced and the people that produce them, along with the quality and uniqueness of the products.

CHANNELS

- Social Media (Facebook, Twitter, Instagram and Youtube)
- The Promote Iceland blog
- Influencer channels (food bloggers, nutrition/health blogs, lifestyle sites)
- Big retailers and smaller, more niche suppliers (websites and social media)

CONTENT

- Visual (infographics, mini infographics, gifographics, social posts)
- Blog posts and articles
- Video (longer and micro)
- User generated content

CONNECTIONS

- content retargeting (using promoted content and remarketing to lead users along a content journey)
- influencer marketing (using influential content creators to create content using Icelandic products and distribute it to their niche audience)
- uninterrupted native advertising (online media channels which enable brands to reach consumers within the flow of editorial on leading publishers' websites)
- using existing suppliers / retailer platforms