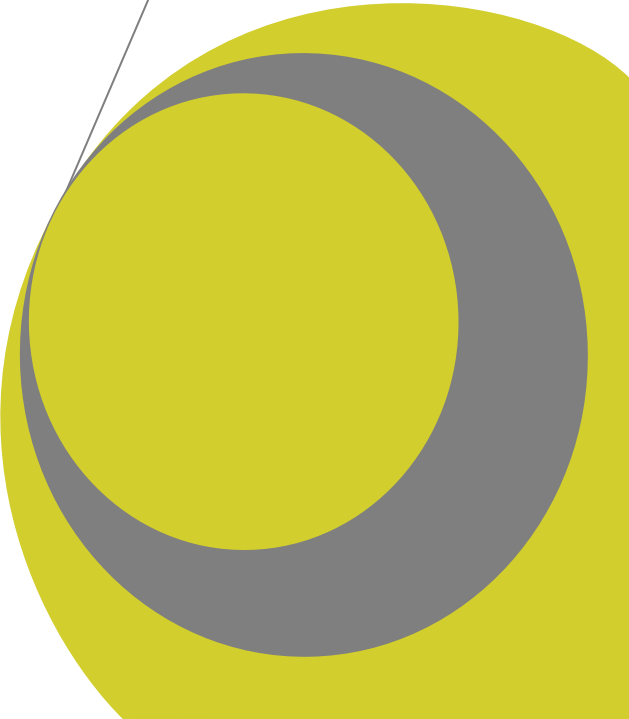


**FOOD & DRINK CONSUMER INSIGHTS SERVICE
EVALUATION – FINAL**



26th March 2026



FOOD & DRINK CONSUMER INSIGHTS SERVICE

EVALUATION

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List of Abbreviations

Abbreviation	Definition
AHDB	Agriculture and Horticulture Development Board
AI	Artificial Intelligence
BIC	Business Information Centre
BMA	Belfast Metropolitan Area
CAFRE	College of Agriculture, Food and Rural Enterprise
CI	Consumer Insights
DAERA	Department of Agriculture, Environment and Rural Affairs
DfE	Department for the Economy
DPG	Data Purchase Grant
EAM	Economic Appraisal Methodology
EPD	Existing Product Development
FBD	Food Business Development
FBDT	Food Business Development Team
FDCI	Food and Drink Consumer Insights
FSA	Food Standards Agency
FTE	Full Time Equivalent
FY	Financial Year
GB	Great Britain
GTI	Growth through Insights
GVA	Gross Value Added
Invest NI	Invest Northern Ireland
IWSR	International Wine and Spirits Record
KPI	Key Performance Indicator
LEO	Local Enterprise Office
MI	Market Intelligence
NI	Northern Ireland
NIGEAE	Northern Ireland Guide to Expenditure Appraisal and Evaluation
NPD	New Product Development
NWRC	North West Regional College
OOH	Out of Home
PPE	Post Project Evaluation
QUB	Queen's University Belfast
R&D	Research and Development
ROI	Republic of Ireland
SFA	Selective Financial Assistance
SMART	Specific, Measurable, Achievable, Realistic and Time-bound
SME	Small and Medium-sized Enterprise
TFP	The Food People
ToR	Terms of Reference
TPO	Third Party Organisations
UK	United Kingdom
UPF	Ultra-Processed Foods
US	United States
UU	Ulster University
WBMF	Who Buys My Food

1. INTRODUCTION AND BACKGROUND

1.1 Introduction

Invest Northern Ireland (Invest NI) has commissioned Cogent Management Consulting LLP (Cogent) to undertake an independent evaluation of its Food and Drink Consumer Insights Service ('FDCI Service' hereinafter) covering the period 01 April 2019 – 31 March 2025, and subject to the findings of the evaluation, an HMT 5 Case Model Business Case.

It is envisaged that the findings and recommendations presented in this evaluation report will inform the Business Case. The Terms of Reference (ToR) for the project advise that the Business Case should consider opportunities for the rationalisation and/or alignment of the Service and its delivery mechanisms to enhance its effectiveness and efficiency. The Business Case will also consider how the FDCI Service should align with the Department for the Economy's Economic Vision and the outcomes of the Invest NI Independent Review.

The ToR advises that the main purpose of the assignment is to **establish the impact the service is having on the performance of the NI food & drink industry in terms of innovation and external sales**. It is also envisaged that the evaluation will:

- Assess the value for money offered by the FDCI Service.
- Develop a return on investment ratio.

The full objectives for the evaluation are set out in Appendix I.

1.2 The FDCI Service

1.2.1 Overview

The FDCI Service was established in November 2018.¹ The Terms of Reference advise that its purpose is to promote, embed and enable **the strategic use of data and insight to stimulate innovation and drive the growth and competitiveness** of NI's food & drink industry.²

To that end, the FDCI Team **identifies and procures a variety of consumer, retail, and market data** to support business development, marketing, and new product development initiatives through a series of offerings that are provided on either a one-to-one or one-to-many basis.

The market data procured seeks to ensure coverage of different data sources for different strategic purposes, e.g. data for market sizing, growth trends, shopper demographics per retailer and per category, and global food trends for inspiration for innovation. It encompasses retail and foodservice, UK and Ireland, EPOS data, Panel data, Loyalty Card, market/sector trends and a primary research tool for testing new products and marketing concepts. It is envisaged that this will provide a holistic depth of understanding of key macro trends and consumer insights across all food and drink industry subsectors

¹ However, it should be noted that whilst it was not branded as the FDCI Service, Invest NI has historically provided similar market intelligence offerings to its food and drink sector clients through its Business Information Centre. Indeed, several of the case studies received predate by several years (e.g. 2009 for Provenance Salads) the launch of the FDCI Service and relate to, for example, clients receiving support from the Dunnhumby Why Buys My Food? Programme.

² The ToR notes that encouraging innovation and new product development in NI's food and drink sector provides a strong strategic fit with the recommendations of the Independent Strategic Review of the NI Agri-Food Sector 2022. It notes that that review states: *"We see a need for intervention in developing greater awareness of market intelligence (provided by the likes of Euromonitor, IGD, Kantar and Mintel) among start-ups and SMEs. This will help them tailor their selling and marketing strategies more effectively. Invest NI's Food and Drink Division is actively working on this through its Consumer Insights team, but we would recommend a review of Invest NI's market intelligence and consumer insights capacity, to ensure that it is adequately resourced and ready to lead NI agri-food in this direction, particularly given the pressing need to look beyond GB for future sales growth."*

to meet the needs of Invest NI's client portfolio.

Nonetheless, the FDCI Team notes that it is likely that businesses that are working on projects that require greater data granularity will need to purchase more specific market data. Consequently, the FDCI team offers access to a data purchase grant (DPG), which it describes as being available *“to provide a stimulus for first-time data procurement”*.³

As well as Invest NI clients and other wider business base beneficiaries, the FDCI team notes that the data procured is used by the Invest NI food business development team and the sector client team to assist in the appraisal and evaluation of projects and to keep them fully up to date with current food and drink trends.

Alongside the procurement of market reports and data, the FDCI Team states that it is developing a toolkit of products and services that provides market intelligence across all sectors, categories, channels, and key external markets.⁴

Whilst it considers that its service offerings are comprehensive, the FDCI Team notes that it requires constant refreshing to meet the fast-moving developments in the retail and foodservice sectors and the changing needs of NI food and drink businesses.

Invest NI advises that a need for the Service was identified due to an increasing expectation amongst retail and foodservice buyers that food and drink suppliers would validate their listing and growth proposals with market research and shopper data. It also notes that syndicated market research and shopper data have become more widely available due to increased use of supermarket retailer loyalty cards and specialist data companies operating consumer panels to capture purchasing behaviour and sentiment.

Invest NI notes also that other economic development agencies in Great Britain and Ireland offer food and drink insights services, suggesting that it is consequently important that NI's Food and Drink industry is similarly supported.⁵

The Terms of Reference advise that at the time of its launch, the Service was largely delivered on a one-to-one basis for Invest NI growth account clients following a referral from their respective Client Executive. However, the scope of activity has since expanded to include:

- A monthly market intelligence clinic held in various colleges (e.g. Loughry College, NWRC, SRC, Belfast Met). This aims to support Invest NI's efforts to reach and **support NI's wider business base**, including start-up and early-stage businesses.
- A weekly Market Intelligence Centre service in Invest NI's headquarters, where businesses can undertake their own research guided by a specialist client officer. Online meetings can also be facilitated to ensure full accessibility. This service is also open to the wider business base.
- A data purchase grant was introduced to support businesses with more specific data requirements.
- An events programme including webinars, workshops and an annual conference.
- An 'Insights Hub' was introduced in May 2023.
- An 'Insights Academy', which comprises the flagship Growth through Insights programme.

An overview of the FDCI Team's main service offerings is provided below:

³ Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024

⁴ Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024

⁵ Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024

Insights one2one	This support utilises data drawn from the (purchased) syndicated food and drink sector market reports and market data to support individual businesses with their new product development (NPD) or business development plans. The Insights One2One service provides support to clients via:⁶ • Requests for Development Service (RDSs) wherein an Invest NI Client Manager might identify a need for market intelligence to support their client's investment projects, innovation and R&D projects or market opportunities. Alternatively, businesses might contact the FDCI Team directly, seeking market information to support their growth endeavours. In those situations, the FDCI Team will seek endorsement from the respective Invest NI Client Managers before engaging.⁷ • Market Intelligence Clinics – These are one-day clinics held in regional locations where typically the FDCI Team will aim to meet on a one-to-one basis with five non-Invest NI client businesses (typically aspiring entrepreneurs or early-stage businesses). • Exhibitions and programmes – Businesses that exhibit on Invest NI stands at exhibitions in GB and Ireland are provided with market information to support their exhibition objectives. Similarly, businesses that participate in Invest NI capability development programmes are also provided with such information to support their growth objectives. • FDCI Market Intelligence Centre Visits - The Centre is located in the Library Room (ground floor of Invest NI's Bedford Square headquarters) and is open for appointments every Wednesday so that businesses undertake their own research using the FDCI data toolkit under the guidance of the FDCI team Client Officers. • Data Purchase Grants (DPGs) – This offers grant support to businesses to purchase specific data that cannot be accessed through the data toolkit. The FDCI Team advise that its purpose is to provide a stimulus for eligible businesses to engage in '<i>first-time data procurement</i>'. However, businesses can receive up to £10,000 on three separate occasions up to a maximum of £30,000. It should be noted that the various data providers issue licences to Invest NI, and sharing restrictions are in place based on the percentage of reports that can be shared and to whom. These vary according to the data provider and how the contracts are negotiated. The FDCI Team considers that if the Insights one2one service did not exist, each business that wished to access the data would instead have to visit Invest NI's headquarters to use the platforms. It considers that this would not be practical given the volume of businesses and projects supported. Consequently, the FDCI Team considers that it is more efficient for it to undertake the research on behalf of businesses on a project-by-project basis and then, by exception, businesses can visit the 'FDCI Market Intelligence Centre' to undertake their own supervised research on the platforms. Such visits allow businesses to access and read the full market reports held by Invest NI, but not take away anything other than the agreed sharing limits.⁸
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⁶ Invest NI Business Case for the FDCI Service 2025/26, 1st May 2025

⁷ NB The FDCI Team advises that the successful delivery of RDS support is also partially dependent on Invest NI's Business Information Centre. It states that whilst the FDCI Team procures specialist data platforms, delivery of RDS support is also dependent on the BIC having procured more general market research platforms like Mintel and Euromonitor which complement a holistic approach to the use of data and insights that the FDCI Team promotes. RDS activity is also dependent on the receipt of referrals from Invest NI client teams including Food & Drink Division, Scaling team, Regional Business Group and Business Support Team. Source: Invest NI Business Case for the FDCI Service 2025/26, 1st May 2025.

⁸ Invest NI Business Case for the FDCI Service 2025/26, 1st May 2025

Insights Events	This support utilises data drawn from the (purchased) syndicated food and drink sector market reports and market data, alongside additional support from Invest NI's data partner contracts to deliver events for NI's food & drink industry. Typically, this will provide attendees with information on macro trends and sectoral and channel insights. This strand of activity includes an annual conference, workshops and webinars.⁹ The FDCI Team considers that the events programme serves to broaden the reach of the information available through the data partners and to service the wider business base to impart category data and insights. Workshops are considered to offer an opportunity to delve more deeply into a particular category and to facilitate questions and answers and post-presentation discussions, whilst also providing opportunities for networking and collaboration. The speakers and contributors to the events and workshops are typically sourced from the organisations that the FDCI Team has been working in partnership with, and from industry conferences, exhibitions and webinars that the team has attended. The presentations and slide decks are subsequently hosted on the Insights Hub post-event (see below) and, therefore, accessible (following registration on the Hub) to all food and drink businesses.¹⁰
Insights Hub¹¹	This strand of support provides an online portal (housed on the Invest NI corporate website) that businesses can use on a 'self-serve' basis. It provides access to information on market trends and consumer intelligence through reports, presentations, recordings of events, and bespoke content curated by Invest NI's staff and data partners. It was developed in collaboration with Invest NI's Digital Communications team, which provides support to the FDCI team in terms of user registration management and uploading of new content. It was launched in April 2023 as a repository for the video recordings and slide decks from events delivered as part of the FDCI Service, and other content from Invest NI's data partners, with their permission to share. There are also some training materials that businesses can use in relation to category management. Also, case studies have been developed with some client companies to raise awareness of the FDCI service and to demonstrate the value of using data and insight to grow businesses. It is envisaged that it also serves to widen Invest NI's reach throughout the broader base of NI's food & drink industry. That is, whilst the Hub is only accessible to verified NI food and drink companies, it is not restricted to Invest NI Clients, so it can be used by the wider food and drink business base. It is not available to consultants or third-party organisations at the request of Invest NI's data partners. After each FDCI event, the videos and slide decks are posted on the hub to drive engagement and make the content readily available for participants to reference again.

⁹ NB The FDCI Team advises that the successful delivery of its Events Programme is dependent on Invest NI Communications and Digital Communications teams for the communication and delivery of the Events programme and for raising awareness of the FDCI service.

¹⁰ Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024.

¹¹ <https://www.investni.com/support-for-business/insights-hub>

Insights Academy	This support seeks to improve businesses' capability to interpret and utilise data and insights to drive growth and competitiveness. According to the FDCI Team, the use of granular market, consumer and retailer data is new to many SMEs, and they generally find the information interesting to know, but do not know how to turn it into actionable insight that will drive business growth. Hence, the need for specialist skills development. The Insights Academy encompasses several strands of activity, including: The Growth through Insights Programme. This supports businesses to test new product development concepts using data, insight and market research.¹² This strand of support was piloted in 2023/24 with five and 2024/25 with four Invest NI clients going through a 16-week insights-driven innovation programme for concept testing new activity and/or products. Supplier Development Programme. Dunnhumby is a data science company which holds the rights to Tesco Clubcard data. This programme offers support to NI businesses that supply Tesco (with between £1m and £2m cost of goods sold to Tesco) but have further growth potential. The 3-month programme offers access to dunnhumby data for 1 year, three workshops and dunnhumby consultancy support for interpretation of the data. The benefits of this programme for suppliers are anticipated to be an enhanced understanding of their performance within Tesco and shopper demographics, leading to increased sales.
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The Terms of Reference advise that the FDCI Service places a particular focus on the continuous personal and professional development of the FDCI Team through their attendance at exhibitions, conferences, seminars, the receipt of specialist training, and reading reports to ensure that the Team's sector knowledge remains 'current'.

¹² The ToR notes that Invest NI has plans to further development the Insights Academy by supporting food and drink companies to improve their in-house capability in accessing, utilising and interpreting data, through a suite of programmes, digital learning, mentoring and graduate recruitment.

1.2.2 Service Aims, Objectives & Value Propositions

The Terms of Reference advise that the purpose of the Service is to promote, embed and enable **the strategic use of data and insight to stimulate innovation and drive the growth and competitiveness** of NI's food & drink industry.

However, of note, during its first 5 years of activity (up to March 2024), the FDCI Service did not operate under a system of annual or multi-annual business cases. Instead, in each of those years, multiple business cases were developed for different strands of activity, the sum of which in each year is not equivalent to the totality of the Team's activity or costs. Indeed, during the six years under review, 93 individual business cases were developed by the Team, meaning that Business Case development and approval has become, inadvertently, a team 'activity'. It was not until the 2024/25 financial year that the Team developed a one-year business case that sought to encompass the Team's anticipated activity and costs for that year. This is discussed further in Section 2.2.

Consequently, whilst each of the business cases features general aims or ambitions (but in most cases do not feature SMART objectives), they are for small operational aspects of an overall 'Service'.

Separate from the individual business cases developed, the FDCI Service developed annual service-level targets (as reflected in Table 2.9), but for the most part, these are activity-based, as opposed to being output or outcome-focused.

The Business Case that was developed for the single year 2024/25 presented the following Service-level objectives:

1. Data Procurement: To develop a toolkit of data platforms to support the NI food and drink industry in both 1-to-1 and 1-to-Many engagements.
2. Insights Events: Use the toolkit of data platforms and our data partner contracts to deliver a series of events to communicate macro trends, sectoral and channel insights to the food & drink industry in NI. To include the annual conference, 6 x webinars and podcasts.¹³
3. Insights Hub: Use an online portal to widen the reach of market trends and consumer intelligence within the entire NI food and drink industry.
4. Insights Academy: To improve the capability of key companies to interpret and utilise data and insights to drive growth and competitiveness.¹⁴

The FDCI Team defines its value propositions as follows:¹⁵

The FDCI Service provides access to market and consumer data and insights as customers need:

- To know how to use it to improve performance.
- To present market information effectively.
- To improve their sales and marketing capability.
- To develop products that appeal to consumers.
- Financial support to purchase market intelligence specific to their requirements.

In turn, it is envisaged that this allows businesses to take data-driven decisions to innovate, enhance their competitiveness and achieve business growth.

The ToR advises that it is envisaged that the early-stage intervention provided will foster businesses to adopt a more strategic approach to business growth and innovation, de-risking future investment and promoting greater economic return.

¹³ The 6 webinars were anticipated to focus on the Dairy Sector, Meat Sector, Global Drinks Trends, Bakery & Snacks, Hot Beverages, Produce, and other sectors according to identified demand.

¹⁴ The FDCI Team advised that, in this context, a key company was one with growth potential in export markets.

¹⁵ Drawn and adapted from the Business Model Canvas presented in the Terms of Reference.

Of note, the FDCI Team reports that for every £1 invested in the FDCI Service, it estimates a return of £29 to the NI economy.¹⁶ However, the Evaluation Team understands that this figure was calculated based upon a small sample of service beneficiaries drawn from only two aspects (Dunnhumby-related activity and Growth Through Insights) of service activity, and would therefore not be reflective of the Service in its entirety. The Evaluation Team would caution against this as an indication of the economic value of the Service, which, given its stated purpose (per Section 1.2.1), should be based upon its contribution to innovation, sales and competitiveness (e.g. reduced costs, increased profitability, etc.), but reflective of the full costs and benefits attributable to the Service.

Whilst this will be explored further in this report, the Evaluation Team notes that a clearer focus on outputs and outcomes (rather than inputs and activity) will require considerable enhancement in the FDCI Service's objective-setting methodology and its approach to monitoring.

1.2.3 Target Audience/Market

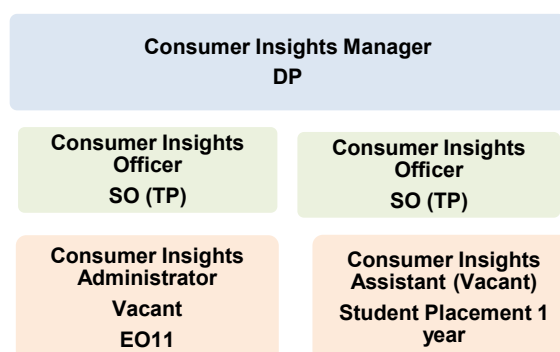
Invest NI advises that the FDCI Service **supports the entire NI food and drink industry**, working across a broad range of sectors and categories, and supports businesses of all sizes and stages of development, from pre-trading and start-up to export growth and inward investment.¹⁷

1.2.4 Service Resourcing

Overall responsibility for the FDCI Service rests with the Invest NI's Head of Consumer Insights (G7 grade), with 10% of their time allocated to overseeing the Service.¹⁸

During the period under review, operational delivery has been undertaken by the FDCI Team. This has largely comprised three team members (a Consumer Insights Manager and two Consumer Insights Officers). 100% of their time is allocated to the Service's delivery. For some time, between 2022 and 2024, the core team had a fourth member of staff at the Executive Officer level. Full details on resourcing across the period are outlined in Section 3.2.

Figure 1.1: FDCI Team Organisation Chart



NB: A Consumer Insights Assistant post, to be filled by a student placement, was approved for the period following September 2025, but did not go forward due to budget restrictions.

¹⁶ Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024

¹⁷ Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024

¹⁸ Invest NI Business Case for the FDCI Service 2025/26, 1st May 2025

1.2.5 Service-Level Risks

The FDCI Team considers that the overall level of risk associated with the Service is ‘Low’, and identifies the following specific risks:¹⁹

Table 1.1: FDCI Service Level Risks		
Risk	Risk Level	FDCI Team’s Suggested Risk Mitigation
Contracts are not awarded.	Low	Ensure that the Invitations to Tender are clear and straightforward. Ensure that the budget is realistic.
Service is underutilised	Low	Demand has been established in previous contracts, and the client base has already demonstrated good engagement.
Data not fully exploited due to skills gap	Low	The FDCI Team is experienced in the use of a range of data platforms and programme management. Additionally, the contracts will include service support from the provider for more complex projects.

¹⁹ Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024

2. FDCI SERVICE ACTIVITY & ACHIEVEMENT OF OBJECTIVES

This section presents summary details of the FDCI Team and Service activity during the period under review, alongside a discussion on the achievement of objectives, where that has been possible.

2.1 Activity

2.1.1 Business Case Development

As reflected in Section 1, during its first 5 years of activity (up to March 2024), the FDCI Service did not operate under a system of annual or multi-annual business cases. Instead, in each of those years, multiple business cases were developed for different strands of activity, the sum of which in each year is not equivalent to the totality of the Team's activity or costs. Indeed, during the six years under review, 93 individual business cases were developed by the Team, meaning that Business Case development and approval has become, inadvertently, a team 'activity'. It was not until the 2024/25 financial year that the Team developed a one-year business case that sought to encompass the Team's anticipated activity and costs for that year.

Table 2.1: FDCI Service Business Case Development by Year	
Year	No.
19/20	19
20/21	11
21/22	15
22/23	20
23/24	17
24/25	11
Total	93

An overview of the business cases that were developed is provided in Appendix II. A review of this appendix would indicate that there was considerable inefficiency in that process, with similar and/or the same activity subject to separate annual business cases, instead of a more holistic and strategic multi-annual approach being adopted sooner.

2.1.2 Data Procurement

Within the materials received, much is discussed on the number of 'data platforms' purchased. A summary of the procurement activity is presented below:

Table 2.2: Data Procurement Activity by Year		
Year	Data Platform Contracts	Ad Hoc Market Reports Purchased
19/20	7	-
20/21	7	-
21/22	10	8
22/23	12	1
23/24	10	2
24/25	12	-

The Evaluation Team notes that, upon review of the 93 business cases prepared, much of the data procured appears to be annual updates of well-known market-recognised reports. However, discussion with the FDCI Team indicates their view that the procurement activity surrounding the individual contracts is complex and subject to annual nuances in the data procured. Nonetheless, the Evaluation Team considers that consideration should be given to establish whether the procurement activities can be streamlined (alongside estimates of expected usage of individual reports by NI food and drink sector businesses), to ensure that as much time as possible is placed upon client-facing activities. For example, if some reports are expected to have substantive annual usage, consider whether they can be procured on a three-year basis, rather than on an annual basis.

A further important observation on both the 2024/25 and 2025/26 Business Cases that have been developed for the Service is that they fail to recognise that the Service is delivered ‘in-house’ and that the purchase of market data and reports is simply the tools that are used to deliver the Service, rather than being the Service. Adopting such a change in perspective should lead, in part, to a change in objective setting and performance monitoring.

2.1.3 Team & Service Development Activities

The FDCI Team reports the following service development activities:

Table 2.3: Team & Service Development Activities					
Year	Staff Development	Presentations Delivered		Promotion	
	External Training Courses completed	External	Internal ²⁰	Articles Published	Case Studies Published
19/20	3	1	2	-	-
20/21	9	3	2	Weekly activity on SharePoint during the pandemic	4
21/22	9	4	2	4	1
22/23	5	6	3	4	3
23/24	9	6	2	1	-
24/25	19	2	2	-	-
Total	54	22	13	9	8

Examples of external training courses completed include:

- Thefoodpeople Trendhub training.
- Euromonitor refresher training.
- Attendance at events/conferences/webinars (Lumina, MCA, Kantar, UU Food Innovation Event, NI Dairy Council Conference).

2.1.4 FDCI Service Offerings Activity

The Evaluation Team notes that, to date, the FDCI Service has not sought to track the number of unique businesses that it has engaged with, and has typically not sought to separate, within its monitoring, interactions with other Invest NI staff members or stakeholders (such as CAFRE personnel) from industry. Also, most monitoring, regardless of support received, labels beneficiaries as delegates or contact points, which the Evaluation Team considers should be reconsidered, and terminologies (e.g. participants) adopted that might be more commonplace across other Invest NI supports.

Following the identification of differences between data presented in the ToR and monitoring data received, the following tables reflect the Evaluation Team’s understanding of engagement and participation across the four main FDCI service offerings. The Evaluation Team notes the following:

- Table 2.4 features the Evaluation Team’s understanding of the number of participations (individuals or businesses, as might be more appropriate) across each of the service offerings.
- Table 2.5 features the Evaluation Team’s understanding of the number of unique participants (individuals or businesses, as might be more appropriate) across each of the service offerings within each year and in total.
- Within both tables, we have sought to disaggregate the number of unique businesses/business representatives where they have been conflated with ‘participations’ from Invest NI staff or other non-business stakeholders.
- For several events and workshops, attendance by businesses and/or stakeholders has not been recorded.

²⁰ This includes presentations by data providers (e.g. Kantar, Lumina, IGD etc.) which have been built into contracts in order to keep staff in the Division up to date with trends.

Upon review and comparison of the data featured in both tables, a key finding is the extent to which individual businesses appear to be repeat users of the services offered, both within and across years. For example, whilst the FDCI Team supported a total of 561 Request for Development Service (RDSs) over the six years, these requests were made by a total of only 164 unique businesses (an average of 3.4 RDSs per business across the period).

It is also noticeable that there are many repeat businesses seeking support for the same service (nominally) within individual years. Again, taking RDSs as the example, in 2024/25, the FDCI Team supported 152 RDSs, but these were made by only 85 businesses (an average of 1.8 each in that year).

Depending on context, the extent of repeat usage might be considered either a positive or negative aspect of activity (e.g. with such repeat usage, there may be a diminishing market failure argument for providing the support). Unfortunately, the nature and focus of monitoring have been on activity rather than (anticipated) outputs or outcomes, meaning that a reliable conclusion cannot be arrived at. For example, no systemic monitoring has been implemented to track the focus of RDSs.

Also, whilst Section 1 outlines that Invest NI advises that the FDCI Service supports the entire NI food and drink industry, working across a broad range of sectors and categories, and supports businesses of all sizes and stages of development from pre-trading and start-up to export growth and inward investment, no monitoring is undertaken of the market segments that it is working with. This diminishes an understanding of what the nature of impact might be, or of understanding the Service's market penetration.

A monitoring system could be readily developed that would address these weaknesses and would require minimal additional effort to maintain.

Table 2.4: Number of Participations

	19/20	20/21	21/22	22/23	23/24	24/25	Total ²¹
Insights one2one							
Request for Development Service (RDS)	42	88	81	80	118	152	561
Data Purchase Grants (including pilot initiatives) ²²²³	2	4	0	0	1	4	11
Total Market Intelligence (MI) Clinic Participants	14	11	28	24	41	25	143
Business Participation in MI Clinics	12	8	26	12	32	25	115
Who Buys My Food? (WBMF) participants	27	45	45	45	0	0	45
Dunhumby Ireland Incubator Programme Participants	0	0	11	13	0	0	13
Centre Visits	n/k	n/k	n/k	n/k	n/k	38	-
Exhibitions & Programmes							
Food Business Development Team (FBDT) Exhibitions (GB & NI) participants	0	0	32	13	78	15	138
Trade Team Exhibitions (International) participants	0	0	0	7	5	14	26
Insights Events							
Workshops delivered (incl. annual seminar)	5	5	11	9	5	7	42
Total attendees at workshops (i.e. including Invest NI staff members and stakeholder organisations, where information is available)	104	30	47	76	206	159	622
Business attendees at workshops (where information is available)	43	30	30	44	n/k	109	256
Total attendees at Annual Seminar	0	231	169	103	111	126	740
Business attendees at the Annual seminar (where information is available)	0	74	104	75	88	77	418
Insights Hub							
Insights Hub Registrations (to that date)	0	109	0	0	152	201	
Insights Hub Active Users		49			95	138	
Insights Academy							
Academy Capability Programme Participants	12	9	28	13	5	4	71
Total FDCI Business Participations (where known)²⁴	138	307	357	302	422	580	

Table 2.5: Number of Unique Participants

	19/20	20/21	21/22	22/23	23/24	24/25	Total ²⁵
Insights one2one							
Request for Development Service (RDS)	38	56	48	45	65	85	164
Data Purchase Grants (including pilot initiatives)	2	4	0	0	1	4	7
Total Market Intelligence (MI) Clinic Participants	13	11	27	13	35	24	116
Business Participation in MI Clinics	12	8	25	12	32	24	102
Who Buys My Food? (WBMF) participants	27	45	45	45	0	0	45
Dunhumby Ireland Incubator Programme Participants	0	0	11	13	0	0	13
Centre Visits							
Exhibitions & Programmes							
FBDT Exhibitions (GB & NI) participants	0	0	n/k	13	72	15	86
Trade Team Exhibitions (International) participants	0	0	0	7	5	12	19
Insights Events							
Workshops delivered (incl. annual seminar)	5	5	11	9	5	7	42
Total attendees at workshops (where information is available)	n/k	9	36	40	5	53	86
Business attendees at workshops (where information is available)	n/k	9	30	37	3	45	80
Total attendees at Annual Seminar	n/k	n/k	n/k	n/k	n/k	67	n/k
Business attendees at the Annual Seminar (where information is available)	n/k	n/k	n/k	n/k	n/k	52	n/k
Insights Hub							
Insights Hub Registrations (to that date)	n/k	n/k	n/k	n/k	n/k	n/k	n/k
Insights Hub Active Users	n/k	n/k	n/k	n/k	n/k	n/k	n/k
Insights Academy							
Academy Capability Programme Participants	n/k	n/k	n/k	n/k	5	4	9
Total FDCI Unique Business Participations	50	66	93	92	153	143	304

²¹ where applicable

²² The standalone DPG was not approved for use until April 2021, however the FDCI Team utilised Technical Development Incentive Grant and Export Opportunity Grant for data projects to test out how it might work.

²³ It is understood that across the 11 DPGs, £47,939 has been drawn down. An average of £4,358. Source: Invest NI Business Case for the FDCI Service 2025/26, 1st May 2025

²⁴ Includes all Insights one2one categories (excl. total MI clinic participants), business attendees at workshops and the annual seminar in Insights Events, Insights hub active users and participants on Insights Academy.

²⁵ NB This is not envisaged to sum to the total of individual years, as there has been repeat participants between years.

2.1.5 Profile of Unique Business Recipients of Support

Whilst full information concerning location, segmentation or size of business was not available for all recipients of support through the FDCI Service for the period 2019/25, the following tables provide a summary of these metrics where known.²⁶

Table 2.6: Profile of Recipients of Support by Council Area		
Council Area	No.	%
Antrim & Newtownabbey	4	2%
Ards & North Down	14	7%
Armagh City, Banbridge & Craigavon	47	22%
Belfast	18	8%
Causeway Coast & Glens	21	10%
Derry City & Strabane	12	6%
Fermanagh & Omagh	16	8%
Lisburn & Castlereagh	24	11%
Mid & East Antrim	11	5%
Mid Ulster	19	9%
Newry, Mourne & Down	27	13%
Total	213	100%
% outside the BMA ²⁷		72%

Table 2.7: Profile of Recipients of Support by Segmentation		
Segment	No.	%
Start	56	30%
Wider Business Base	30	16%
Focus	35	19%
Established	64	35%
Total	185	100%

Table 2.8: Profile of Recipients of Support by Size		
Size	No.	%
Micro	48	34%
Small	41	29%
Medium	24	17%
Large	29	20%
Total	142	100%

2.1.6 FDCI Activity Highlights

Where information was available to the Evaluation Team, this section provides details on some FDCI Service activity highlights:

- The 2024 Annual Conference was held at the Loughry Food Technology Centre in October 2024. The 2023 conference was based on the theme of what consumers want. The theme of the 2024 annual conference followed on from that and was focused on what retailers want and the importance of the triple win - retailers, consumers and suppliers. The conference aimed to help businesses understand retailers' strategic priorities and what they are looking for from suppliers in terms of new product launches and account management. The FDCI Team notes that food retailing remains a challenging environment with dynamic consumer demands and rising input costs for suppliers. Consequently, it is important that businesses understand what retailers need from suppliers to service shoppers effectively.

²⁶ This information was missing from some MI Clinic attendees, event attendees and businesses supported to attend exhibitions.

²⁷ The Belfast Metropolitan Area (BMA) is defined as Belfast City, Antrim & Newtownabbey, Lisburn & Castlereagh and Ards & North Down District Council Areas.

The conference featured retail-sector speakers that focused on opportunities in specific product categories, trends in grocery retail and foodservice, global new product launches and cuisines, guidance on launching new products into grocery retail, a buyer presentation, key account management and shopper activation in-store.

Per Tables 2.4 and 2.5, the 2024 Annual Conference was attended by 77 representatives from 52 businesses, alongside representatives from stakeholder organisations such as: CAFRE, DfE, DAERA, Food Standards Agency NI, NWRC, SRC, UU and data providers (including Mintel Group Ltd, Lumina Intelligence, Kantar, Thefoodpeople, IGD).

The annual conference was delivered with the support of Invest NI's Events Team. The themes of the conferences over recent years have been:

- 2020: Health & Wellness - Is Health your Wealth
- 2021: Sustainability - Food for the Greater Good
- 2022: Cost of Living - Helping consumers navigate through tough times.
- 2023: Consumers - What consumers really, really want
- 2024: Retailers - What retailers really, really want

- The FDCI Team consider its Growth Through Insights activity to be a further highlight of its annual activity.

2.2 Achievement of Objectives and/or Targets

As reflected in Section 1.2.2, for most of the period that this evaluation covers, the Service has operated without meaningful strategic (output or outcome-focused) SMART economic development objectives. For example, whilst the Business Case that was developed for the single year 2024/25 presented the following Service-level objectives, none were SMART, or output/outcome focused:

1. Data Procurement: To develop a toolkit of data platforms to support the NI food and drink industry in both 1-to-1 and 1-to-many engagements.
2. Insights Events: Use the toolkit of data platforms and our data partner contracts to deliver a series of events to communicate macro trends, sectoral and channel insights to the food & drink industry in NI. To include the annual conference, 6 x webinars and podcasts.²⁸
3. Insights Hub: Use an online portal to widen the reach of market trends and consumer intelligence within the entire NI food and drink industry.
4. Insights Academy: To improve the capability of key companies to interpret and utilise data and insights to drive growth and competitiveness.

²⁸ The 6 webinars were anticipated to focus on the Dairy Sector, Meat Sector, Global Drinks Trends, Bakery & Snacks, Hot Beverages, Produce, and other sectors according to identified demand.

The Table below provides an overview of the extent to which the FDCI Team has achieved the activity targets that it has set on an annual basis since 2019/20. The following is noted:

- The cells shaded green are those where activity has met or exceeded the target set.
- The cells shaded red are those where activity has been less than the target set.
- The cells shaded blue are those where there has been activity, but no target has been established for that year.

Table 2.9: FDCI Service Target vs Actual														
Deliverables		Targets ²⁹						Actual						
		2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Comments
Data Contracts Procured & Managed		7	7	10	12	10	13	7	7	10	12	10	12	Per Table 2.2.
Data Purchase Grants		0	2		6	2	5	2	4		0	1	4	Per Table 2.4.
RDS Resolved/Complete		30	40	60	60	70	80	42	88	81	80	118	152	Per Table 2.4.
Market Intelligence Clinics	No. of clinics		6	10	12	12		9	12	12	12	14	14	Per Appendix VI, Table 2.
	No. of delegates		24	24	24	24	32	14	11	28	24	41	25	Per Table 2.4.
Exhibition & Programme Support - GB/RoI						10	40			32	13	78	15	Per Table 2.4.
Events Delivered (incl. seminar)	No. of events			4	7	6	7	5	5	11	9	5	7	Per Table 2.4.
	No. of delegates	50	130	160	180	200	280	104	261	216	179	317	285	Per Table 2.4, although full information was not available.
Insights Hub Registrations						100	200					152	201	Per Table 2.4.
Insights Academy	Capability programmes (incl. WBMF)	25	25		45	10		27	45	45	45	0		Per Table 2.4.
	Dunnhumby Ireland				11					11	13			Per Table 2.4.
	Food Safari						10						0	The FDCI Team advised that the 'Food Safari' was not delivered due to resource constraints.
	Growth through Insights Programme					5	5					5	4	Per Table 2.5.
Case Studies			4		4	2			4	1	3	0		Per Table 2.3.

²⁹ Source: FDCI Yearly Targets for 2019/20 to 2023/24. 2024/25 targets are from the Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024

2.3 Summary Conclusion

The FDCI Service has delivered a high volume of activity across multiple strands (Insights one2one, Insights events, Insights hub and Insights Academy). During the initial 5 years of activity, the FDCI Service did not operate under a system of annual or multi-annual business cases. Instead, in each of those years, multiple business cases were developed for different strands of activity, the sum of which in each year is not equivalent to the totality of the Team's activity or costs. Indeed, during the six years under review, 93 individual business cases were developed by the Team, meaning that Business Case development and approval had become, inadvertently, a team 'activity'. It was not until the 2024/25 financial year that the Team developed a one-year business case that sought to encompass the Team's anticipated activity and costs for that year.

To date, the FDCI Service has not sought to track the number of unique businesses that it has engaged with, and has typically not sought to separate, within its monitoring, interactions with other Invest NI staff members or stakeholders (such as CAFRE personnel) from industry. Also, most monitoring, regardless of support received, labels beneficiaries as delegates or contact points, which the Evaluation Team considers should be reconsidered, and terminologies (e.g. participants) adopted that might be more commonplace across other Invest NI supports.

A monitoring system could be readily developed that would address these weaknesses and would require minimal additional effort to maintain.

Furthermore, to date, monitoring has focused on activity, rather than outputs or outcomes.

3. SERVICE BUDGET & COSTS

As a consequence of how the Service has developed since 2019, there is no consolidated projected cost for the period under review. This section, therefore, considers, in detail, the projected cost profile for the single year 2024/25 and the Evaluation Team's understanding of actual service-level costs for the period 2019/25.

3.1 Projected 2024/25 Service-Level Costs (excluding salary costs)

For illustration purposes, the Business Case that was developed for the single year 2024/25 presented the following projected costs (excluding salary costs):³⁰

Table 3.1: Projected 2024/25 Service-Level Costs (excluding salary costs)			
Service Pillar		Cost ex VAT	Cost incl VAT
Data Procurement	Single Year Contracts Costs	£207,163	£248,600
	Multi-Year Contracts – 2024/25 Allocation	£212,250	£254,700
Insights Events		£37,500	£45,000
Insights Hub		£10,000	£12,000
Insights Academy		£75,000	£90,000
Total		£541,913	£650,300

Further information on each of the four elements is provided below:

Data Procurement

Table 3.2: Data Procurement Single-Year Contracts Costs				
Data Type	Supplier/Potential Supplier	Contract Type	Estimated Annual cost	
			ex VAT	incl VAT
Retail & Shopper Insight	IGD	Corporate Subscription	£41,666	£50,000
Global Food & Drink data & insights by category	Globaldata and other potential suppliers	CPD Procurement	£41,666	£50,000
Electronic Point of Sale Data (EPOS) for Market & category sizing, trends and performance metrics	Nielsen IQ or Circana for the UK market.	Invest NI (<£30k) Procurement process - 2 potential suppliers	£25,000	£30,000
	Nielsen IQ for the RoI market			
Loyalty Card Data for Tesco Ireland (joint largest retailer in RoI)	dunnhumby Ireland ³¹	Invest NI (<£30k) Procurement process	£25,000	£30,000
Loyalty Card Data for Tesco UK (the largest retailer in the UK)	dunnhumby UK		£10,000	£12,000
In-store Shopper Activation Insights	Insight Traction	Corporate Subscription	£18,000	£21,600
Foodservice & out-of-home consumer insight	Lumina Intelligence	Corporate Subscription	£20,833	£25,000
	Nielsen IQ CGA	Ad hoc reports - Invest NI <£5k procurement process	£4,166	£5,000
Global Inspiration and Innovation	Thefoodpeople Trendhub	Corporate Subscription	£16,666	£20,000
Horizon Scanning and Technical Insights	Campden BRI	Corporate Subscription	£4,166	£5,000
Total Cost			£207,163	£248,600

It is noted that several data contracts were already in place for 2024/25. These had previously been awarded on a 2 or 3-year basis:

Table 3.3: Data Procurement Multi-Year Contracts Costs – 2024/25 Allocation			
Data Type	Supplier	Contract Duration	2024-25 Cost (incl VAT)
Consumer Panel Data for Market & category sizing, trends and performance metrics	Kantar UK & Ireland	3-year contract - 1 year remaining	£196,700
Spirits sector data & insights	IWSR	3-year contract - 1 year remaining	£40,000
Primary research tool for testing new products and marketing concepts.	Vypr	2-year contract - 21 months remaining	£18,000
Total			£254,700

Consequently, the total pro-rated 2024/25 budget for data procurement was £503,300 incl VAT.

³⁰ Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024

³¹ Dunnhumby is the only provider of this data

Appendix III provides an overview of the individual data sources.

The FDCI Team advises that each of the annual data platforms has been evaluated and assessed for value for money, and the multi-year contracts have been monitored to ensure satisfactory service delivery; however, the mechanisms and metrics by which this is achieved have not been documented.³²

Insights Events

The projected costs associated with the 2024/25 FDCI Events Programme were:

Table 3.4: Insights Events Projected Costs 2024/25		
Activity		Costs (incl. VAT)
Webinars x6	Event-ful for GoToWebinar delivery	10,800
	Guest speaker fees	1,200
	Sub-Total	£12,000
Annual Conference:	Event-ful for Event Management	8,000
	Venue & Catering	4,000
	Guest Speaker Fees incl travel & accommodation	13,000
	Sub-Total	£25,000
Podcasts x2	Delivery Partner	2,000
	Speaker Fees	6,000
	Sub-Total	£8,000
Total costs		£45,000

Insights Hub

The Business Case noted that the Insights Hub was, at that time, **a basic repository**. It was considered that the design could be enhanced with some input from Invest NI's contracted design agency, Genesis, to create a more professional presentation and ease of navigation. The projected costs were as follows:

Table 3.5: Insights Hub Projected Costs 2024/25		
Activity	Costs ex VAT	Total Cost Incl VAT
Genesis - Design Costs	£10,000	£12,000
Total cost	£10,000	£12,000

Insights Academy

The Business Case advised that a key learning from the 2023/24 pilot 'Growth through Insights' programme was that some of the new product development (NPD) projects were already quite far advanced. The concept testing results indicated that some re-engineering was required to better align the suggested product innovations with consumer needs. Consequently, **the FDCI Team proposed that a precursor to the 'Growth through Insights' programme should be developed** to *"horizon scan for inspiration for innovation and to embrace ideas from global cuisines and the most innovative grocery retail outlets"*.

To that end, it was proposed that before the delivery of a follow-on 'Growth through Insights' Programme, the FDCI Team would deliver a **'Food Safari' to London**, based on the theme of healthy, sustainable food. The FDCI Team advised that London was a 'hotspot' for global cuisines and cutting-edge culinary excellence, and there were innovations in grocery retail and foodservice that could provide inspiration for NI food and drink companies to develop new products based around this theme, and grow NI's capability in the supply of convenient, healthy, sustainable food. It was proposed to contract a delivery partner to lead a delegation of 10 NI food and drink companies on a Food Safari to London, culminating in attendance at the Speciality & Fine Food Show in London Olympia Exhibition Centre in September 2024. It was envisaged that at least 5 of the 10 participants would then be inspired to apply

³² Invest NI Business Case for the FDCI Service 2024/25, 19th April 2024

for the Growth through Insights programme to ‘concept test’ one of their NPD ideas emanating from their attendance on the food safari.

To ensure that the Insights Academy reached the wider business base with capability development for all the NI food & drink industry, it was also proposed to develop a series of capability development video tutorials to post on the Insights Hub. These were envisaged to be a follow-up to a series of category management video tutorial series that were developed in 2022 and were already hosted on the Hub. Anticipated topics included how to use emotional intelligence in buyer negotiations and shopper activation.

Table 3.6: Insights Academy Projected Costs 2024/25		
Activity	Costs (excl. VAT)	Cost (incl. VAT)
Food Safari	£30,000	£36,000
Growth through Insights Programme	£40,000	£48,000
Video Tutorials	£5,000	£6,000
Total cost	£75,000	£90,000

3.2 Actual Known Service-Level Costs 2019/25³³

Information provided within the ToR illustrates the cumulative anticipated costs featured within the business cases that were prepared within each year, alongside the cumulative actual costs incurred. The Evaluation Team notes that the costs featured in this table do not reflect the full costs of delivering the Service (most notably, staff costs do not feature) and simply cover costs that were anticipated within the business cases developed.

Table 3.7: Cumulative Anticipated and Actual Costs (per ToR)				
Year	Funding Approved within Business Cases	Actual Delivery Cost	Difference	
			£	%
2019/20	222,208	126,766	-95,442	-43%
2020/21	346,507	207,316	-139,191	-40%
2021/22	498,107	285,016	-213,091	-43%
2022/23	373,515	532,297	+158,782	+43%
2023/24	501,860	487,743	-14,117	-3%
2024/25 ³⁴	590,584	493,425	-97,159	-16%
Total	2,532,781	2,132,563	-400,218	-16%

Concerning the variations between projected and actual business case costs, the FDCI Team notes that data costs are allocated on a monthly basis for accounting purposes. So, for example, if a data contract starts on 01 June, then 10 months are accounted for in that financial year, and the remaining 2 months are accounted for in the following financial year. Hence variances in Business Case costs versus actual financial year costs.

³³ FDCI staff travel and subsistence for the delivery of the one2one service is included in the Insights one2one costs. Staff travel and subsistence for staff development activity is included in the Brand and Staff Development row.

³⁴ ‘Actual’ spend represents a year-end estimate made on 18/03/25.

The ToR also provided the following profile of actual Service expenditure by year:

Table 3.8: Profile of actual Service expenditure by year						
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25 ³⁵
Staff No. in Year	3	4	4	3	3	3
Data Procurement	91,120	181,671	252,813	509,550	405,183	396,565
Insights One2One ³⁶	2,940	1,869	1,004	5,121	6,074	5,971
Insights Events	25,170	23,776	15,887	11,436	39,241	44,464
Insights Hub	0	0	0	0	0	3,044
Insights Academy	0	0	0	200	35,112	39,300
Brand & Staff Development/Digitisation	7,536	0	15,312	5,990	2,133	4,081
Total	126,766	207,316	285,016	532,297	487,743	493,425

The information presented for 2024/25 indicates that data procurement represents 80% of Service costs, with event costs and Insights Academy representing a further 9% and 8%, respectively.

Invest NI notes that within its annual expenditures, annual data contracts are accounted for monthly. Consequently, if a contract is renewed in August, it is accounted for 8 months in that financial year and 4 months in the following year.

Staff Costs

The FDCI Team provided the following overview of FDCI Service-related staff time:

Table 3.9: FDCI Service Staff Time							
Staff Time		2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Head of Consumer Insights (CI) (G7)		10%	10%	10%	10%	10%	10%
FDCI Team	CI Manager (DP)	100%	100%	100%	100%	100%	100%
	CI Officer (SO)	100%	100%	100%	100%	25%	-
	CI Officer (SO)	33%	100%	100%	100%	83%	-
	CI Officer (SO)	-	-	-	-	33%	100%
	CI Officer (SO)	-	-	-	-	-	100%
	CI Administrator (EOII)	-	-	-	100%	100%	-
	CI Administrator (AO)	25%	-	25%	-	-	-
Events Team DP (5 days)		1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
Events Team EOII (5 days)		1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
Digital Comms EOII (6 days)		2.3%	2.3%	2.3%	2.3%	2.3%	2.3%
FTEs		2.74	3.16	3.41	4.16	3.58	3.16

Utilising DfE's Ready Reckoner Staff Costs, the Evaluation has estimated the FDCI Service-related staff costs during the 6 years to be as follows:

Table 3.10: FDCI Service Staff Costs (£)							
Staff Costs	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
Head of CI (G7)	7,573	7,476	7,651	8,098	7,948	8,779	47,526
CI Manager (DP)	56,528	56,760	57,260	59,656	59,464	65,532	355,200
CI Officer (SO)	44,912	45,776	46,588	48,052	11,962	-	197,290
CI Officer (SO)	14,971	45,776	46,588	48,052	39,873	-	195,260
CI Officer (SO)	-	-	-	-	15,949	52,065	68,014
CI Officer (SO)	-	-	-	-	-	52,065	52,065
CI Administrator (EOII)	-	-	-	38,884	37,076	-	75,960
CI Administrator (AO)	7,968	-	8,154	-	-	-	16,122
Events Team DP	1,087	1,092	1,101	1,147	1,144	1,260	6,831
Events Team EOII	708	716	745	748	713	821	4,451
Digital Comms EOII	850	859	894	897	856	985	5,341
Total	134,596	158,455	168,982	205,535	174,985	181,507	1,024,061

³⁵ 'Actual' spend represents a year-end estimate made on 18/03/25.

³⁶ NB The Evaluation Team understands that DPGs are funded via relevant client team cost centres, through Letters of Offer, rather than the FDCI budget. Source: Invest NI Business Case for the FDCI Service 2025/26, 1st May 2025

For illustration purposes, the FDCI Team provided the following overview of FDCI Service staff roles and responsibilities across the strands of the service in 2024/25.

Table 3.11: Key Staff Roles and Responsibilities ³⁷			
	CI Manager	CI Officer	CI Officer
Data Procurement	The CI Manager is the overall lead on data procurement, responsible for business case approval, procurement, and data partner account management.	Feedback on platforms, tender panels, processing of contracts & payments.	Feedback on platforms, tender panels.
Insights one2one	MI Clinics & Collaborative	WBB Lead/RDS support, DPG Lead, IV, Loughry Clinic, RoI FBDT Activity	The CI Officer is the overall lead on one2one, including RDS Lead/WBB support, DPG Support, ATG, NWRC & SRC Clinics, GB FBDT Activity. Development of this service. Continuous improvement. Policies and procedures developed.
Insights Events	Conference lead	The CI Officer is the overall lead on one2many, including webinars & workshops and the insights hub updates and site enhancements. Development of this service. Continuous improvement. Policies and procedures developed.	Support for delivery
Insights Hub	Support for delivery		Suggestions for content updates from data providers
Insights Academy	The CI Manager is the overall lead on capability development activities, including the GTI Programme and dunnhumby supplier development programmes.	Support for delivery	
PR	Case Studies & all other PR	Identifying good cases	
Staff Development Activities	Staff Management & all personal development actions	Personal Development activities	
Service Development	Business Case, Screening and Evaluation		

Concerning those roles, the FDCI Team provided the estimated time spent across the various strands of the service for each team member.

Table 3.12: Illustrated split of time and associated costs								
	CI Manager		CI Officer		CI Officer		Total per annum	
	% time	Cost	% time	Cost	% time	Cost	FTE Time	Cost
Data Procurement	40.0%	26,213	10.0%	5,207	5.0%	2,603	0.55	34,023
Insights one2one	2.5%	1,638	40.0%	20,826	75.0%	39,049	1.175	61,513
Insights Events	20.0%	13,106	20.0%	10,413	5.0%	2,603	0.45	26,123
Insights Hub	2.5%	1,638	20.0%	10,413	5.0%	2,603	0.275	14,655
Insights Academy	20.0%	13,106	2.5%	1,302	2.5%	1,302	0.25	15,710
PR	5.0%	3,277	2.5%	1,302	2.5%	1,302	0.1	5,880
Staff Development Activities	5.0%	3,277	5.0%	2,603	5.0%	2,603	0.15	8,483
Service Development	5.0%	3,277		-		-	0.05	3,277
Total	100%	65,532	100%	52,065	100%	52,065	3.0	169,662

In considering where and how the Service adds value, the Evaluation Team considers that there is likely merit in Invest NI assessing how 'Data Procurement' activities, in particular (but not only), can be streamlined to ensure that greater focus is placed on the direct activity of supporting food and drink sector businesses.

³⁷ Source: FDCI Gantt Chart 2526 FINAL

Other costs

The FDCI Service utilised several data platforms/subscriptions procured by the Business Information Centre (BIC). An estimated cost associated with the FDCI Service usage is outlined below.

Table 3.13: BIC Procured Platforms utilised by the FDCI Service					
Platform	FDCI Usage	Annual Subscription	VAT	Total Annual Cost	FDCI Annual pro rata cost
Mintel	100%	62,206	12,441	74,647	74,647
Euromonitor	40%	35,700	7,140	42,840	17,136
IBIS World	10%	71,190	14,238	85,428	8,543
Frost & Sullivan	5%	36,500	7,300	43,800	2,190
Annual		205,596	41,119	246,715	102,516
Total (estimate over 6 years)					615,096

Of note, it is only food and drink sector businesses that utilised the Mintel data procured by the BIC.

Summary of Actual Known Service-Level Costs 2019/25

The table below provides a summary of the full economic cost of the FDCI Service over the 2019/2025 period.

Table 3.14: Full Economic Costs 2019/25							
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
Data Procurement	91,120	181,671	252,813	509,550	405,183	396,565	1,836,902
Insights One2One ³⁸	2,940	1,869	1,004	5,121	6,074	5,971	22,979
Insights Events	25,170	23,776	15,887	11,436	39,241	44,464	159,974
Insights Hub	0	0	0	0	0	3,044	3,044
Insights Academy	0	0	0	200	35,112	39,300	74,612
Brand & Staff Development/Digitisation	7,536	0	15,312	5,990	2,133	4,081	35,052
Sub-total	126,766	207,316	285,016	532,297	487,743	493,425	2,132,563
Staff Costs	134,596	158,455	168,982	205,535	174,985	181,507	1,024,061
BIC Procured Data	102,516	102,516	102,516	102,516	102,516	102,516	615,096
Total	363,878	468,287	556,514	840,348	765,244	777,448	3,771,720

³⁸ NB The Evaluation Team understands that DPGs are funded via relevant client team cost centres, through Letters of Offer, rather than the FDCI budget. Source: Invest NI Business Case for the FDCI Service 2025/26, 1st May 2025

4. PARTICIPANT & STAKEHOLDER FEEDBACK

4.1 Introduction

This section of the report provides a summary of key findings drawn from:

- A survey of 83 of the 304 unique FDCI Service participants. See Appendices XIII and XIV for the detailed survey analysis; and
- Consultations with 32 key stakeholders (internal and external to Invest NI). See Appendix XII for details of consultees.

4.2 Participants' Views & Satisfaction with the FDCI Service

4.2.1 Profile of Respondents by Support Received

Whilst most respondents (82%, N=83) were able to identify the support received from one or more of the strands of the FDCI Service, a minority (18%, N=83) of respondents indicated that they did not recall receiving support from the FDCI Service.

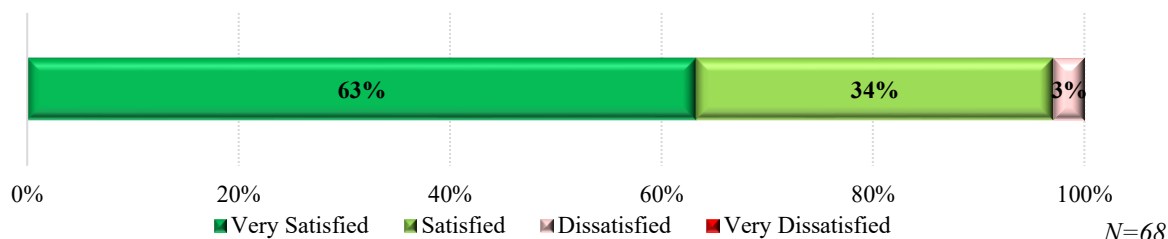
Table 4.1: Support Received	
Strand	%
A Market Information Request where a FDCI Team member responded to a request for information/support made by your business and provided market intelligence information to support your business in areas such as sales or new product development activities.	57%
Attended an event, workshop or seminar organised by the FDCI Team where market intelligence data relevant to your business will have been presented and discussed.	46%
A visit to the FDCI's Market Intelligence Centre at Invest NI's headquarters in Belfast to receive advice and guidance using market/consumer intelligence to support your business in areas such as sales or new product development activities.	29%
Made use of information held on the FDCI Service's Insights Hub . This is an online web portal (housed on the Invest NI corporate website) that businesses can use to access information on market trends and consumer intelligence featured in reports, presentations, recordings of events, etc.	29%
Market intelligence information to support your attendance at a trade or consumer exhibition	23%
A Market Intelligence Clinic where the business met (in person at a location away from Invest NI's headquarters in Belfast) with a member of the FDCI Team to receive advice and guidance using market/consumer intelligence to support the business in areas such as sales or new product development activities.	20%
A participant in the Supplier Development Programme . This programme supports businesses to develop their sales with Tesco using dunnhumby data drawn from Tesco Clubcard.	16%
A participant on the Growth through Insights Programme . This supports businesses to test new product development concepts using data, insight and market research.	6%
A Data Purchase Grant (DPG) , where the business will have received grant support to purchase specific market intelligence data that Invest NI did not already hold.	5%
Could not recall receiving support from the FDCI Service	18%

Those respondents who indicated that they did not recall receiving support were routed to end the survey; the rest of the analysis is based on 68 respondents.

4.2.2 Overall Satisfaction with the FDCI Service

On an overall basis, almost all (97%, N=68) respondents were either satisfied (34%) or very satisfied (63%) with the support received through the FDCI Service.

Figure 4.1: Overall satisfaction with the support provided through the FDCI Service



As reflected in the comments in Appendix XIII, those respondents who were satisfied with the support received generally spoke about:

- The FDCI Team as being helpful, pleasant to work with, knowledgeable and highly responsive.
- Their appreciation for receiving up-to-date market insights.
- How the data insights were critical to their business' growth and development.

In keeping with these findings, all (100% N=68) respondents indicated that they would recommend the FDCI Service to other businesses to assist them in pursuing market opportunities or introducing new products.

4.2.3 Satisfaction with the Support Received

Respondents also reported high levels of satisfaction with individual aspects of the FDCI Service, with most (78%+) respondents (where relevant) in agreement that:

- The FDCI Team was **knowledgeable** about their (the business') sector, with almost all (97%, N=67) respondents in agreement – 57% 'strongly agreed' and 40% 'agreed'.
- The information received was of value to help them **achieve their growth plans** (99%, N=67).
- The information received helped them generate **new sales** (87%, N=55).
- The information received helped them **retain customers** or sales (88%, N=56).
- The information received helped **inform new product development activity** in their business (90%, N=61).
- As a result of the advice and guidance received, they have **introduced an NPD (new product development) process** that can be repeated for future innovations (78%, N=51).

As reflected in the comments in Appendix XIII, key points raised by respondents included:

- Many respondents described the FDCI Team as knowledgeable, helpful, responsive, and willing to "go above and beyond", including guiding businesses through the data purchase grant process and proactively sharing relevant data.
- Several respondents noted that the information received was useful, timely, digestible, and of significant benefit in helping their business understand consumer trends, category performance, pricing/format/USP opportunities, and overall market dynamics.
- Several respondents highlighted that the data helped to make them more confident in their decision-making, facilitated positive internal and external conversations (with retailers, distributors, customers), and strengthened their credibility when entering or exploring new markets.
- Businesses used the service to assess market potential, prioritise where to compete (and where not), and inform export decisions. It was highlighted that this was especially valuable for small firms that could not otherwise afford high-cost datasets.

In a minority of cases, respondents noted that the market intelligence they desired was not available or that the information was not sufficiently up to date to support their decision-making.

4.2.4 *Participants' Recommendations for Improvements*

Participants' recommendations for how the support offered through the FDCI Service could be improved typically related to:

- Broadening data access, particularly related to retailer intelligence (e.g. dunnhumby and other retailer data).
- Enhancing the ability to undertake self-serve research and the insights hub usability.
- Increasing awareness of the service. NB This was a particularly prevalent aspect of the feedback received.
- Expanding the programme of events and webinars.
- Creation of a regular 'newsletter' highlighting new insights, datasets and key reports.

4.3 **FDCI Service Impact on Participants' Businesses**

This section considers the impact (both monetary and non-monetary) that receiving support through the Service has had on participants.

4.3.1 *Stage of Business Development before Receiving Support from the FDCI Service, and now*

At the time of receiving support through the FDCI Service for the first time, almost all (93%, N=68) of the respondents were trading, either solely in Northern Ireland (27%) or in markets outside NI (66%). Very few (7%) respondents had not yet started trading.

At the time of consultation (January/February 2026), almost all (93%, N=68) of the respondents were trading, with 83% trading in markets outside NI. One business indicated that it had ceased trading.

4.3.2 *Role of the FDCI Service*

Respondents indicated that the following factors led them to seek FDCI support:

- The business required market or consumer information but **could not afford** to purchase it directly from published sources (e.g. Mintel) (62%, N=68).
- The business required market or consumer information but **did not know where else to access it** (49%, N=68).
- The business required market or consumer information, but was **unable to access it elsewhere** (24%, N=68).

The key purposes that respondents required the market/consumer intelligence for included:

- They needed **information on a specific product** category (76%, N=68).
- They needed information to **inform new product development** activity (68%, N=68).
- They needed **information to inform discussions** with a potential new customer (60%, N=68) or an existing customer (53%, N=68).
- They needed information to **inform new sales activity** (51%, N=68).

4.3.3 Levels of Activity Additionality associated with the FDCI Service

The net impact of the FDCI Service (i.e. its additionality) relating to an individual's decision to engage in similar activities to pursue sales growth or new product development opportunities can only be measured after making allowances for what would have happened in the absence of the support from the FDCI Service. That is, the support must allow for deadweight. 'Deadweight' refers to the activity that would have occurred without the intervention, i.e. the FDCI Service.

Depending on the response provided by participants to a specific set of questions, a level of additionality/deadweight was applied. For example, a respondent who indicated that they definitely would not have engaged in activities to pursue sales growth or new product development opportunities in the absence of the FDCI Service would have been assigned a level of 100% additionality (i.e. full additionality). Conversely, a respondent who indicated that they definitely would have undertaken the activities in the same manner and timescale regardless of their participation in the FDCI Service would have been assigned a level of 100% deadweight (i.e. no additionality). Other responses were given a weighting somewhere between these two extremes (i.e. a level of partial additionality).

The outcomes of the analysis are provided below:

Table 4.2: Activity Additionality/deadweight (N=68)	
Additionality	Deadweight
58%	42%

However, it should be noted that most (85%, N=68) respondents indicated that the FDCI Service played some role in their decision to undertake activities to pursue growth opportunities outside NI, i.e. there was at least partial additionality associated with 85% of responses.

4.3.4 Outputs associated with the FDCI Service

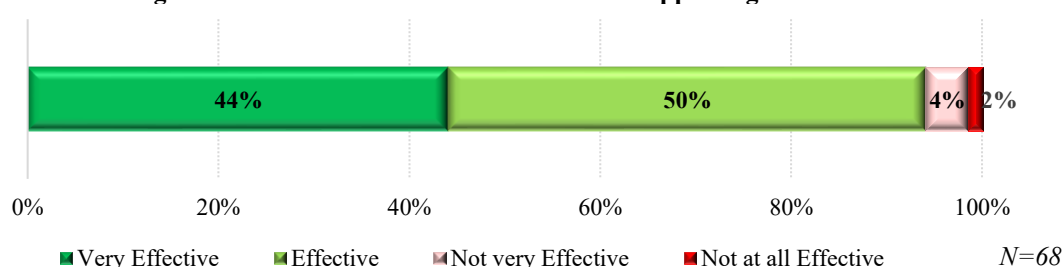
As a result of the FDCI Service support, respondents reported that their business had (as of January/February 2026):

- Strengthened their relationship with an existing customer(s) (75%, N=68)
- Gained new customers (65%, N=68)
- Improved the way they approached new product development and the processes they used (62%, N=68)
- Achieved new or additional sales (62%, N=68).
- Introduced a new product(s) (54%, N=68)
- Enhanced or changed an existing product(s) e.g. recipe reformulation (43%, N=68)
- Begun trading in a new geographic market (38%, N=68).

4.3.5 The Effectiveness of the Support Received

Almost all (94%, N=68) of the respondents considered that the support received through the FDCI Service in terms of supporting the business to pursue market opportunities or introduce new products was either 'effective' (50%) or 'very effective' (44%).

Figure 4.2: Effectiveness of FDCI Service in supporting business



4.3.6 FDCI Service Contribution (to date & Projected) to Sales and other Business Outcomes

Gross Sales & GVA

More than three-fifths (62%, N=68) of businesses indicated that they had achieved growth in their sales (as of January/February) as a result of the support received through the FDCI Service.

Almost two-thirds (62%, N=42) of businesses that had achieved sales were willing and able to provide details of the additional sales that they had achieved since receiving support from the FDCI Service. Across the 26 businesses, they suggested that their turnover had increased by a cumulative c. £5.7m.

Using the information reported by the survey respondents, the Evaluation Team's grossing-up analysis indicates that the FDCI Service has contributed (at least in part) to supporting businesses to derive gross sales of c.£23.4m, 60% (or c. £14.1m) of which was derived in external markets, either in GB (30% or £7.1m) and/or export (30% or c£7m) markets. The application of the NI average sectoral level of GVA (i.e. 38.1%³⁹) suggests that these businesses have potentially contributed approximately c.£8.9m of gross GVA to the NI economy.

In addition, 55 respondents indicated that they anticipated achieving additional sales, 58% of whom were willing and able to provide projections of the anticipated level of additional sales over 2 years, estimated at c.£21.2m. The Evaluation Team's grossing up analysis indicated that the FDCI Service support has the potential (at least in part) to support businesses to derive additional gross sales of £72.6m over 2 years.

Table 4.3: Gross Sales and GVA – Actual and Anticipated over 2 years		
	Actual	Anticipated over 2 years
Survey Sample		
No. of sample businesses ⁴⁰	83	83
No reporting increased sales (actual or anticipated)	42 (51%)	55 (66%)
No. able or willing to quantify actual or projected sales	26 (62%)	32 (58%)
No. of outliers	1	3
Range (sales)	£5k-£2m	£13k-£4.1m
Mean (excluding outliers)	£147,760	£321,483
Median (excluding outliers)	£89,000	£145,000
Total (excluding outliers)	£3,694,000	£9,323,000
Total Gross Impact for Sample (including outliers)	£5,694,000	£21,173,000
Population		
Total no. of participant businesses (trading)	289	289
Total Gross Impact for Population (excluding outliers)	£21,425,200	£60,760,241
Total Gross Impact for Population (including outliers)	£23,425,200	£72,610,241
GVA	38.1%	38.1%
Gross GVA	£8,925,001	£27,664,502

Table 4.4: Value of Additional Sales derived and/or anticipated by location (Gross)						
	Actual Sales			Anticipated Sales		
	%	Sample	Population	%	Sample	Population
NI Sales	40%	£2,263,000	£9,310,015	23%	£4,950,000	£16,975,426
GB Sales	30%	£1,737,500	£7,148,101	50%	£10,445,000	£35,819,864
Export Sales	30%	£1,693,500	£6,967,084	27%	£5,778,000	£19,814,952
Total Sales	100%	£5,694,000	£23,425,200	100%	£21,173,000	£72,610,241
Total External Sales (outside NI)	60%	£3,431,000	£14,115,185	77%	£16,223,000	£55,634,815

³⁹ Source: NI Annual Business Inquiry - NI Non-Financial Business Economy 2023 Provisional Reporting Unit Results (December 2024)

⁴⁰ NB: 18% of the sample (15 respondents) did not recall receiving support.

Employment

A minority (13%, N=68) of respondent businesses indicated that they had achieved employment growth as a result of the support received through the FDCI Service. Only 3 of these businesses were willing and able to quantify the impact of the support on their employment levels and suggested that they had increased employment by 5 FTEs. Grossing this up to the unique number of participant businesses (N=289) suggests that **the FDCI Service has helped to create 52 FTE jobs**.

Other Impacts

In addition, respondents reported several other impacts as a result of the receipt of FDCI Service support, including:

- Increased competitiveness (54%, N=68).
- Improved the skills of their workforce (29%, N=68); and
- Increased productivity/efficiency (26%, N=68).

The key points raised by respondents concerning the achievement of impacts were as follows:

- Market intelligence was **shaping strategy and decisions** - Respondents described market intelligence as actively guiding business direction, reshaping strategic priorities, and improving confidence in decision-making.
- The Service has had a clear **influence on NPD** and product choices (including avoiding costly mistakes) – Several respondents cited impacts on new product development: flavour selection, category confidence (e.g., frozen), recipe formulation, packaging/communications, and embedding consumer/market data into the NPD process. Several explicitly stated that the insight helped them avoid pursuing the wrong concept/flavours, preventing costly errors and enabling ‘fail fast’ thinking.
- **Better customer/retailer engagement** and stronger negotiation position - Respondents reported that the data strengthened discussions with retailers and distributors (e.g., pricing/margin conversations), supported preparation for range meetings, and helped negotiation on listings. It also helped build credibility with customers.
- **Route-to-market and market entry impacts** – Respondents highlighted impacts including identifying new routes to market, developing market entry strategies, and sharpening positioning using competitor and target customer insight.
- Support for **expansion of exporting** – Several respondents considered that the insights supported expansion or sales into various new geographies (including ROI, Germany and UAE).

4.3.7 Levels of Additionality & Displacement

Similar to a business’s decision to implement certain activities, the net impact of the FDCI Service (i.e. its additionality) on recipient businesses’ impacts (incl. sales and employment) can only be measured after making allowances for what would have happened in the absence of the service. That is, the impact must allow for deadweight.

The analysis of individual survey responses and application of the same ‘participant self-assessment’ methodology used to assess ‘activity additionality’ results in the following levels of ‘impact deadweight and additionality’⁴¹:

Table 4.5: Impact Additionality/deadweight (N=68)	
Additionality	Deadweight
61%	39%

However, it should be noted that most (85%, N=68) of respondents indicated that the FDCI Service played some role (i.e. partial additionality) in their ability to achieve the impacts reported.

⁴¹ See Appendix XV for further details.

The Evaluation Team has also considered the potential displacement that might be created by the impact of the FDCI Service support. To assess this, we have again utilised a series of questions⁴²; the answers to which are assigned a ‘displacement factor’ in both the NI market and the broader UK market. We have calculated displacement based on two factors:

1. The proportions of the businesses that participants compete with that are based in NI/GB, keeping in mind the markets in which their company sells, and
2. Whether, in the participants’ area of business, market conditions have improved over the period since receiving support.

On an overall level, the Evaluation Team’s analysis suggests that the displacement factor at the NI level is 27%, whilst at the GB level, it is 19%.

4.3.8 Net Additional Impacts associated with the FDCI Service

The removal of the calculated levels of impact deadweight (39%, N=68) and NI-based displacement (27%, N=68) to the gross monetary impacts potentially achieved by the total participant businesses suggests that (up to Jan/Feb 2026) the FDCI Service may have directly:

- Contributed in the region of c.£4m in net additional GVA to the NI Economy to date, with an additional net additional GVA of £12.3m anticipated over the next two years.
- Created approximately 23 net additional FTE jobs.

Table 4.6: Net additional monetary impacts			
	Actual GVA	Anticipated GVA (over 2 years)	Employment (FTEs)
Gross	£8,925,001	£27,664,502	52
Less Deadweight (@ 39%)	£3,480,750	£10,789,156	20
Sub-total	£5,444,251	£16,875,346	32
Less Displacement (@ 27%)	£1,469,948	£4,556,343	9
Net additional	£3,974,303	£12,319,003	23 FTE Jobs

Based on the Evaluation Team’s estimate of the full economic cost⁴³, the minimum return on investment delivered by the FDCI Service over the period April 2019 to March 2025 would be £1.05. However, if the anticipated benefits are achieved, the return on investment could increase to £4.32.

Table 4.7: Estimated Return on Investment			
	Net Additional GVA	Full Economic Cost	Return on Investment
Actual	£3,974,303	£3,771,720	£1.05
Actual + Anticipated	£16,293,306		£4.32

4.3.9 Unexpected Impacts or Benefits Achieved

A significant minority (37%, N=68) of respondents indicated that the receipt of the FDCI Service support had led to other benefits or unexpected impacts/benefits for them or their business. The types of unexpected impacts/benefits identified were as follows:

- Improved **confidence** in new product development and/or the business and/or the marketplace (N=6)
- Supported the development of a **wider business strategy** (N=3).

⁴² Developed in conjunction with DfE’s Economists.

⁴³ Inclusive of delivery costs, costs associated with BIC procured data platforms and staff costs.

4.4 Stakeholder Feedback

Key findings emerging from the stakeholder consultations are summarised below.

- Within Invest NI, there was strong recognition of the ‘uniqueness’ of the food and drink sector, and strong support for the continuation of an insights service.
- All third-party organisations (TPOs) consulted highlighted their positive working relationship with the FDCI Team, and how the FDCI Service increases the knowledge of the staff and students in the TPOs.
- In addition, the expertise, professionalism and helpfulness of the FDCI Team were praised.
- All TPOs emphasised the continuing need for the FDCI Service, given the importance of data and insights in the food and drink industry in informing strategy and driving innovation.
- The annual seminar is considered to be a benefit for the sector as it provides an opportunity to bring the sector together for learning and networking. It was highlighted that there could be more workshops/webinars throughout the year to share findings on emerging trends (e.g. GLP-1⁴⁴) and challenges impacting the sector (e.g. sustainability).
- It was emphasised that the MI Clinics are an excellent way to support small (and new) businesses to enter and grow in a fast-paced sector. A key benefit identified for businesses engaging in the MI Clinics is that they are better prepared to move forward, whether that be with an innovation voucher or other product development activity.
- The access to insights and data through the FDCI Service has supported the development of technical guidance (as part of the FSA’s Making Food Better programme) in various sectors, including ice cream and pancakes. The FSA outlined that identifying research on the pancake sector through the service drove the rationale for developing the reformulation guidance, which was launched in July 2025.
- Ulster University (UU) and the FDCI Team are hoping to trial a new collaborative Doctoral Partnership from September 2026. As part of this PhD research project, the researcher would spend some time based in Invest NI to bring academic insight and analysis to the service.
- Several TPOs emphasised the continuing need for and importance of access to retailer data (such as dunnhumby) for local businesses.
- There was consensus that the service could be more widely promoted to enhance awareness of it.

⁴⁴ A class of medications used to treat diabetes and obesity.

5. BENCHMARK OFFERINGS

This section considers similar support available to businesses located outside NI, including:

- The Thinking House offered by Bord Bia in the Republic of Ireland.
- The Knowledge Bank offered by Scotland Food & Drink.
- The Insight Programme offered by Food & Drink Wales.

5.1 Bord Bia's Thinking House

Bord Bia is the Irish state agency funded by the Department of Agriculture, Food and the Marine. It is dedicated to promoting Ireland's food, drink, and horticulture sectors at home and abroad. Its mission is *"to boost the success of Irish food, drink, and horticulture producers"*. Bord Bia aim to achieve this by aligning its support with the efforts of the industry, helping them to anticipate and respond to changing market needs and to generate demand for their produce.

To become a Bord Bia client, a business must meet the following criteria:

- It must be generating a turnover exceeding €100,000 from selling through third parties, i.e. shops, foodservice, etc.
- Its product must be manufactured in the Republic of Ireland.

A focus area within Bord Bia's current strategy is on 'Exploiting Data for Insights and Direction'. Bord Bia considers that the power of data will be a critical factor in the way it achieves lasting value for the food, drink, and horticulture sectors. Consequently, it intends to gather and curate large amounts of relevant data for these sectors. It will use new digital tools to help find insights tailored to the sectors' needs. It is envisaged that these insights will help the sectors respond to global trends and adapt to new market conditions.⁴⁵

They consider that in a highly competitive global marketplace, a deep understanding of the consumer and insights are needed to effectively communicate relevant points of difference.

Bord Bia wants its people to focus on work that makes a difference – to achieve this, it will use sophisticated software tools to increase efficiency and the interrogation of data.

Bord Bia services and supports delivery across four key areas:

1. Insight
2. Growth
3. Talent
4. Reputation

Under the area of 'Insight', Bord Bia provides leading market and consumer insight and intelligence to support the sustainable growth of the Irish food, drink and horticulture industry. Using what it describes as state-of-the-art intelligence and techniques, Bord Bia generates insights from global markets to optimise the commercial success of food production, matching food product evolution and development with genuine and verified consumer needs.

In this way, Bord Bia aims for the branding and innovation chains of the Irish food, drink and horticulture industry to start with the consumer and end with the consumer.

Bord Bia gathers, disseminates and facilitates the application of intelligence, insight and thinking to support the accurate and timely innovation needed for sustainable growth.

⁴⁵ Smarter Sustainable Impact, Bord Bia Strategy 2025-2028

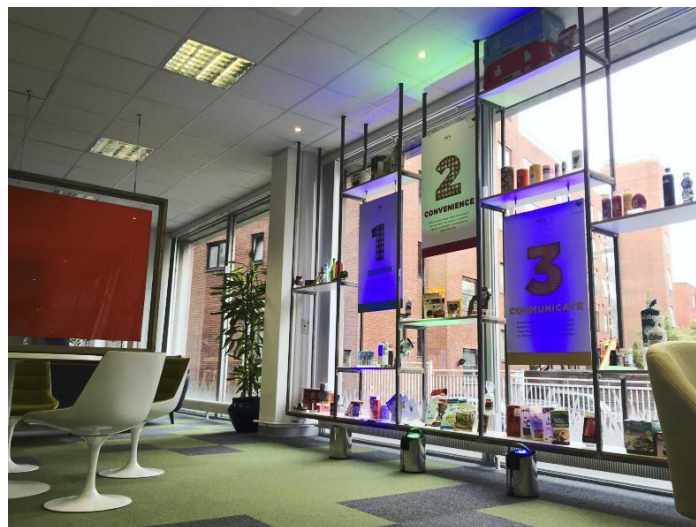
Bord Bia's Thinking House is its centre of excellence for market insight and a space for collaboration, integration and interaction. It describes it as being a dynamic, research-focused environment designed to break down silos and connect stakeholders, translating commercial aspirations and product concepts into sustainable, scalable products and brands built on verified consumer needs.

Of note, the Thinking House both undertakes (and publishes) and commissions its own research alongside procuring market intelligence similar to Invest NI's FDCI Team. For example, in 2024, significant outputs included (amongst several others) reports on the future of dairy in the UK, the growth opportunities presented by gut health and alcohol trends in developing markets. In this way, it takes a proactive approach to shaping Ireland's future innovation agenda and adopts a thought leadership role.

Its work includes foresight, insight and trend studies designed to help client companies navigate both current and future challenges. Industry capability development helps clients to unlock commercial wins by building their capabilities in strategy, marketing and business development. The brand development, innovation and client insight team works directly with client companies to deliver bespoke projects to capture and create value. This work is underpinned by that of the knowledge management and market intelligence team, which facilitates insight-led and data-driven decision-making.

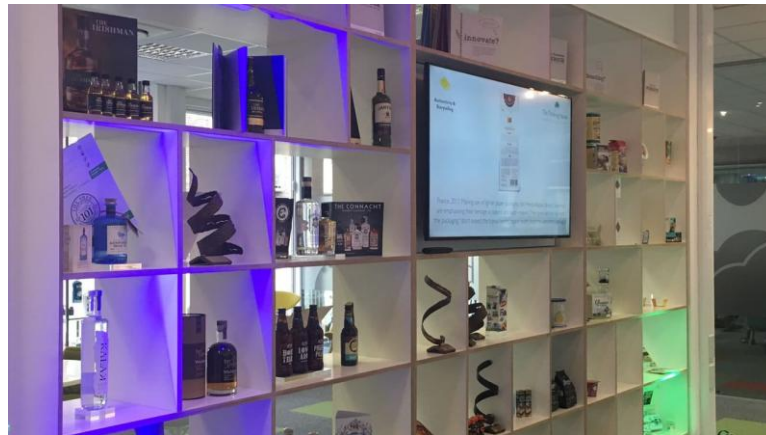
Of note, also, some 60 bespoke brand development projects were live at any one time during the year (2024), while several recent branding projects led by the Thinking House received industry accolades during that year.⁴⁶

Figure 5.1: The Thinking House



⁴⁶ Bord Bia Annual Report & Accounts 2024.

Figure 5.2: A display of brands on show at the Thinking House



The Thinking House was launched in 2016 and is located at Bord Bia's headquarters in Dublin. It is a 7,000 sq. ft. premises. It states that it provides Ireland's food, drink and horticulture industry with unrestricted access to the latest global trends, research, consumer insights and industry innovations. It includes:

- A Trend Zone to highlight the latest food and drink innovations from around the world, and a packaging and branding gallery to promote best-in-class design. The Trend Zone also showcases Bord Bia's recent work with Irish food and drinks brands.
- A Packaging and Branding gallery to promote best-in-class design and to showcase Bord Bia's recent work with Irish food and drink brands.
- A working space, with room for up to 70 people, is available for the industry to use for workshops, meetings and presentations.
- The 'Living Room', which allows Bord Bia and the industry to conduct qualitative focus groups and discussion groups. This room is equipped with audio, video recording and live streaming capacity, along with **a library, which provides access to a wide range of databases and reports** which may have been financially prohibitive to source for many SMEs working in the industry. In order to use this service, a business must be engaging with its Local Enterprise Office (LEO) or be completing the Food Starter programme.

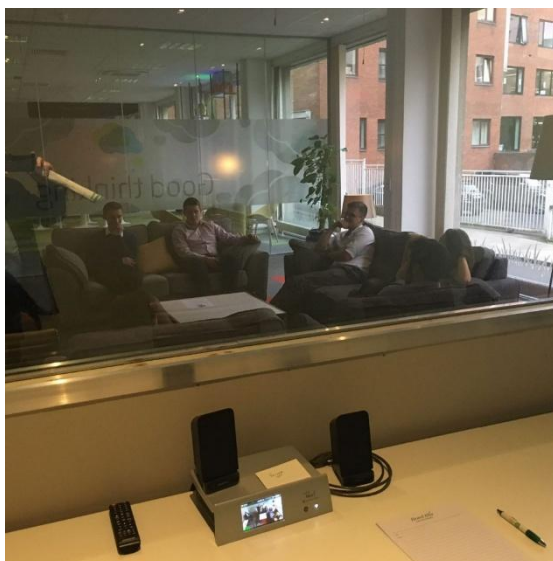
The library service is run by a team of professional librarians who work with the business to get a clear understanding of its information needs and use their information skills and experience to find the information best suited to answer the business challenge.

The library team produces several Hot Topic Reports and Insight Articles each year based on Library resources. For example, in 2024, Hot Topic Reports were published on subjects such as AI and Gut Health, Category Understanding Reports such as Beef in Italy, Yoghurt in Germany and Bakery in the US, as well as Trade Show Review reports such as VITAfoods and the Sustainable Food Summit. In that year, a number of Insightful Articles were published by the Knowledge and Market Intelligence Team. Topics included *"5 reasons why cocoa prices are surging"*, *"5 areas where AI will shape the food and drink industry"*, *"2024 Diet Trends"* and more.

The centre and creative space is managed by a Director of Consumer Insight, and a team of 12 professionals with backgrounds ranging from psychology to librarianship.⁴⁷

⁴⁷ <https://www.agriland.ie/farming-news/video-bord-bia-launch-state-of-the-art-research-centre/>

Figure 5.3: The Living Room in Bord Bia's Thinking House



A few examples of the tools that the Thinking House uses or has used include:⁴⁸

Library and Information Services	The library at the Bord Bia Thinking House maintains a world-class library which helps Irish food and drink companies make better and more informed strategic decisions. The agrifood industry can request professional, tailored groundwork searches from a team of qualified librarians, who provide access to consumer and market insights needed to successfully compete in the domestic and global markets.
Bespoke Insight & Innovation Work	This bespoke work covers client projects that are project-managed by the insight team. These projects can either be fully executed in-house or executed with the services of external agencies. Each project warrants its own bespoke approach depending on the nature of the objectives, which can include consumer and category insight, branding and NPD support to facilitate innovation. Methodologies can span both quantitative and qualitative, and projects can be conducted in domestic and international markets.
Original Research	Original Research provides market and consumer insight to enable companies to have a deeper understanding of topics and make informed commercial decisions. Each year, Bord Bia commissions bespoke insight projects which focus on specific areas, whether it be consumer life stages, meal occasions or food categories.
Foresight and Trends	Leveraging market and consumer trends can encourage companies to create a more forward-looking, outward-looking and consumer-centric mindset amongst decision makers in their organisations. Bord Bia provides future-focused category and industry knowledge that enables client companies to adopt a longer-term and more strategically focused outlook.
Consumer Taste 'n' Tell.	This programme provides a quantitative measurement of product performance and concept appeal with Irish and/ or European consumers to help optimise commercial success. The risk of innovation is reduced not just through the screening and evaluation of new product concepts, but also by benchmarking them against competitors. The results allow clients to determine their product's appeal versus other varieties/benchmark products; they can aid with further recipe Bord Bia's Brexit Action Plan 13 development, retail buyer pitches and concept re-design, etc.
BI: TES – Better Ideas: Think, Evaluate, Select	BI: TES is Bord Bia's concept iteration and validation tool, which helps clients quantitatively evaluate concepts with consumers to understand their feasibility, before investing further time or money in developing or launching the concept. BI: TES can be used to test innovation, proposition, products and packaging concepts with consumers, to support clients in bringing better ideas to the market.
Brand Forum	'The home of Irish Food Brands' is a membership service delivering best practice marketing thinking to participating clients. The service includes quarterly Inspiration Events, Marketing Capability development workshops, Directors' Briefings, a quantitative brand health tracking service and a recipe video and content production service.
SuperBrands	A tightly defined, brand development 'starter pack' service which delivers brand proposition, qualitative research and pack design for smaller businesses (<€5m) for a fixed client cost. SuperBrands is designed to be accessible to businesses that would not have the expertise, capability or resources to access and navigate these services independently.

⁴⁸ Bord Bia's Brexit Action Plan Customer Relationships. 4th edition: September 2020

Bespoke Brand Building	Bespoke brand building service for larger client companies (>€5m). Provision of expert guidance, strategic thinking and project management on the creation of new branded offerings, innovations or brand extensions. Helping client companies navigate insight generation, proposition building and targeting, visual identity creation, qualitative and quantitative research, and validation.
Brand Activation	Bespoke service offering for Bord Bia client companies. Expert guidance, strategic thinking and project management on both short-term, performance marketing and longer-term, incremental brand equity building activities, including ATL comms, PR, digital media and In-store activation
UK Consumer Pulse Survey	This large-scale online survey of grocery shoppers, across an extensive range of categories, is designed to collect and analyse important information to help brand owners in: Brand Awareness; Brand Consideration; Brand Commitment; Brand Experience; Brand Equity Future; Brand Potential; and an overall metric of Brand Health.
UK Consumer Pulse Survey	Bord Bia has tracked UK consumer sentiment throughout 2019 to gain an in-depth understanding and develop insights on how the Brexit process is impacting both perceptions and attitudes towards the Republic of Ireland and its main food and drinks categories. This research reached a nationally representative sample of 1,000 grocery shoppers in six bi-monthly waves in 2019. The findings outline the strong positioning of Irish food and drink in the UK market and indicate that it will continue in 2020
The Cultivate Engine	Bord Bia's Thinking House has developed a new trends platform called Cultivate. It's a large-scale, global programme of research that surfaces, tracks and measures emerging consumer behavioural trends over time. The study offers a series of innovation pathways, uniquely designed to help food and drink businesses stay up to date with the living world of consumer trends and to navigate these trends in pursuit of sustainable value capture and creation. The Cultivate Engine helps guide businesses as they think about which behavioural trends to innovate for now and which to prepare for in the near future. The Cultivate Engine is built upon three key components which dynamically evolve as trends emerge and mature. 1. Seed – This identifies early-stage behavioural trends through scanning: • 33,000+ research signals, reports, and case studies exploring behavioural change. • 20+ global industry sources researched for signals of change and innovations. • Consulting with 10 Cultural Lifestyle Insiders from important cultural capitals of the world. • STEEP analysis for identifying the broader societal and cultural drivers creating new consumer needs and contexts. 2. Feed – This monitors real-time traction of behavioural trends. It tracks real-time developments of behavioural trends through: • The Cultivate Feed: a bespoke AI-powered custom library feed of new signals of change built for the Bord Bia Thinking House team. • Tracking real-time spikes and conversations through social listening data sources (powered by Quid Social). 3. Thrive – This measures the adoption and potential of behavioural trends. It tracks and measures trends every year through: • The Annual Global Survey measures the current and potential future adoption of trends. • 10,000 respondents across Ireland, Germany, France, the UK, Italy, the Netherlands, the USA, Nigeria, China, and Japan. In 2024, the Thinking House continued to build on Cultivate to include SPARK, its innovation and inspiration programme, using Cultivate to design in-field missions and strategy workshops.

In essence, the Thinking House aims to bridge the gap between producers and consumers, enabling Irish businesses to create relevant, valuable, and successful products in a competitive world by focusing on consumer needs and global market dynamics.

5.2 Scotland Food & Drink's Knowledge Bank

The food and drink sector is Scotland's biggest employer, and the industry is worth c. £19 billion.

Scotland Food & Drink aims to nurture, support and champion the people and products of Scotland's food and drink industry to help deliver continued and growing success and enhance Scotland's global reputation. It performs that task in two ways:⁴⁹

- One, it is a **membership organisation with over 450 businesses** to engage with and encourage.
- Two, it **leads the Scotland Food & Drink Partnership**, a collaborative alliance of key industry organisations and public sector agencies.

Its ambition is for Scottish food and drink to continue to be a powerhouse of the Scottish economy while staying firmly ahead of its competitors. To be a world leader in sustainable food production, to build its reputation as a world-class producer and, above all, to grow profitably and responsibly.

It states that its support is flexible and wide-ranging, and designed to cater for every level and every business. Its support is categorised under the following headings:⁵⁰

Growth	The organisation advises that it has pooled together a network of skills, specialists and resources (including business development managers from different markets, cultures and countries) to fuel growth, improve stability and increase profitability. It states that it can provide businesses (regardless of size or stage of development) with the latest and most relevant insights and trends, facilitate new and lucrative commercial opportunities, develop commercial skills, and create an operating environment that fosters growth. It forges connections that help its members and the industry thrive. It matches buyers with producers, ideas with innovators, and products with markets. Its market development team guides businesses that are: • Searching for a new route to markets. • Needing to get in touch with buyers. • Unsure about sales opportunities. It states that its unwavering focus is on helping Scottish businesses grow by attracting and developing new commercial opportunities in Scotland, the UK, and internationally. A review of the organisation's website indicates that several forms of interrelated support are provided under the heading of 'Growth', one of which is the Knowledge Bank.
Policy	The organisation's policy work is dedicated to helping food and drink businesses in Scotland, with two key aims. Firstly, to understand what businesses across the industry need to achieve responsible growth. Secondly, to work constructively with decision makers across the food and drink landscape, including the UK and Scottish Governments, to meet those needs in a way that fits Scotland's social, economic, and environmental objectives.
Supply chain	This support aims to help businesses save money on distribution, energy, packaging, technical and utilities. It does this through work with an extensive network of partner organisations and affiliate members, each one offering its own specialist expertise.
Digital & technology	Scotland Food & Drink aims to help its members harness the power of digital innovation and develop operational excellence. It supports businesses to invest in technology, automation and data to make them more productive, more competitive, better placed to cut emissions, and less vulnerable to labour shortages.

⁴⁹ <https://foodanddrink.scot/our-industry/our-role/>

⁵⁰ NB This section provides a brief summary of the support available to food and drink businesses from Scotland Food & Drink. The Evaluation Team recommends that the reader visits the organisation's website to understand the full scope of support and its interrelatedness.

Skilled workforce	The organisation is working to position food and drink as an industry of choice, to support the attraction and retention of talent. This remains one of the industry's biggest challenges. Consequently, it is building a compelling proposition of the diverse range of jobs and careers available within the industry. Through this initiative, it aims to ensure a talent pipeline of recruits for Scotland's food and drink businesses.
Net zero & the environment	The Net Zero Commitment programme delivers targeted interventions to help the industry collectively meet those commitments. The programme provides leadership, advice and practical support to food and drink businesses, wherever they are on their Net Zero journey.
Funding	The organisation helps businesses to uncover funding available to them.

The cost of membership and associated benefits vary based on the tier of membership (please see Appendix X for full details, with summary details featured in Table 5.1). **However, all members and affiliates receive “unlimited access to the industry insights platform, The Knowledge Bank”.**

Table 5.1: Membership & Affiliates Summary		
Categories		Annual fee
Membership Tier	Startup - The Startup Membership is open to businesses in the first 12 months of trading only, with an annual turnover of up to £100,000.	£120
	Micro - The Micro Membership is open to businesses with an annual turnover of £100,000 to £300,000.	£345
	Emerging – The Emerging Membership is open to businesses with an annual turnover of £300,000 to £1million.	£720
	Scaling – The Scaling Membership is open to businesses with an annual turnover of £1million to £5million.	£1,430
	Accelerating – The Accelerating Membership is open to businesses with an annual turnover of £5million to £15million.	£2,140
	Strategic – The Strategic Membership is open to businesses with an annual turnover of £15million+.	£3,300
	Hospitality – The Hospitality Membership is open to businesses of all sizes.	£120
Affiliate Membership	Small – The Small Affiliate Membership is open to businesses with an annual turnover of £1million.	£720
	Medium – The Medium Affiliate Membership is open to businesses with an annual turnover of £1million to £5million.	£1,430
	Large – The Large Affiliate Membership is open to businesses with an annual turnover of £5million	£2,140

The organisation employs several metrics to measure the success of its activities and supports, including:

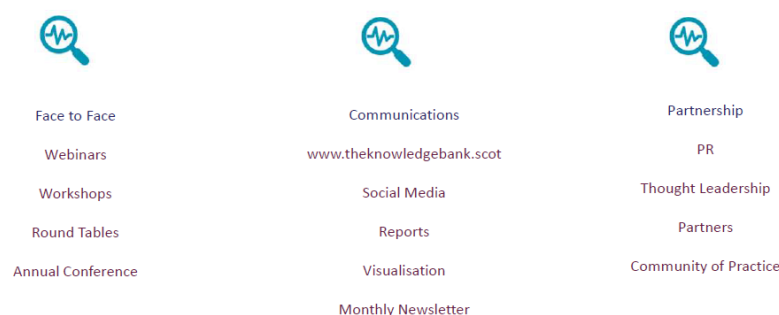
- Productivity – increase in Gross Value Added (GVA) and investment in research and development, leading to increased automation.
- Reduction in emissions – the industry is on track to achieve Net Zero by 2045.
- New entrants – the number of new businesses being created and the overall survival rate.
- Industry growth – increase in industry turnover.
- Investment – increased investment in critical areas of infrastructure.

Scotland Food & Drink describes **the Knowledge Bank** as being a comprehensive, free-to-access insight service that gives businesses access to a unique and effective blend of customised market research, data analysis and consumer insights. It suggests that it is a means to power business growth by giving businesses access to unrivalled insight and analysis to help them unlock commercial success in home markets or exports.

The Knowledge Bank covers everything from using intelligence to inform strategy, identifying new routes to market and developing resilient supply chains. Scotland Food & Drink considers that with all of that at their fingertips, businesses will have the facts they need to identify where the best opportunities are to sell more or sell more profitably. Aspects of ‘Knowledge Bank’ activity are noted as including:

- The provision of insights into consumer trends and shopper behaviour.
- Intelligence on markets, sectors and categories.
- Webinars, reports and presentations.
- In-person events discussing the latest trends and insights.

How will The Knowledge Bank work?



The sources of information that the Knowledge Bank works with are similar to those used by the FDCI Service:



Scotland Food & Drink notes that the Knowledge Bank is **made possible with support from the Scotland Food & Drink partnership and funding from the Scottish Government.**

Distinct from the Knowledge Bank (but the two services work together), Scotland Food & Drink offers a suite of training programmes to help businesses thrive through its Academy service. The Academy aims to:

- Aid businesses’ understanding of channels and customers
- Provide businesses with expert support to make strategic decisions
- Show businesses how to unearth relevant insights in market, customer and category data
- Teach businesses how best to position and strengthen their brand
- Demonstrate how to build trading relationships and negotiation skills with buyers
- Improve businesses’ long-term business plan and help them prioritise next steps.

Programmes are grouped into three key areas:

- **Seeding Growth** is geared toward early-stage businesses or those towards the start of their growth journey to drive sales and opportunities beyond their local market.
- **Accelerating Growth** is for SMEs with aspirations to enter the next phase of growth and will help identify and unlock opportunities to increase penetration and sales in UK markets.
- **Commercial Excellence** is for highly ambitious commercial professionals and sales leaders in well-established businesses looking to achieve significant market growth.

5.3 Food & Drink Wales' Insight Programme

The Welsh Government's Food Division is responsible for promoting Welsh Food and Drink in Wales, the UK and internationally.

Food & Drink Wales' Action Plan 'A Vision for the Food & Drink industry from 2021' sets out a vision *'to create a strong and vibrant Welsh food and drink sector with a global reputation for excellence, having one of the most environmentally and socially responsible supply chains in the world'*. The Action Plan's success measures include:

- The number of businesses in the sector.
- Revenue growth in the Welsh food foundation sector.
- Increases in the three-year average of Gross Value Added (GVA) per hour worked in Wales' food foundation sector.
- Export value.
- Total employee numbers.

The Welsh Government and its partners provide a range of programmes and projects to support the Welsh food and drink industry, enabling businesses to grow and remain sustainable. Some of these programmes and projects offer financial aid, others advice, while some offer the chance to join collaborative partnerships which open up opportunities to experience best practice and new ideas. The categories of support available are:

1. Business & Funding Support
2. Skills & Training
3. Flagship Events

Amongst the Business & Funding Support strand of activity is the **Market Insight Programme**, which provides Welsh food and drink businesses with the latest market intelligence and insight to understand the **grocery retail and out-of-home foodservice markets** in Wales and GB to inform decision making. The programme also provides **export market insight covering 50 countries worldwide**. In addition to market data, the Insight programme explores **future trends and insights** to help Welsh businesses shape their plans to meet changing customer and consumer demands.

The Insight Programme **purchases data** from providers such as Kantar, CGA, Euromonitor International, IGD, and Thefoodpeople. Access to data and analysis covers:

- Category performance data across 300+ Food and Drink sectors.
- Out of home market review of GB vs Wales.
- Retail topline category reviews of GB vs Wales.
- Out of Home drinks data provides a review of Wales and GB on-trade sales.
- Export market global database covering 50 countries for food and alcohol.
- Future food and drink trends presentations.
- Future food trend database sharing global innovation.

Part of the aim of the Programme is to **help companies realise the value of insight and encourage them to invest in their own data and insight in the longer term.**⁵¹

The Market Insight Programme can be accessed by registering to access the Member's Area. Members have exclusive access to:

- An extensive library of consumer and shopper reports providing a wealth of tips and insight into the retail and out-of-home market.
- Insight from world-class data partners, including Kantar Worldpanel and Kantar Consulting, The Institute of Grocery Distribution (IGD), CGA by NielsenIQ, Thefoodpeople and Euromonitor.
- Access to materials from the Insight Programme's Annual Conferences.
- Further retail and research projects undertaken by the Food and Drink Wales, e.g. Value of Welshness series of work.

Findings from an independent evaluation of the Insight Programme conducted by Promar International in 2023 found:

- Over 80% of respondents said they had seen some increase in business turnover.
- 68% stated they gained up to an additional £0.5 million turnover in the last 3 years.
- It especially highlighted the unique 'Value of Welshness' body of work, initiated and delivered by the Programme.

Other Business & Funding Support offered by Food & Drink Wales include the following:

Cluster Network	The Welsh Government, working with the food and drink sectors, have strategically put together several Cluster Groups: • Fine Food • Drinks • Seafood • Nutri-Wales • Horticulture • Sustainability • Export • Honey • CEO clusters for North and South Wales These clusters have been developed to maximise economic growth within Wales and also to respond to sectors that need direct Welsh Government support. They bring together like-minded people, with the key objective of helping businesses achieve accelerated growth in sales, profit and employment. Clusters will provide a business with support and "know-how" and enable it to develop opportunities to work with other suppliers, offering solutions to overcome the obstacles to growth, and to exploit commercial opportunities, as well as helping to develop its capacity and capability.
Cywain Programme	The Cywain Programme offers high-quality support to food and drink producers, from start-ups to micro, small and medium-sized businesses. Cywain assists food and drink businesses of any size at all stages of their development, and their experts can put tailored packages together to help the business' operation grow and be more profitable. It starts with a diagnostic of the business and its needs. From there, it offers a range of support, which might include: • Introducing the business to industry contacts and helping to strengthen links between the business and the supply chain. • Help with product development. • Access to tools, mentors and resources that will help the business to scale up. • Marketing and business strategy advice, including access to the latest research for their sector.

⁵¹ Data providers are contracted to provide data to Welsh Government for the Insight Programme on the understanding that it will be shared with, and used in business support for, the benefit of Welsh Food and Drink companies with head offices in Wales only. Data is owned by Welsh Government. Copyright is owned by the data providers, and any misuse puts future access to data in jeopardy.

Trade Development Programme	The Trade Development Programme helps food and drink businesses to grow and create jobs by addressing skills and competency gaps. Specific programmes address those skills and competencies gaps that may exist within a business. There are several elements to the programme, including: • The Retail Plan includes background on various opportunities and challenges facing Welsh food and drink businesses. • Trade Development Support currently runs a number of webinars aimed at providing practical knowledge to help businesses develop. • Meet the Buyer events bring in major food and drink retailers, wholesalers and independents. • It provides an insight into purchasing requirements and provides unique opportunities to boost sales. • The Commercial Skills Programme addresses gaps in business skills and competencies, developing professional commercial management standards within the industry.
Foodservice programme	The overall objective of the Foodservice Programme is to support Welsh Food and Drink businesses to grow and create jobs by securing contracts in regional (Wales) and national (UK) markets. The Foodservice Programme includes Welsh and UK foodservice, hospitality and wholesale sectors, to include Welsh and UK multiple chains and also independent establishments. As well as providing direct support to Welsh businesses, the Foodservice Programme will also develop strong networks and relationships with the Food and Drink foodservice sector.
Protected Food and Drink Names	Getting a business' Welsh food or drink product recognised under one of the UK's Geographical Indication (GI) schemes can give it invaluable protected status. It confirms that it's a unique product, only produced in Wales. The UK GI schemes, established following the UK's exit from the EU, cover: • food, drink and agricultural products. • spirit drinks. • Wine. • aromatised wine. The Welsh Government is actively seeking to extend the portfolio of Welsh food and drink products which already have the UK GI marque, providing expert advice on how to qualify and apply for a place on this prestigious list.
Export Programme	The Welsh Government can offer one-to-one support if a business is considering exporting as a way of increasing its turnover and profits. This can include support to develop an export strategy through to advising on the details of any financial and local tax issues, export procedures, regulations and logistics, even briefing on local language requirements and cultures.
Investor Ready Programme	Financial advice and guidance are on offer from the Investor Ready Programme, designed to improve financial expertise, giving a better understanding and control of day-to-day operations and aiding the business when making significant business decisions.
Project Helix	Project HELIX is a pan-Wales initiative delivered by Food Innovation Wales, a partnership of three food centres based in Anglesey, Ceredigion and Cardiff. It supports Welsh businesses to develop innovative products from concept, design, development and manufacture, through to the consumer's shopping basket, helping businesses grow and thrive.
Scale Up Programme	The Scale-Up Programme is there to help a business take its operations to the next level by developing a long-term strategic approach to growth.

Food & Drink Skills Wales hosts numerous events and workshops throughout the year, including the Insight Conference, which provides Welsh food and drink businesses with the latest insight to understand the grocery retail and out-of-home foodservice markets in Wales and GB.

5.4 Summary Conclusions

Across Bord Bia's Thinking House, Scotland Food & Drink's Knowledge Bank, and Food & Drink Wales' Insight Programme, there are commonalities as to what 'good' market intelligence support looks like for food and drink businesses, including:

- A blended supported offer, not just a data portal. Each of the three combines the use of paid-for data sources, analysis and interpretation, and capability building, rather than simply providing raw datasets. This is reflected in the production of curated reports, trend briefings, webinars/events, and some form of advisory or programme support.
- There is a strong emphasis on consumer insight and trends. Each support positions consumer needs, behaviours, and future trends as central to commercial success (innovation, NPD, branding, positioning), not an optional extra. Bord Bia is especially explicit about starting and ending with the consumer; Wales and Scotland similarly promote a focus on consumer/shopper insight and trends.
- The focus is on decision-useful outputs. The three benchmarks aim to convert insight into practical business decisions: where to trade (markets/categories), how to win (product proposition/branding/innovation), and how to sell (routes to market, buyers, channels).
- Each offers a combination of a self-serve library and one-to-one support.
- Each sits within (or is enabled by) a wider food & drink specific ecosystem, including government support, industry partnerships, and complementary programmes (training academies, clusters, innovation supports). This likely serves to make insights more actionable through direct access to other related supports. This is an important point in the context of the FDCI Service, as many of the beneficiaries appear (in the absence of specific monitoring) to be non-Invest NI clients, yet no tracking is undertaken of the businesses after they receive insight support. A high-performing market intelligence support should be clearly designed within a service ecosystem with a clear 'insight-to-action' pathway articulated.

Perhaps the most noticeable difference to the FDCI Service is a more pronounced thought leadership role and the creation of sector narratives. Whereas, for the most part (with key exceptions being Insight events and the Annual Conference), the FDCI Service has been created to respond to business requests, the benchmark projects more actively seek to shape the agenda through proactive publications, trend work, and thematic studies (e.g., Bord Bia's topic reports; Wales' "Value of Welshness"; Scotland's wide trend/insight coverage). Added benefits of this approach are its ability to reach more businesses within a sector/sub-sector on a timely basis, and its ability to 'sweat the data assets' that are one of the key cost components of the respective services.

It is notable also that Bord Bia's Thinking House is further developing this approach by actively seeking to develop its own AI tools to facilitate the rapid trawl, analysis and interpretation of the data at its disposal.

6. CONCLUSIONS & RECOMMENDATIONS

This section sets out the Review Team's conclusions and recommendations, aligned, where possible, with the requirements of the evaluation's specification.

6.1 Conclusions

6.1.1 *Overarching Conclusion*

The FDCI Service was established in November 2018 in a somewhat organic manner, meaning that its development has been somewhat piecemeal and subject to a very high number (93) of business cases during the 6 years under review. Its purpose is to promote, embed and enable the strategic use of data and insight to stimulate innovation and drive the growth and competitiveness of NI's food & drink industry.

To that end, the FDCI Team identifies and procures a variety of consumer, retail, and market data to support business development, marketing, and new product development initiatives through a series of offerings that are provided on either a one-to-one or one-to-many basis.

Of note is that the Service does not solely cater for Invest NI client businesses, but also many food and drink sector businesses amongst NI's wider business base. As well as Invest NI clients and other wider business base beneficiaries, the data procured by the FDCI Team is used by the Invest NI food business development team and the sector client team to assist in the appraisal and evaluation of projects and to keep them fully up to date with current food and drink trends.

This evaluation has demonstrated that whilst there is scope for further refinement and enhancement, the Service is very highly valued, performing strongly on satisfaction and advocacy amongst participants and stakeholders. It has been particularly successful in supporting businesses to take data-driven decisions to innovate, enhance their competitiveness and achieve business growth.

6.1.2 *Achievement of Objectives*

During its first 5 years of activity (up to March 2024), the FDCI Service did not operate under a system of annual or multi-annual business cases. Instead, in each of those years, multiple business cases were developed for different strands of activity, the sum of which in each year is not equivalent to the totality of the Team's activity or costs. Indeed, during the six years under review, 93 individual business cases were developed by the Team, meaning that Business Case development and approval has become, inadvertently, a team 'activity'. It was not until the 2024/25 financial year that the Team developed a one-year business case that sought to encompass the Team's anticipated activity and costs for that year.

Consequently, whilst each of the business cases features general aims or ambitions (but in most cases do not feature SMART objectives), they are for small operational aspects of an overall 'Service'.

Separate from the individual business cases developed, the FDCI Service developed annual service-level targets (as reflected in Table 2.9), but for the most part, these are activity-based, as opposed to being output or outcome-focused.

The Evaluation Team notes that a clearer focus on outputs and outcomes (rather than inputs and activity) will require considerable enhancement in the FDCI Service's objective-setting methodology and its approach to monitoring.

6.1.3 The Original and Ongoing Rationale for the FDCI Service

The FDCI Service contributes to policy and strategic goals within the Minister's Economic Vision, Invest NI Business Plan 2024-27 and the outcomes of the Invest NI Independent Review, as follows:

- Concerning the Minister's Economic Vision, the Evaluation Team notes the following:

Table 6.1: Contribution to Minister's Economic Vision Priorities	
Priority	Discussion
Priority 1: Increase the proportion of working-age people in good jobs	A minority (13%, N=68) of respondent businesses indicated that they had achieved employment growth as a result of the support received through the FDCI Service. The Evaluation Team's grossing-up analysis suggests that the FDCI Service has helped to create 52 gross FTE jobs, or 23 net additional FTE jobs.
Priority 2: Promote Regional Balance	The FDCI service is open to all Food & Drink processing businesses throughout NI and at every stage of development, from entrepreneurship to indigenous business growth to export growth and foreign direct investment. Where known, 72% of unique recipients of support through the service have been located outside the BMA (see Table 2.6).
Priority 3: Raise Productivity	26% (N=68) of survey respondents reported achieving increased productivity/efficiency as a result of the support received through the FDCI Service.
Priority 4: Reduce Carbon Emissions	The service provides information on consumer attitudes and behaviours relating to sustainability. Sustainability was also the focus of the 2021 annual seminar.

- The Service supports several Invest NI's strategic priorities (Driving Global Ambition, Boosting Business Investment, Accelerating Innovation & Skills, Driving & Achieving Sustainability and Promoting Places and Partnership) through the provision of market information (including throughout NI in conjunction with regional colleges), supporting business decision-making and leading to new product development, listings and external sales.
- The Service supports the Independent Review's recommendation for Invest NI to proactively share economic and market intelligence with policy makers and key stakeholders in Northern Ireland.
- The Independent Strategic Review of the NI Agri-Food Sector 2022 (DAERA) highlights *"a need for intervention in developing greater awareness of market intelligence (provided by the likes of Euromonitor, IGD, Kantar and Mintel) among start-ups and SMEs. This will help them tailor their selling and marketing strategies more effectively. Invest NI's Food and Drink Division is actively working on this through its Consumer Insights team, but we would recommend a review of Invest NI's market intelligence and consumer insights capacity, to ensure that it is adequately resourced and ready to lead NI agri-food in this direction, particularly given the pressing need to look beyond GB for future sales growth."*

Given the above, and the continuing expectation amongst retail and foodservice buyers that food and drink suppliers would validate their listing and growth proposals with market research and shopper data, there continues to be an ongoing rationale for the FDCI Service.

6.1.4 Overall Economic & Wider Impacts

The FDCI Service has successfully achieved a variety of monetary and wider/regional economic impacts:

- There are strong reported business outputs and outcomes, including strengthened customer relationships (75%), gained new customers (65%) and improved approach to NPD (62%).
- Strengthened their relationship with an existing customer(s) (75%, N=68)
- The FDCI Service may have directly:
 - Contributed in the region of c.£4m in net additional GVA to the NI Economy to date, with an additional net additional GVA of £12.3m anticipated over the next two years.
 - Created approximately 23 net additional FTE jobs
- In addition, respondents reported several other impacts as a result of the receipt of the FDCI Service support, including:
 - Increased competitiveness (54%, N=68)
 - Improved the skills of their workforce (29%, N=68)
 - Increased productivity/efficiency (26%, N=68).

6.1.5 Economy, Efficiency & Effectiveness

In considering the economy, efficiency and effectiveness relating to the FDCI Service, we note the following:

Table 6.2: Economy, Efficiency & Effectiveness Indicators	
Indicator	Evaluation Team's Commentary
Economy measures are concerned with showing that the appropriate inputs (i.e. the resources used in carrying out the project) have been obtained at least cost.	Concerning the FDCI Service, economy likely relates to buying inputs (data, tools, expertise) at the least cost. Per Table 3.7, delivery costs for 5 of 6 years (excl. 2022/23) were below the funding approved within the business cases.
Efficiency relates to measures that are concerned with achieving the maximum output from a given set of inputs.	For the FDCI Service, efficiency relates to converting those inputs into high-quality insights and support at a low unit cost. The FDCI team supported 304 unique businesses through delivering the various strands of the service (including 561 RDSs, 42 events and 115 MI Clinic business participants, etc.) across the period under review. The service also received high qualitative feedback, with 97% (N=68) of respondents satisfied with the support and 99% (N=67) reporting that the information received was of value to help them achieve their growth plans (99%, N=67). However, arguably, more output may have been achieved had the Service sought to adopt a different approach to business case development than what was implemented for much of the period under review.

Table 6.2: Economy, Efficiency & Effectiveness Indicators	
Indicator	Evaluation Team's Commentary
Effectiveness measures are concerned with showing the extent to which the aims, objectives and targets of the project are being achieved.	In the context of the FDCI Service, effectiveness relates to the achievement of measurable business outcomes (sales growth, innovation) influenced by the service. Participant feedback provides strong evidence to indicate that the purpose of the FDCI Service is being achieved, with 54% of respondents reporting increased competitiveness and 62% reporting increased sales to date, increasing to 81% anticipating additional sales over the next 2 years. However, as reflected in Section 1.2.2, for most of the period that this evaluation covers, the Service has operated without a stated strategic aim(s) or meaningful strategic SMART economic development objectives. Thus, the Evaluation Team is unable to fully conclude on its effectiveness.

6.1.6 Return on Investment & Value for Money

Based on the Evaluation Team's estimate of the full economic cost (£3,771,720)⁵² of the Service and the actual net additional GVA contributed to the NI economy (£3,974,303), the minimum return on investment delivered by the FDCI Service over the period April 2019 to March 2025 is £1.05 for every £1 invested. However, if the anticipated benefits are achieved, the return on investment could increase to £4.32.

The Evaluation Team notes that a Value for Money (VfM) indicator was not established for the Service. However, it is the Evaluation Team's view, based upon all available evidence, that the FDCI Service delivered VFM in respect of the costs incurred during the period under review.

6.2 Recommendations

The Evaluation Team's key recommendations relating to the FDCI Service are detailed below:

1. The FDCI Service should consider options, within the structure of a Business Case, relating to what the Service should be. The focus of this should start with business decisions, not data products. For example, the Insights Service could structure the service around the decisions food and drink sector businesses routinely need to make, such as:
 - Which category/segment to target next?
 - Which channel (retail, out-of-home, export) is the best growth route?
 - How should the business price/position/package?
 - What market trends are most prominent, and what should the business innovate?

The Evaluation Team notes that this is reflective of how the three benchmark supports frame insight as a route to growth and competitiveness.

⁵² Inclusive of delivery costs, costs associated with BIC procured data platforms and staff costs.

Further option considerations, in a constrained resource environment, might relate to:

- The segments of the market that the service supports, and their relative contribution to economic growth vis-à-vis wider strategic imperatives.
- Segmenting users and personalising their journey. For example, design access pathways for:
 - Startups/micro (need simple guidance, templates, and curated insights).
 - Scaling SMEs (need category/channel strategy, pricing, buyer readiness)
 - Established exporters (perhaps more of a need for deep market intelligence, competitor/context scans).

For reference, see Scotland's tiering and Bord Bia's differentiated service offering.

- The composition of FDCI Team activities and the design of the Service. For example, there may be merit in tiering support in layers such as:
 - Self-serve: searchable library, dashboards, recorded webinars, templated toolkits.
 - Guided: clinics, thematic briefings, workshops.
 - Bespoke: deeper category/consumer work, proposition/innovation validation, tailored searches (librarian-led research).
 - How best to build capability in data analysis and interpretation, not dependency amongst food and drink sector businesses, aiming to embed learning so businesses can progressively self-serve more effectively.
 - Bord Bia's physical Thinking House reflects the power of convening. Even without a physical space, the FDCI Service could replicate aspects of that through:
 - Curated peer roundtables by subsector (dairy, bakery, drinks, etc.)
 - Innovation showcases and packaging/branding exemplars.
 - Meet the Buyer insight-led preparation sessions.
2. Ensure that the Service is designed within a wider service ecosystem with a clear 'insight-to-action' pathway articulated, so that tracking of businesses is possible following the receipt of insights.
 3. Related to Recommendation 1, the Service's monitoring requires a considerable overhaul, focused on the outputs and outcomes of the Business Case's Preferred Option activity, establishing the focus of support provided to beneficiaries and appropriate baseline positions, enhancing the profiling of beneficiaries (in line with Invest NI segmentation categories, but also food and drink sector specific categorisation), and ensuring that monitoring and reporting captures the unique number of participant businesses in a given period, dataset utilisation rates etc.
 4. Concerning the ability to self-serve, it is noted that, at present, the Insights Hub is not particularly user-friendly and requires investment to move it from being simply a (growing) repository of data/market information to a meaningful and searchable source of market insights e.g. searchable by Market (NI/UK/ROI/export markets), Channel (retail, out-of-home), food and drink category, business task (NPD, brand development, meet the buyer preparation etc.).
 5. Whilst there may be resource implications, explore whether the FDCI Service should adopt a more pronounced thought leadership role, alongside the creation of sector narratives and horizon-scanning activities. The potential added benefit of this approach is its ability to reach more businesses within a sector/sub-sector on a timely basis, and its ability to 'sweat the data assets' that are one of the key cost components of the FDCI Service.

6. Whilst there may be resource implications, the feedback received indicates that there is considerable scope to increase awareness of the Service. This might be achieved through the creation of regular/predictable ‘touchpoints’ that drive engagement (aligned with Recommendation 5), such as:
 - Monthly trend/market pulse.
 - Quarterly category deep-dives.
 - The annual flagship conference.
 - Buyer/channel briefings.
7. Explore how the FDCI Service should adopt AI tools to facilitate the rapid trawl, analysis and interpretation of the data at its disposal.
8. Given that it is only food and drink sector businesses that utilise Invest NI’s Mintel data, move the Mintel contract from the BIC team to the FDCI team.
9. Consider further investment in Invest NI’s physical research centre space to make it a more comfortable space for businesses to undertake research and to collaborate with the FDCI Team.

Appendix I – Evaluation Objectives

Invest NI's Terms of Reference advise that the Evaluation must be undertaken in line with national and regional requirements. It must be compliant with Central Government guidance, including:

- The Green Book: Appraisal and Evaluation in Central Government, Current Edition, HM Treasury.
- The Northern Ireland Guide to Expenditure Appraisal and Evaluation (NIGEAE), Current Edition, Department of Finance.
- The Magenta Book: Guidance for Evaluation, Current Edition, HM Treasury, and
- Invest NI Economic Appraisal Methodology (EAM) guidance.

The evaluation must address equality considerations, taking into account the requirements of Section 75 of the Northern Ireland Act 1998, the Disability Discrimination Act 1995 and the Rural Needs Act (NI) 2016.

The objectives of the FDCI Evaluation are as follows:

- To set out the objectives of the FDCI service and assess the extent to which they are **meeting their stated objectives and all associated targets**.
- To review the validity of **the original and ongoing rationale for the FDCI service**, including the nature and scale of the **market failures** that they are seeking to correct; this will include a **summary list of other similar services delivered by other Stakeholders**.
- To thoroughly assess the inputs, outputs, outcomes and impact associated with the FDCI service, to include a detailed assessment of the **overall economic and wider impacts** of each.
- To identify the internal and external **factors which have impacted upon the performance** of the FDCI service either positively or negatively, within the period 1st April 2019 to 31st March 2025.
- To **determine the Return on Investment** associated with the FDCI service, clearly identifying actual and anticipated values where possible.
- To assess the **economy, efficiency and effectiveness** with which public funds have been used on FDCI service.
- To assess the extent to which the FDCI service represents good **Value for Money (VFM)** and appropriate use of public funds across the full spectrum of relevant VFM indicators.
- To **compare the support offered** through the FDCI service against equivalent services available to businesses in the Republic of Ireland, Scotland and other regions of the UK.
- To present a **succinct set of conclusions** from the Evaluation, taking into account all of the evidence gathered during the assignment.
- To **consider the merits of Invest NI continuing to fund this service**, including an assessment of whether the strategic context remains valid and if the need and demand still exist.
- The evaluation should **consider the Minister's Economic Vision**, Invest NI Business Plan 2024-27 and the outcomes of the Invest NI Independent Review.
- If this assessment is positive, identify **recommendations** as appropriate in relation to, for example, the participant profile, strands of activity, delivery model, and the ongoing monitoring of the Service, etc., with a view to enhancing the economy, efficiency and effectiveness of the Service. The recommendations should be numbered and concisely worded and be Specific, Measurable, Achievable, Relevant and Time-Bound (SMART) where possible/relevant.
- Assess the **merits of the programme** and **whether it should be delivered as a Business Support programme that is fully integrated within Invest NI's Food & Drink Division**.

Appendix II - Business Case Development Activity

Year		Mar-20	Mar-21	Mar-22	Mar-23	Mar-24	Mar-25
No. of Business Cases in the Year		19	11	15	20	17	11
Insights Academy	Dunnhumby UK Who Buys My Food? (WBMF)						
	Dunnhumby Ireland Incubator Programme						
	Institute of Grocery Distribution (IGD) Video Tutorials						
	Growth Through Insights (GTI) Programme						
Data Purchase	Foodservice - MCA (Market, Consumer, and Analysis) Membership						
	Food Spark						
	Vypr - Primary Research						
	Retail - Institute of Grocery Distribution (IGD) Corporate Membership						
	Campden BRI Corporate Membership						
	Foodservice - Lumina Corporate Membership						
	thefoodpeople (tfp) Trendhub						
	Global Trends - Globaldata						
	Meat & Dairy Sectors - Agriculture and Horticulture Development Board Corp Membership						
	Spirits sector - International Wine and Spirits Record (IWSR)						
	Kantar Consumer Panel						
	Market Reports GB - various providers.						
	Market Reports Ireland - various providers.						
	Foodservice - NielsenIQ (NIQ) CGA Reports						
	Foodservice - NielsenIQ (NIQ) CGA Report Addendum						
Events Activity	MI Workshop						
	TickEat						
	Fresh Product Workshop						
	Health & Wellness Seminar						
	Sustainability Seminar						
	Catering for CAFRE Alternative Foods Event						
	Cost of Living Seminar						
	Kantar Speaker Travel						
	Accommodation for Guest Speaker						
	FDCI Events Programme						
	Institute of Grocery Distribution (IGD) Guest Speaker Vending						
	Variation to the International Wine and Spirits Record (IWSR)						

Appendix II – Business Case Development Activity

Year		Mar-20	Mar-21	Mar-22	Mar-23	Mar-24	Mar-25
No. of Business Cases in the Year		19	11	15	20	17	11
Team Development Activities	Agriculture and Horticulture Development Board project planning						
	AV Browne Marketing Collateral						
	Institute of Grocery Distribution (IGD) Live						
	Institute of Grocery Distribution (IGD) Sainsbury Briefing						
	Institute of Grocery Distribution (IGD) Tesco Briefing						
	Institute of Grocery Distribution (IGD) Workshop						
	MCA Food To Go Conference						
	MCA Quarterly Review						
	FDCI (previously MRCI) Strategic Development Consultancy Support						
	Campden BRI Courses						
	International Food & Drink Event (IFE)						
	Institute of Grocery Distribution (IGD) Course						
	Institute of Grocery Distribution (IGD) & Farm Shop & Deli Show						
	Grocer Conference						
	Institute of Grocery Distribution (IGD) & Plant Based World Expo						
	Institute of Grocery Distribution (IGD) Shoppervista				2 Business Cases		
	Lumina Food Strategy Forum (FSF) & Study Tour						
	Lumina Food Strategy Forum (FSF)						3 Business Cases
	ScotHot -Scotland trade event for buyers in hospitality, foodservice, public sector, retail, leisure and tourism						
	Lumina Food Strategy Forum (FSF) Study Tour - July 2023 & December 2023					2 Business Cases	

Appendix III - Summary & Description of Data Sources⁵³

Source	Description
Market Intelligence	
Mintel	Widely recognised, world-leading market intelligence agency - market size, growth rates, category breakdown, demographics, trends, flavours, insight and innovation.
Euromonitor - Passport	Industry, economic, channel and consumer trends globally.
GlobalData	Granular industry intelligence, expert insight and analysis, global resource. Country profiles - societal & cultural.
Industry & Company Intelligence	
IBISWorld	Overview reports offering actionable insights, comprehensive data and in-depth analysis on thousands of global industries. Accommodation and Food Services
Plimsoll (not currently available)	Industry & Company analysis and benchmarking
Bureau Van Dijk - Orbis	Orbis is Bureau van Dijk's flagship company database, which contains information on around 400million companies across the world.
Frost & Sullivan (replaced by Hoovers)	Growth analytics, including market sizing and growth forecasting, global opportunity scanning
Sector and Technical Data and Insight	
Agriculture and Horticulture Development Board (AHDB)	A statutory levy board, funded by farmers, growers and others in the supply chain, to help the industry succeed in a rapidly changing world. Meat & Dairy Sectors. Consumer Insights Team/Knowledge Library. NI producers do not have the option to be levy-paying members of AHDB as legislation does not include NI in the levy area. Invest NI has developed this membership arrangement with AHDB to allow NI producers to have access and representation within AHDB. As the economic development agency for NI, Invest NI has negotiated this corporate membership to bring benefits to its own operations and those of NI producers.
IWSR	A trusted, accurate and widely used source for beverage alcohol trends in the world. Used to benchmark performance, identify market entry opportunities and stay on top of innovation for product development
Campden BRI	Member-based research organisation, specialising in manufacturing & ingredient technologies, food safety & legislation, product development, consumer & sensory analysis.
Channel Data & Insight	
Lumina Intelligence	Consumer and shopper data platform combines analytics and insight in the convenience and foodservice sector in the GB market. Eating & Drinking out monthly panel, Top of Mind report, Menu and Food Trends report, quarterly briefings.
CGA by Nielsen IQ	CGA works with food & drink suppliers, hospitality operators, trade bodies & financial institutions, providing market measurement & unique expertise across all parts of the On-Premises route to market. Electronic Point of Sale Data (EPOS) for market and category sizing, trends and performance metrics.
IGD Retail Analysis	Commercial analysis of food & drink retailers. Retail channel innovations, trends and insights. Retailer snapshots and strategic priorities.
Shopper, Consumer and Macro Trends Data and Insight	
IGD Shoppervista	Category and shopper insight. Consumer behaviour and sentiment. Category snapshots. Consumer response to macro trends.
Kantar UK and Ireland - MyWorldPanel	Consumer Panel Data FMCG. Analysis by category and retailer. Market size - volume and value, growth rates, trends, penetration, frequency, average price, volume per trip, volume per buyer.
The Grocer	Media publication. Regular category analysis, reports and articles. Conferences and seminars. Track innovation and trends in consumer behaviour and retailer strategies. Very cost-effective source of data and insight.
The Food People – Trendhub	Global Macro trends. Social & Cultural trends. Health watching, cuisine watching, food watching, drinks watching, menu watching, category watching, season watching. Innovation, flavours, ingredients, experiences.
Vypr	Quick response survey app to test consumer response to new concepts, packaging, price points, flavour variants, product names and descriptors. Nationally representative panels, breakdown by demographics, targeting, and responses within hours.
Statista (not currently available)	Statistical reports on a broad range of industries, companies, consumers, trends, countries, politics, and society, covering the latest and most important issues in a condensed format.

⁵³ Source: Invest NI FDCI Team Summary & Description of Data Sources 2025

Source	Description
Loyalty Card Data	
Dunnhumby for Tesco	dunnhumby Shop is a web-based platform that gives self-serve access to granular Shopper insights from Tesco, with SKU-level detail for flexible analysis.
Beet by Ocado	A self-serve platform that allows Ocado suppliers and buyers to view their sales data, promotions, customer behaviour insights and more. The platform helps suppliers to collaborate smarter with Ocado buyers as it allows both parties to view the same data and make impactful decisions together.
Nectar 360 for Sainsbury	Sainsbury's Insights Platform combines rich customer data with billions of rows of transactional data in an easy-to-use interface and is used by hundreds of internal colleagues and Sainsbury's suppliers daily.
Insights Expertise	
Insight Traction Knowledge Bank	Provides access to: Image Bank: In-store and online examples of great shopper execution across categories. Content Bank: Easy-to-digest pieces of content setting out how to win with shoppers. Blog Bank: Our full blog catalogue, giving our take on key topics in the FMCG world.
FD reviews	A team of industry experts reviews your product, category and market. You get a video review of your product that will give you valuable guidance for your next steps.

Appendix IV – Data Procurement Activity

The following data procurement has been undertaken over the last 6 years:

Table 1: Data Procurement						
Platform/Subscription Source	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
IGD Corporate Membership	✓	✓	✓	✓	✓	✓
Campden BRI Membership	✓	✓	✓	✓	✓	✓
Lumina Corp Membership (rebranded from MCA)	✓	✓	✓	✓	✓	✓
AHDB Corporate Membership	✓	✓	✓	✓	✓	✓
IWSR	✓	✓	✓	✓	✓	✓
dunnhumby WBMF (Why Buys My Food) (Sept 19-Aug 22)	✓	✓	✓			
Dunnhumby Ireland (incubator programme)		✓	✓			
Vypr		✓	✓	✓	✓	✓
The Food People (tfp) Trendhub		✓	✓	✓	✓	✓
Globaldata			✓	✓	✓	✓
Syndicated Consumer Panel Data: Kantar UK & Ireland				✓	✓	✓
CGA by Neilson				✓	✓	
Insight Traction						✓

Information drawn from individual business cases and Post Project Evaluation (PPE) reports prepared by the FDCI Team outlining data procurement objectives and suggested progress against the business case objectives is provided below.

IGD Corporate Membership (active since 2019/20)

Objective and FDCI's Team View on Achievement

To gain access to an up-to-date source of high-quality retail and consumer information, which could be used to support business development activity in GB and further afield. According to the FDCI Team, this objective was achieved, with the following usage figures reported.

Table 2: IGD Corporate Membership Usage Figures					
Usage Figures	2019/20	2020/21	2021/22	2022/23	2023/24
Invest NI users	19	13	11	11	12
RDS completed	34	86	66	72	86
Reports accessed	1,090	1,814	448	588	440
ShopperVista accessed	408	815	278	286	86
Retail Analysis accessed	682	999	562	302	100
Christmas Review webinar views ⁵⁴	113	N/A	N/A	N/A	N/A

The FDCI Team consider that both 'Retail Analysis' and 'ShopperVista' are essential platforms within the Consumer Insights Toolkit. By way of illustration, the Top 20 Retail Analysis and ShopperVista reports/data accessed in 2019/20 were as follows:

Retail Analysis Top 20	ShopperVista Top 20
Tesco hub/outlook	Health, nutrition & ethics
Food to go hub	Helping shoppers to make healthier choices
United Kingdom outlook 2018-2024	Exploring shopper behaviour when purchasing hot drinks
Asia hub	Health shopper priorities and changing attitudes to health
Tesco snapshot	Health, provenance and ethics
Retail trends	Social consciousness: shopper of the future series
Africa and the Middle East	Supermarkets and hypermarkets
Kantar: GB market shares	The Sainsbury's shopper journey
Asda hub	Defining health at the category level
Convenience	Health: All about the balance
France country profile	The Tesco shopper journey
Online Trends	Exploring shopper behaviour when purchasing bakery products
Sainsbury's hub	Food-to-go
Netherlands country profile	The insight before Christmas
Portugal country profile	Shopper behaviour when purchasing BWS
China hub	Shopper behaviour when purchasing chilled meats
Marks & Spencer outlook	Health, nutrition and ethics: where do food-to-go shoppers stand?
Waitrose welcomes the era of the mindful consumer	Portion size: shopper behaviour and use of nutrition labels
Auchan hub	Quarterly channel update – Q2 2019
Food to go trends in focus: health and wellness	What do shoppers think of new brands?

⁵⁴ Invest NI Staff & Clients

The FDCI Team has utilised the membership discount to avail of workshops, training courses and trade briefings during the subscription period, e.g. the “Turning Data into Insights” workshop, which the FDCI Team considers was invaluable in providing professional development to new team members. Other Invest NI staff (including members of the Food Business Development (FBD) Team, BIC Team and R&D Team) have also attended relevant workshops, training courses and trade briefings.

IGD also delivered webinars over the subscription period, on various topics including the retail market environment and on consumer and shopper behaviour (for example, on Christmas performance in the retail sector, cost of living, etc.).

The FDCI Team reports anecdotal feedback from Invest NI clients indicating that they have found the information to be invaluable to them in preparing for retailer presentations.

Invest NI made referrals to IGD, including:

- McColgans for Membership; and
- Punjana for Category Management Courses.

As a gauge of value for money, in the 2019/20 monitoring report, the FDCI Team noted that if the reports had been purchased from IGD individually, at an average fee of £250 per report, the cost would have been £111,750 excl. VAT. The subscription costs and IGD membership for April 2019 to March 2020 were £33,600 exc. VAT, a saving of 70%.

Campden BRI Corporate membership (active since 2020)

Objective and FDCI’s Team View on Achievement

To gain access to an up-to-date source of high-quality technical, consumer and sensory information and advice, which can be used to support the capability development of Invest NI teams and its Food and Drink sector client portfolio.

The FDCI Team advises that it sought to evaluate the effectiveness of the Campden BRI contract based on:

- The number and outcome of ‘shorter enquiries’ (unlimited enquiries for technical and regulatory advice and support) and of ‘longer enquiries/projects’.
- Guest speaker attendances.
- Invest NI’s participation in Member Interest Groups.
- Invest NI’s attendance at training and networking events.
- Access to research and technical information.

The FDCI Team considers that its objective(s) for this contract were achieved and reports the following activity.

Table 3: Campden BRI Corporate Membership Activity					
	2020	2021	2022	2023	2024
Short Enquiries handled to contribute to clients' RDSs	4	4	4	5	0
Longer Enquiries/projects	1 x Crust & Crumb project. A meeting which led to a TDI project	1 x Kombucha Tea project. Literature searches for the client.	1	2 Tsang Sauce for the use of Stevia in Cooking Sauces. Tom & Ollies for High Pressure Processing (HPP) testing – potential TDI from this referral.	0
Member Service Account (MSA) Utilisation: 20% of the membership fee is placed in an MSA at the start of each membership year. This can be used for longer enquiries, project work, services, guest speakers, training and Campden BRI publications.				MSA used for: 2 x Longer Enquiries (see above) - HPP Publication - Attendance at a Product Claims and Nutrition Labelling Course	Due to these unforeseen circumstances, the 2024 MSA balance was not used. Campden agreed to roll over the MSA into 2025's subscription to have credits available for further AFII projects in the calendar year 2025 and for participation in a packaging course.
Guest speaker appearances	0	Webinar on plant-based NPD for FDCI Sustainability Theme	0	0	0
Invest NI's participation in Member Interest Groups (MIGs) ⁵⁵	- Consumer and Sensory - Diet, nutrition & health	- Consumer and Sensory - Diet, nutrition & health - Cereals Milling and Baking - Red Meat			- Consumer and Sensory - Diet, nutrition & Health - Cereals Milling and Baking - Protein - Fermented and alcoholic drinks - Food & Drink Science - Sustainability.

⁵⁵ Exclusive access to these groups for networking, personal development and keeping up to date. There are 12 MIGS covering a broad range of topics from agri-food through processing and preservation to sensory and consumer issues. Full access to all the minutes of the meetings from the member only section of the Campden BRI website. Invest NI is co-opted onto the MIGs that they would like to attend.

Table 3: Campden BRI Corporate Membership Activity					
	2020	2021	2022	2023	2024
Other	TDI Projects assisted⁵⁶: - Crust & Crumb Bakery Ltd – development of low-calorie pizza. Campden contract value £8,520 (at member discounted rate) - Born Maverick Ltd – development of plant-based milks. Campden Contract Value £9,950 (at member discounted rate) Other projects under development included: - Roslyn Magee – shelf-life testing of cocktails - Glanbia Cheese – consumer and sensory response to different cheese string flavours in stuffed-crust pizzas.	Technical Advice provided to: - Born Maverick Ltd - led to an Innovate UK project on Plant-Based Milks - Whites Oats Other potential projects under development: - Linwoods - An Innovate UK project/Grant for R&D			
Attendance at training and networking events	The FDCI Team reports that it and other Invest NI staff members engage in: - Regular consultation of scientific and technical reports published by Campden BRI and monitoring of R&D trends through the Member's Research Programme. This covers food safety; food quality and value; food technology and functionality; nutrition, health and well-being; sustainability, resilience and food security; and food law. According to the FDCI Team, this provided an excellent reference source supporting the technical appraisal of R&D projects and often helped to steer project plans. - Attendance at webinars - Reading newsletters and alerts. The FDCI Team attended an online course in February 2024 on Product Claims and Nutrition Information labelling, paid for through the Member Service allowance. The course materials were shared with the F&D Division, TAU and IRTD Teams. Campden presented at Invest NI's Health & Wellness seminar.				

⁵⁶ These projects were delivered to Clients at a discounted rate of 25% due to Invest NI membership. This is a significant financial benefit to the Clients and Invest NI.

Table 3: Campden BRI Corporate Membership Activity					
	2020	2021	2022	2023	2024
Access to research and technical information (Full access to the research archive and early access to recently released R&D documents.	The FDCI Team reports that it has made extensive use of resources on the Members' area of the website, including on topics such as: • Covid (2020, 2021) • Packaging • EU Exit – food legislation harmonisation • Health & Wellness (since 2021) • Sustainability (since 2021) • BRC (since 2022) • Labelling (since 2022) The FDCI Team considers that the scientific knowledge, practical experience, especially in the area of HACCP, BRC and specialist testing, and legal advice to be excellent. A publication on High Pressure Purchasing was purchased in 2023 using the Member Service allowance to support Tom & Ollie's proposal to extend shelf-life for GB market entry using this processing technology.				

In addition to the FDCI Team, other Invest NI Teams made use of the Campden BRI subscription. The monitoring reports highlighted the following benefits to other Invest NI Teams:

Invest NI's IRTD Team	The Team regularly consulted scientific and technical reports published by Campden BRI and monitored R&D trends through the Member's Research Programme. Information was available on topics such as food safety, food quality and value; food technology and functionality; nutrition, health and well-being; sustainability, resilience and food security; and food law. This was used to support the technical appraisal of R&D projects and to steer project plans.
Invest NI's Technical Advisory Unit (TAU)	Access to scientific knowledge and practical experience, especially in the areas of HACCP, BRC, specialist testing and legal advice. Also, given EU Exit-related issues with regard to exporting and importing food/drink and ingredients/packaging, it was considered important to have access to this information resource.

dunnhumby WBMF (Why Buys My Food)

The University of East Anglia (UEA) had a longstanding relationship with Dunnhumby and was given access to the Tesco Clubcard data at a substantially reduced cost. Through the research project 'Who Buys My Food', information is collated from food producers through an online survey. This results in a Shopper Insight Report which details a number of key findings for the food company about how their products are performing within Tesco and suggests remedial action which they may need to take.

The Dunnhumby dataset is considered to be one of the most valuable data sources in the UK, as it covers the food purchasing behaviour for 40% of the UK population. Through WBMF, NI food producers with a turnover of <£6.5m were able to access this free of charge, with the added value of having the data interpreted for their product lines. This project was considered to be a unique partnership between UEA and Invest NI, which provided the only vehicle, at the time, for NI food producers to access Dunnhumby market intelligence, complete with the expertise to interpret it and other relevant forms of market intelligence in a way that delivered support to develop the core skills necessary to exploit potential market opportunities.

The project plan was also to deliver four workshops and four practitioner webinars for NI food producers each year to help them understand and embrace the consumer insight data.

To deliver this project, one full-time post-doctoral research assistant at UEA was to be employed. This person was to be responsible for the generation of insight (which suppliers accessed via the web application), responding to ad-hoc questions about the insights provided (their interpretation and application) and the generation (research and writing) of the case studies. The post-doctoral research assistant was also anticipated to be responsible for the organisation of the webinars and any additional research required for the sector workshops.

The Dunnhumby 'Who Buys My Food' contract (3-years) started on 1 September 2019 (delayed from April). However, due to the delay in getting the contract in place, UEA was not able to recruit a Post Doc Research Assistant (RA) and instead appointed a Graduate Teaching Assistant to the project. A replacement RA was then appointed in February 2021. During 2021, as Dunnhumby had significantly increased the cost of data to UEA, UEA was able to source the additional funding required through collaboration with Ulster University. Ulster University became a sub-contract partner on the programme and provided RA support.

The key objectives for this project were to:

- Provide access to key performance measures for specific Stock Keeping Units (SKUs) supplied to Tesco by small food and drink producers in NI and the relevant sub-categories in which they are listed.
- Support the use of this market intelligence in business planning and market decision-making through a series of webinars, in which best practice is presented, and participants have the opportunity to ask questions and explore different ways in which market intelligence can be used within their organisation.
- Extend the reach beyond the Tesco supply chain through a series of sector specific workshops in which food and drink producers would be exposed to market intelligence from a range of sources and allowed

to explore how this could be used to support business planning and marketing decision-making for different markets (local, domestic and export) and marketing decision-making (pricing, promotion, packaging and distribution).

- Create a series of best-practice case studies that would provide invaluable reference material for new entrants and producers with limited understanding or experience of the critical role that market intelligence plays in supporting sales growth and business development.

The following activity was delivered:

- **Shopper Insight Delivery to all identified NI Tesco suppliers with Tesco COGS <£1m (changed from T/o <£6.5M):** The Web Portal was released on 27/09/2019 to all identified eligible NI Tesco suppliers with T/o <£6.5m and Tesco COGS <£1m.

By Q3 of Year 1, access to the web portal had been provided to 27 NI Tesco suppliers. At the project review meeting on 21/05/2020, UEA indicated that the turnover threshold of £6.5M was no longer a requirement but that the eligibility changed to Tesco cost of goods sold (COGS) <£1M. This increased access to 43 NI Tesco suppliers by the end of Year 1. 40/43 suppliers had permitted Invest NI's FDCI Team to access their reports on the portal, and the FDCI Team followed up with these companies to provide support in relation to analysis and interpretation of the data.

Access increased to 45 NI Tesco suppliers in Q1 of Year 2; however, this reduced to 44 by Q2 of Year 2.

Invest NI outlined that in Year 1, the main usage of the data was for buyer review meetings. The FDCI Team was encouraging more proactive usage in terms of NPD and marketing tactics.

Invest NI considered that some of the very small companies required significant handholding in relation to using the data. As a trial intervention, the FDCI Team created a peer mentoring relationship between a WBMF super user, TS Foods, and a micro business, Big Pot Co. This was agreed by both parties, and it was to be monitored to see the impact. However, due to time constraints at each company, they only had one initial meeting. Anecdotal feedback suggests that Big Pot improved its usage of Dunnhumby data, but this was not measured.

- **Delivery of 4 Webinars per annum** – The content was to be agreed with Invest NI, organised by the post-doc research assistant(s) and marketed by Invest NI to the Food and Drink sector in NI.

Per the PPE completed by Invest NI (dated April 2023), 9 webinars were delivered over the 3-year project, as follows:

Year 1	3 webinars were delivered in Year 1: 1. UEA released the first Webinar to all WBMF participants on 03/10/2019. The topic was: Introduction to the Web Portal. 2. UEA released the 2nd webinar to all WBMF participants on 21/02/2020. The topic was top tips on sustainable business growth for food and drink SMEs. 3. UEA delivered the third Webinar to all WBMF participants on 05/05/2020. This was a COVID-19 Impact on Tesco webinar. 30 delegates attended the webinar / 6 NI suppliers. There was a delay getting the last webinar organised due to limiting Client interaction during the immediate impact of COVID-19. The fourth webinar was to be delivered in August/September. This was to be a presentation of 4 potential Case Studies: • Cloughbane Farm Foods • Provenance Salads • TS Foods • Cavanagh Eggs
Year 2	1 webinar was delivered in Year 2, The Breakfast Shopper Mission, delivered digitally on 20/10/2020
Year 3	4 webinars were delivered in Year 3: 1. Using VR in Shopper Marketing

	2. What are your sustainable credentials 3. Negotiation skills 4. Extending your shelf space.
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- **Delivery of 4 Sector Workshops per annum** - Per the PPE completed by Invest NI (dated April 2023), 9 workshops were delivered over the 3-year project, as follows:

Year 1	3 workshops were delivered in Year 1: 1. The first Sector Workshop was held on 24/10/2019 for the Drinks and Beverages Sector. This was jointly organised by Invest NI and UEA. Invest NI took the opportunity to enhance the workshop with the addition of speakers from MCA and CAO Consulting to broaden the appeal to participants. 2. The 2nd Sector workshop was held on 19/02/2020 for the Fresh Produce Sector. This was jointly organised by UEA and Invest NI with additional speakers from The Food Foundation and AHDB. 3. The third Sector Workshop was held on 28/07/2020 for the Convenience Sector. The workshop was digitally delivered due to COVID-19. There was a delay getting the last workshops organised due to limiting Client interaction during the immediate impact of COVID-19. The Meat Fish Poultry Workshop was planned by Digital Delivery, for delivery in Aug/Sept.
Year 2	2 workshops were delivered in Year 2: 1. Tesco Connect workshop 2. Building a marketing plan for the Tesco Five Families
Year 3	4 workshops were delivered in Year 3: 1. In-store Promotions/Packaging/SRP 2. Tesco NI/Dunhumby UK 3. Emerging trends and their role in NPD. 4. Presentation of the University research that was part of the programme.

- **6 Case Studies published on “Who Buys My Food” website** – 9 case studies were published over the 3 years. Whilst the quarterly reports suggested that 7 case studies had been published as outlined below, the PPE completed in April 2023 stated that two further case studies had been completed – Doherty Meats and Just Live a Little.

Year 1	No case studies were published in Year 1. However, in November 2019, the RA spent 1 week in NI interviewing 7 case study Clients, with the following 6 case studies being further developed, albeit there was a delay in publishing due to the COVID-19 pandemic: 1. TS Foods. 2. Cloughbane Farm Foods. 3. Provenance Salads. 4. Cavanagh Eggs. 5. Morellis; and 6. Hillstown Brewery.
Year 2	4 case studies were published on the WBMF Website in January 2021 - TS Foods, Cloughbane Farm Foods, Provenance Salads and Cavanagh Eggs. The final 2 case studies were not completed in Year 2. Invest NI noted that, given Covid and Brexit pressures, it was not deemed appropriate to complete these with Clients when they had many other issues to deal with during 2020-21.
Year 3	3 Case studies were published in year 3: 1. Only Plant-Based. 2. MacNeice Fruit; and 3. Avondale Foods. Despite best efforts, the RA was unable to secure the commitment from a 4th Client to develop a case study.

In summary, key activities included:

- Shopper Insight Delivery provided to 44 NI Tesco Suppliers.
- 9 webinars delivered over the 3 years (against a target of 12).
- 9 sector workshops delivered over the 3 years (against a target of 12).
- 7 case studies published over the 3 years (target of 14 - 6 in year 1, 4 in year 2 and 4 in year 3).

The FDCI Team's completed PPE Report outlined the following:

- The contract commenced in September 2019, and then the Covid pandemic began in March 2020, so the delivery of the programme was significantly impacted by the lockdown. Only two workshops were able to be delivered in person in NI: Drinks and Fresh Produce. However, the contractor adapted to digital delivery and was mostly able to deliver the outputs of the programme. It was, however, difficult to secure permission to publish case studies as the projects contained sensitive commercial information, which the food and drink companies were nervous to share. To make up for the shortfall in events, the Research Assistants increased their one-to-one engagement with companies to support them through a challenging market environment.
- Whilst there were 44 participating companies on the programme, only 12 were actively engaged.
- Six months after programme completion, Invest NI completed a survey of participating companies and received 12 responses. Key findings included:
 - Survey Response Rate: 30% (12 of 40).
 - 92% of respondents were satisfied with the accessibility to the platform and support provided by UEA and Invest NI.
 - 10 respondents (83%) stated that they had improved their relationship with the Tesco buyer.
 - The project helped to safeguard 8 respondents' listings in Tesco, which safeguarded 44 product listings with an annual sales value of £4.9m.
 - The project helped to launch 24 new product listings for 8 respondents in Tesco, with an annual sales value of £1,116,000.
 - 10 respondents (83%) stated that they had considered accessing other sources of data.
 - 2 respondents indicated that they had recruited new people to access and utilise data/market intelligence. 2 jobs were recruited with salaries of £28k and £48k.
- Invest NI considered the programme to be very demanding of Invest NI time in terms of management of the delivery agent and providing additional support to the clients who required significant handholding. It was recommended after the 3-year WBMF project that a different programme design could be equally effective. The PhD research associated with the programme indicated that, alongside data provision, there is a need for a dedicated resource to analyse and interpret and capability development within the SMEs. Hence, the FDCI Team were proposing the design and development of an Insights Academy, which was anticipated to include:
 - Data provision to suit the specific needs of individual companies
 - Support for a dedicated Graduate resource
 - Accredited Capability Development Training in Category Management, Innovation and New Product Development
 - A suite of on-demand digital tutorials
 - Mentoring – Peer to Peer and/or Non-Executive Director.

It is understood that following the end of the three-year contract, Invest NI was not continuing to fund the programme after August 2022, and UEA and UU had secured funding from other sources to continue with the WBMF programme and were to keep in contact with the NI companies with updates on that.

Lumina Corp Membership (rebranded from MCA)

The main objective for Invest Northern Ireland and client companies availing of the service was to gain access to an up-to-date source of high-quality foodservice information which could be used to support business development activity in GB and further afield. Lumina (formerly MCA) is the only provider of such a fully comprehensive intelligence database for foodservice, and this was anticipated to be supported by bespoke support services for the duration of the subscription.

The subscription included access to the Food Strategy Forum alongside receipt of specific reports and guest speakers, as follows:

Table 4: Lumina Corp Membership Activity					
	2019/20	2020/21	2021/22	2022/23	2023/24
Reports accessed	- Restaurant Market Report - Pub Market Report - Healthier Eating Report - Food to Go Report - Foodservice Delivery Report.	- Restaurant Market Report - Pub Market Report - Food to Go Report - Wholesale Market Report.		- Concepts to Watch Report - Top of Mind Market Report - Food to Go Report - Eating Out Market Report - Food Strategy Forum Quarterly Debriefs - Quarterly Food Study Tours - Monthly Eating and Drinking Out Snapshots	
Guest speakers provided	- FDCI Drinks Workshop in October 2019 - Two MCA Account Managers came to Invest NI HQ in December 2019 for a contract review meeting and delivered a presentation to the Food and Drink Division.	FDCI Health & Wellness Seminar in November 2020	FDCI Sustainability Seminar in October 2021	Cost of Living Seminar in November 2022	What Consumers Want Seminar in October 2023.
Invest NI attendance at Lumina events	4 members of the Food Business Development Team attended the Consumer Insights Conference in London in February 2020 1 Food Business Development Manager went on a Food Study tour in London in March 2020. Attendance at these events was considered to have been useful for upskilling in the Foodservice sector in GB and for networking opportunities.	The FDCI Team attended regular Food Strategy Forum briefings and received the monthly Top of Mind reports, which were considered to be very useful in Client engagement.		- The FDCI Team attended regular Food Strategy Forum briefings and the food study tours, which highlight innovation in restaurant menus and delivery. - Lumina also provided a Foodservice analyst to present at Invest NI's divisional meeting on an annual basis in order to keep divisional staff informed of foodservice trends.	

The following usage information was provided from Lumina (and presented in the FDCI Team’s annual evaluations):

Table 5: Lumina Report Usage Information			
Reports consulted:	2021/22	2022/23	2023/24
Menu & Food Trends	25	32	37
Top of Mind	4	12	17
Concepts to Watch	-	15	20
Eating out Market	26	26	31
Food to Go Market	22	28	34
Pub & Bar Market	6		
Restaurant Market	6		
Wholesale Market	7		
Channel Pulse	2		
Foodservice Delivery	2		
Total	100	113	139

The annual evaluations noted the following:

- Lumina were quick to respond to Covid-19 and released daily updates at the outset of the pandemic, with intelligence on the key impact on operators and consumer eating out of home (OOH) behaviour. These reports continued on a twice-weekly basis throughout the pandemic and were considered to be extremely valuable to the FDCI Team in terms of sharing this with Clients on SharePoint and writing weekly summaries. The quality of the reports was considered to be excellent, if somewhat operator-focused.
- The quality of the platform, the market reports and the briefings were considered to be excellent.
- Lumina continued to deliver the full range of services digitally throughout the pandemic. During the review period, Lumina was the FDCI Team’s go-to platform for foodservice-related RDS, and it also provided context for the retail sector. Lumina was also used by the FDCI Team in at least 75% of 1:1 engagements.
- From 2022/23 onwards, there was a reduced level of subscription compared to previous years. The FDCI Team tested the usage of the reports and found that some were only consulted minimally. The subscription from 2022/23 onwards covered the Food Strategy Forum basic subscription, with the Food to Go report being included as it was most widely used.
- In each annual evaluation, the FDCI Team noted that if the reports utilised had been purchased individually from Lumina, the cost would have been c.£20,000. That is for reports only and does not include access to the ongoing Food Strategy forum dashboard, quarterly briefings, conferences, guest speakers at workshops, or the Covid-19 reports.

The annual evaluations undertaken by the FDCI Team considered the objective to be achieved through the online access to the Food Strategy Forum database, receipt of reports, Lumina Guest Speaker attendance at FDCI events and Invest NI’s attendance at Lumina events.

AHDB Corporate Membership (Active from 2019/20)

Invest NI’s Food and Drink Division have a corporate membership subscription with AHDB to support Clients in the Meat, Dairy, Produce and Potato Sectors with Consumer Insights and Export Marketing opportunities.

The key objectives for this corporate membership project were:

- Gaining a thorough knowledge of AHDB capabilities and activities for Invest NI and the NI Food sector.
- Understanding of the mechanisms of AHDB and how to engage and utilise AHDB resources at appropriate times.
- A clear matrix of data sources, information and reporting to assist with the ‘consumer-focused’ development of strategies and activities for Invest NI and NI food companies.
- A clear road map showing the market research, market information and relevant activities in key targeted markets to allow NI companies to focus their export activities effectively.
- Opportunities in external markets for NI food companies to grow profitably and contribute to the Invest NI business strategy target.

Within the Corporate Membership, Invest NI needed support services aligned with the AHDB remit to cover the following:

- Market intelligence data and information in appropriate formats, including reports, presentations and discussions, over a total of 6 days (3 events at 2 days each).
- 2 formal meetings with relevant AHDB representatives to discuss the wider landscape and identify areas of shared interest (10 staff days to prepare and deliver). This was anticipated to be in the form of round tables with key AHDB staff to explore/report on issues/areas identified as important to the NI food sector, and could be in the form of a conference call, in-person workshop or other- in essence, two meaningful sessions to exchange detailed information with an agenda to be set as agreed.
- Monthly director-level meetings to cover emerging items and wider subject matter, and oversee the project (3 days).
- Access to AHDB market insight reports, including the Horizon and International Consumer series.
- Attendance for 4 at the AHDB Export Conference and Grain Outlook event for INI representatives.
- Meat Dinner at Anuga/Sial – 2 places.
- AHDB International receptions, i.e. Japan/US – 2 places – dependent on which markets were anticipated to be of interest with Invest NI in-market presence.
- Option for presence at Anuga/Sial – with Invest NI staff and non-levy paying Companies using the AHDB stand as a base. Exhibition space was anticipated to be sold at commercial rates to non-levy paying Companies if available.

As outlined in detail overleaf, the FDCI Team used the following consultancy days:

- The FDCI Team were allocated 20 days of AHDB consultancy over 2 years (commencing 01 April 2019), and used 12.5 days.
- The FDCI Team utilised 10 days of AHDB consultancy in 2022/23; and
- The FDCI Team utilised 6 days of AHDB consultancy in 2023/24.

The FDCI Team required a reduced rate of support from AHDB in 2023/24, as there was no requirement for advisory and ad hoc enquiries from AHDB when accessing Kantar My World Panel.

Invest NI considered that the AHDB's Consumer Insights (CI) Team was a very valuable asset to the FDCI Team, as the AHDB CI Team were open and willing to share their knowledge and advice in relation to the establishment of the FDCI Team and particularly in relation to working with data providers and consultant partners. As the FDCI Team has developed, the main use of the consultancy days has been the delivery of webinars and guest speaker appearances at workshops and seminars. The FDCI Team consider that the AHDB CI Team undertake detailed research and delivers excellent presentations, which have received high scores in formal feedback surveys.

The FDCI Team utilised the following consultancy days from AHDB:

Table 6: FDCI Team AHDB Consultancy Day Usage			
Activity	Attendance	Consultancy Days	Comments per INI Evaluation
2019-21			
Advisory Support to FDCI team	FDCI Team and the AHDB Team Review Meeting FDCI / AHDB Advisory/Activity Planning Meeting	1 0.5 1.5	At AHDB in Stoneleigh At AHDB, before the AHDB Conference Kim Malley's visit to Invest NI Belfast
Ad Hoc Enquiries for Client Support	N/A	2	Enquiries on behalf of Foyle Meats, Finnebrogue, Linden, Dale Farm
Health Webinar for Invest NI	109	1.5	Excellent Feedback received from delegates
Invest NI Produce Sector Workshop	27	3	Grace Randall delivered a presentation at the WBMF Produce Workshop. Excellent Feedback received from delegates
Invest NI Health & Wellness Seminar – AHDB Guest Speaker	77	3	Susie Stannard delivered a presentation at the H&W seminar. Excellent Feedback
Total 2019-2021		12.5	
2022/23			
Invest NI Cost of Living Seminar – AHDB Guest Speaker	103	3	Rachel Gladmann and Grace Randall delivered a presentation at the FDCI Seminar.
Dairy webinar	14	3	Susie Stannard delivered a Dairy webinar on the cost-of-living cost update

Table 6: FDCI Team AHDB Consultancy Day Usage			
Activity	Attendance	Consultancy Days	Comments per INI Evaluation
Meat webinar	9	3	Steve Evans delivered a Meat webinar on the cost-of-living cost update
Ad Hoc Enquiries for Client Support		1	Client enquiries to support RDS for Finnebrogue and Foyle Foods were addressed by AHDB, and advisory support was provided in relation to Kantar engagement.
Total 2022/23		10	
2023/24			
Demand & Opportunities for Red Meat	16	3	Whilst the webinar did not attract good attendee numbers live, it was posted on the Insights Hub and has been accessed 27 times since delivery.
Consumer Reputation Landscape Meat and Dairy	11	3	Whilst the webinar did not attract good attendee numbers live, it was posted on the Insights Hub and has been accessed 12 times since delivery.
Total 2023/24		6	

Vypr (active since 2020)

During 2020/21, it was considered that whilst the FDCI Team was working across a broad range of sectors and categories and supporting companies with high level consumer and retail data through platforms such as IGD, MCA, AHDB, Mintel, Mintel GNPD, Euromonitor and subscriptions to journals, and that the information was comprehensive and supported the decision making of clients, it lacked in the ability to ensure companies made informed decisions at a granular level. For example, whilst syndicated information may give the client confidence that there is potential for certain product development ideas, it does not and cannot answer questions on the specifics of individual product concepts (e.g. flavour, packaging and branding choices) that the client will have to undertake as part of this process. Access to a bespoke survey app was therefore considered to be a cost-effective means of overcoming this problem, with the added benefit of the speed at which this information could be turned around.

The projected benefits of this type of procurement were as follows:

- The FDCI Team could provide an enhanced service to the NI Food and Drink Industry in terms of the provision of bespoke primary insight via a primary research survey app to support strategic decision-making.
- The FDCI Team could utilise the service in the development of original content for thought leadership, to stimulate the use of data to drive their NPD, sales and marketing strategies.
- FBBDT could provide an enhanced service to the NI Food and Drink Industry in terms of developing winning sales propositions with bespoke, substantiated insight to support listings for new product development.
- It was considered that the benefits would be immediate on the provision of access to the database.

The main objective of the proposed activity was to provide access to a primary research survey app that was robust, cost-effective and usable across different levels of data competency for the UK and Ireland for food and drink grocery categories, including pet food.

The projected outputs from the assignment were:

- A multi-user licence to an online primary research survey app that can target robust and validated panels within the UK, NI & ROI markets.
- Permission to share data with Invest NI Clients on a one-to-one basis and to use the data for content development for workshops, seminars, conferences, e-zines and blogs.
- Access to ongoing analyst support for the interpretation of data.
- Account Management and Customer Service Support.

A pilot was undertaken in 2020. The FDCI Team considered that the use of a quick survey app like Vypr was instrumental in demonstrating to clients that there are less onerous and more cost-effective options for smaller companies to complete primary research (albeit not suitable for larger, more complex projects). The bespoke analysis provided to clients through Vypr was considered to have provided a level of confidence and assurance to companies planning to launch new flavours of products, new designs of packaging and branding, as well as providing indicative guidance on levels of pricing compared to the competitive set.

Activity across the period has been as follows:

- The initial pilot in 2020 supported 8 client companies and was utilised for internal projects in relation to Covid, breakfast mission attitudes and health & wellness to facilitate internal content generation. The access was used on several different styles of projects with clients, including launching new brands into the retail market, concept funnelling for NPD and category knowledge fill, which demonstrated the versatility of use the platform has.
- During 2021, 12 projects were supported from a wide cross-section of clients representing multiple sectors and business life stages.
- During 2022, 17 clients were supported across 25 projects. This represented a strong cross-section of businesses, both in terms of geographic location, stage of business and category of operation. Returning clients were often seeking to refine their propositions after an initial survey, which was considered to positively demonstrate behavioural change in their approach to product development.
- During Jan-Oct 2023, 93 Steers were used, with the remaining steers to be targeted at monthly market intelligence clinics (Oct, Nov, Dec – Target 15 appointments x 3-5 questions) & Gifted (Target 5 companies x 5 questions) with the remaining steers held for client one-to-one projects. The FDCI Team advised that all steers were used.
- During 2024, the service was used with 44 different clients.

The projects varied, including brand testing, NPD concept testing and general category information fill. The service was also utilised internally as a resource, for example, in preparation for the Health and Wellness seminar held by the team in November 2020, the team posed relevant questions to the panel, which provided real-time insight into how consumer attitudes towards health and wellness had been impacted by the pandemic.

In addition, across each year, the service facilitated engagements with third-party industry partners to support industry-wide events. For example:

- The FDCI Team supported the Food Standards Agency with an event focused on re-formulation and the need for businesses, particularly within the bakery & dessert sector, to understand not just the potential legislative requirements around sugar, fat & salt reduction but equally the consumer desire for products that help support this objective. Vypr was used to demonstrate consumer acceptability for re-formulated products, supporting the event objectives.
- Similarly, at an industry held by CAFRE on the plant-based category, Vypr was utilised to bring a consumer angle to what was largely a technical event and ensured that the consumer was not lost in the science.

The monitoring reports outlined that the feedback from clients had been very positive, and that the ability to test concepts and ideas with a live panel had given them more confidence and assurance around decision-making and, in some instances, where results were perhaps not as expected, had allowed them to revise and amend propositions ahead of launch to market. The monitoring reports outlined that, as a direct result, clients used the insight gained from Vypr to translate into retail listings. For example:

- Forest Feast utilised the service to test flavour profiles for the granola market, which can now be purchased in-store.
- Rich Sauces acquired a listing of 4 of their range of Alfee's branded sauces with various retailers and have indicated that the survey insight was invaluable.

“Being able to very quickly explore consumer preferences on such areas as branding, design, product names, call outs, pack formats, flavours, pricing, etc. has been invaluable. Indeed, it allows you to confirm your own thinking, but more importantly, to influence & shape your future product/brand strategy.

I have found the FDCI Team at Invest NI extremely effective, knowledgeable, insightful & supportive. The team took the time to fully understand our aims & indeed her input has often given us a slightly different slant to our thinking. She ensures that the areas explored and the questions in the questionnaire are fit for purpose to achieve our desired goals.” Consultant working on behalf of Rich Sauces

In terms of the product itself, the FDCI Team found the platform to be easy to use and navigate. The speed at which the team was able to achieve answers was viewed as a particular benefit. Whilst the service itself is

targeted specifically at facilitating decision making around the product development process, the FDCI Team found they were also able to address category knowledge fill and test attitudes to specific trends in addition to more traditional product development style projects, indicating a level of versatility.

thefoodpeople (tfp) trendhub (Active from 2020/21)

The main objectives of the proposed activity were to access a comprehensive source of food and drink inspiration and innovation ideas and address an identified need for trends information across both retail and foodservice.

The usage figures for the TFP Trendhub were as follows:

Table 7: TFP Trendhub usage figures				
Usage figures	2020/21	2021/22	2022/23	2023/24
Invest NI users	15	15	15	14
No. of reports/articles accessed	1,594	10,914	12,499	17,477
RDS completed	92	84	72	>100
Most consulted reports related to searches for	- Plant based - Health & wellness - Convenience - Trend predictions - Food to go	- Breakfast - Keto - Celebration - Artisan - Plant Based - Condiments - Charcuterie - Oats - Alternative Milk		- Personalised Nutrition - Tepache - Oat Milk - HFSS - Ultra Processed Foods (UPF) - Micro Greens - Leaf Salads - Pizza - Meal Kits - Ancient Grains - Frozen - Snacking.

The annual evaluations completed by the FDCI Team noted the following:

- TFP Trendhub is considered to be an essential platform within the Consumer Insights Toolkit for horizon scanning of macro trends and global food trends, and has been used for most RDS.
- TFP granted enhanced sharing permissions during 2020 for the vast number of COVID-19-related reports which were published during the year. The Invest NI FDCI Team created a SharePoint site for sharing market intelligence from all FDCI data providers relating to the impact of the pandemic on consumer behaviour. TFP were an important part of this initiative. Invest NI noted that there was excellent feedback on this service and the quality of TFP reports, and it enabled the FDCI Team to introduce Trendhub to a much wider range of companies.
- TFP delivered many webinars and podcasts during the subscription period. These were well attended by the FDCI Team for upskilling and remaining up to date with trends.
- In addition, the FDCI team utilised the Membership to avail of a guest speaker appearance by Charles Banks, Founder of The Food People, at multiple seminars, including the Health & Wellness Seminar in November 2020, the Sustainability Seminar in October 2021 and the What Consumers Want Seminar in October 2023.

Whilst the objective to gain access to a comprehensive source of food and drink inspiration and innovation ideas with trends information across both retail and foodservice was achieved, the Evaluation Team notes that there were no targets established associated with the level of usage (e.g., the number of reports accessed, RDS utilising information, etc.).

IWSR (Active since 2019/20)

Invest NI's Food and Drink Division has taken a 3-year corporate membership subscription with IWSR (since 2019/20) to support Clients in the Drinks Sector (Spirits) with Consumer Insight and Specialist Data for Export

Marketing opportunities. This was a joint FDCI and Drinks Sector Client Team Initiative. The data is uploaded to the IWSR platform in May each year, whilst further insight is provided on an ongoing basis via regular newsletters.

IWSR was identified as the key database for the spirits sector targeting global markets. The Clients access the database either through the FDCI team undertaking the data mining and research on their behalf or by visiting the Market Intelligence centre to undertake the research themselves, guided by an FDCI officer.

Access to IWSR was anticipated to allow Invest NI to help clients with research concerning:

- Markets and competitors, both in the UK and overseas.
- Research historical and rolling 5-year forecast data.
- Research volume and value data of competitors at the brand and sku level.
- Research sales forecast by price band in individual markets.
- Research consumer trends, preferences and behaviours in individual markets.
- Research innovations in packaging, product formulation and other product development.
- Research travel retail, duty-free and e-commerce opportunities by market.

The anticipated benefits of access to the above were that it would enable the companies to:

- Conduct in-depth reviews of specific markets —saving time and resources on speculative activity.
- Identify the fastest-growing brand lines and brands over the past 5 years.
- Give insights into the reasons underpinning growth trends and success.
- Understand which markets to avoid.
- Understand the price segments trends in all key markets.
- Support better, more efficient and more effective decision making.

The key objectives of the Project were:

- To provide open and ongoing access to brand sku level performance data of Irish whiskey, Scotch whisky, Vodka and Gin across all key export markets
- Support the use of this data in business planning and market decision making through a series of workshops and one-to-one clinics, in which learnings were presented, and participants had the opportunity to ask questions and explore different ways in which the data could be used within their organisation.
- Develop several Market Entry Analysis reports on key markets to provide comprehensive and accurate key metrics that support and aid decision-making by all Invest NI Sector Spirits Clients.
- Through this process, create a series of best-practice case studies that were anticipated to provide invaluable reference material for new-entrants and producers with limited understanding or experience of the critical role that market intelligence plays in supporting sales growth and business development.

The Project SMART targets were to (by 2022/2025⁵⁷):

- Support at least 5/7 client companies to use the data to develop at least 6/5 new market entry strategies each (30/35 in total) by 2022/2025.
- Support at least 5/7 client companies to enter 6 new markets each (30/35 in total) by 2022/2025.
- Support 10 Client companies to use the database at least 2 times per annum (60 times in total) to update their strategic and/or export plans by 2022 and 2025.
- Allow the Invest NI Sector Team to develop at least 10 market entry analysis reports for Sector Clients for the priority markets by 2020 and 2025.
- Allow Invest NI Sector Team to develop at least 3 case studies to promote the benefits of using data to make more efficient and effective decisions by 2022; and
- Support Invest NI Sector Drinks Clients to grow KPI sales by £63m (2019) to £129m per annum by 2025 and increase employment in the sub-category to 522 by 2025.

⁵⁷ By the end of each 3-year contract period.

It was anticipated that the above would lead to the database being used at least 50 times per year (150 times in a 3-year contract period), by Invest NI Sector Team to educate and inform themselves and their clients, and directly by Clients once proficient.

The annual monitoring completed by Invest NI suggested that the IWSR database filled the gap in the FDCI toolkit that was previously identified. The initial 3-year pilot project (2019-2022) was considered to have enabled the FDCI Team to assess the quality of the provider and the usage of the database.

The database was used extensively by the FDCI Team and BIC Team in the fulfilment of RDS with drinks sector clients, enabled the delivery of a Drinks workshop which was considered to have been well attended by the sector, provided background data and research for input into casework appraisals by the Client team and was used directly by a small number of clients for strategic planning.

Invest NI outlined that it was unfortunate that the pilot coincided with the 2-year pandemic when the Business Information Centre was necessarily closed; however, the Invest NI team pivoted to providing a digital FDCI and BIC service for the completion of RDS. The FDCI and Drinks Client Team analysed the database and prepared an export strategy, which was shared with the key spirits clients.

During 2019/20, the database and the insights from the regular newsletters were used in RDS fulfilment by IRTD, BIC and FDCI Teams. Some Client projects during this period were:

- Chapman – Apple Brandy Project
- Armagh Cider – Hard Seltzers
- Whitewater
- Belfast Distillery
- Otzibrew
- McIvors
- TBD Brew

The Client Team used the database in their regular engagement with the following Growth Account Clients:

- Niche
- Echlinville
- Boatyard
- Hinch
- Rademon
- Belfast Distillery
- Hughes
- Other Drinks Clients in the FD Division and the Regional Business Group on a more ad hoc basis.

The monitoring outlined that the IWSR was a very valuable asset to the FDCI and the Drinks team. Whilst it is only relevant to a small number of Clients, it was considered to be exactly what they need, and it would be cost-prohibitive for them to purchase it themselves. There were also added benefits of subscription by way of access to webinars, blogs, articles and insights on the drinks sector, which were used widely by the BIC and FDCI Team.

Invest NI's annual monitoring noted that whilst the average annual subscription of £32k was relatively expensive for one sector, it was a specialist data source and was widely recognised as a credible source of market data for this sector. There are 44 alcoholic drinks companies in the Client Portfolio. The sector has global market potential and provides a good international profile for NI Food and Drink; it was therefore considered to be important to support them as fully as possible in line with the global ambition driver of Invest NI's Business strategy.

The monitoring outlined that the data supported the growth of several high-potential start-ups, including Belfast Distillery and Hinch Distillery. As an example, these 2 firms alone have used the data to successfully enter 32 new export markets since 2019, selling over c£3.5m of spirits and have ambitions to scale to over £20m over the next 4 years.

A Distillers network was also established, and there was considered to be good momentum in the sector for further engagement with IWSR and other relevant data providers.

A survey was completed in March 2022, which received 8 responses (issued to 44, 18% response rate). Key findings were as follows:

- The respondents indicated that they primarily used the data for identifying target export markets (88%, N=8), developing business plans (63%), competitor analysis (63%) and/or developing market entry plans (50%).
- All respondents had used the Country Reports, whilst 6 respondents used the Excel files and 4 used the Invest NI Spirits Export Strategy.
- 1 respondent considered the data to be essential, whilst 6 (75%) considered the data to be useful. One respondent did suggest that the data was not useful for them at the stage they were at.
- Respondents indicated the following usage of the IWSR database:

How often do you use the IWSR database?	No of respondents	%
Never	1	13%
Once per year	2	25%
2-4 times per year	3	38%
Monthly	2	25%

- The most useful features of the database/reports were the Country Reports (88%, N=8), Category forecasts (50%), Price level information (38%) and Brand level data (25%).
- Respondents were asked if the IWSR contract was extended, and how often they would expect to use it over the next three years. Half of the respondents indicated that they would use it at the same level, whilst the other half suggested that they would use it more over the next three years.
- None of the respondents could link the data to ‘export wins’.
- Respondents indicated that they have distribution contracts in the following markets:

What markets do you have distribution contracts in?	No of respondents	%
NI	7	88%
GB	6	75%
USA	6	75%
Canada	6	75%
Ireland	5	63%
Germany	5	63%
France	4	50%
Australia	3	38%
Russia	2	25%
Ukraine	2	25%
South Africa	2	25%
Poland	2	25%
Denmark	2	25%
Czech Republic	1	13%
Sweden	1	13%
Italy	1	13%
Norway	1	13%
Holland	1	13%
Belgium	1	13%
South Korea	1	13%
Greece	1	13%
Malta	1	13%
Switzerland	1	13%
China	1	13%
Taiwan	1	13%
Japan	1	13%
Hong Kong	1	13%

- The survey also asked respondents to state the value of their sales outside NI in 2021 and the projected levels in 2022, as a turnover range was captured; only 3 of the 8 respondents projected growth (into a new range).

Business Respondent	2021	2022
1	£10m+	£10m+
2	£5m - £10m	£5m - £10m
3	£0 - £250k	£1m - £2m
4	£500k - £1m	£1m - £2m
5	£0 - £250k	£0 - £250k
6	£1m - £2m	£2m - £5m
7	£2m - £5m	£2m - £5m
8	£500k - £1m	£500k - £1m

- Only one of the respondents suggested that they would pay for IWSR data themselves.
- The respondents indicated that they have used the following other sources of market data.

What other sources of market data have you used?	No of respondents	%
Mintel	3	38%
Euromonitor	1	13%
Globaldata	1	13%
CGA	1	13%
Drinks Ireland – Whiskey	1	13%
IGD	0	-
Lumina	0	-
Trendhub	0	-

It is understood that due to resource constraints, the case studies were not completed. In addition, **the annual monitoring reports did not set out progress against the SMART targets.**

Globaldata (Active since 2021/22)

Invest NI's Food and Drink Division took an initial 3-year contract with Globaldata in October 2021 to support Clients in all Food and Drink Sectors with Consumer Data and Insights for global marketing opportunities. Globaldata had been identified as a key Food and Drink consumer data platform with good granularity that was anticipated to enhance the FDCI toolkit, but also add value to the BIC and Trade Teams for targeting export marketing opportunities.

The contract provided 5 user licences for Globaldata's data platform, which covered over 150 countries, and provided raw data analysers to sub-segment level, insight reports and could be searched by countries, sectors, segments and companies. There were 2 guest speaker appearances also built into the contract, split between the FDCI and Trade Teams.

The data was uploaded on an ongoing basis, and deep dive reports were published monthly. Further insight was provided via regular features, newsletters and webinars. The FDCI Team, Trade Team and BIC valued this global market intelligence database in their toolkit for Client Engagement 1:1, and it was considered to be useful in the development of one-to-many content.

The main objective of the proposed activity was to access an export market-focused market intelligence platform that had the granular level of detail required for Food and Drink companies, and product launch case studies and trend analysis to inform NPD.

The projected outputs were:

- Increased usage of consumer and trends data by the Invest NI FDCI Team for engagement with Clients on new product and new export market development, and for the development of initiatives to support Clients.
- Increased usage of consumer and trends data by the Invest NI BIC Team for engagement with Food and Drink Clients on new product and new export market development.

- Increased usage of consumer and trends data.

The monitoring reports indicated that the FDCI Team delivered over 60 and 70 RDS engagements (in 2021/22 and 2022/23) with Clients and 12 Market Intelligence Clinics per annum, with Globaldata used for these projects.

The usage statistics for Invest NI were as follows:

Table 8: Globaldata usage				
	2021/22		2022/23	
	No. of hits	Value	No. of hits	Value
Free Content hits	587	£0	164	£0
Value Content hits	1,090	£496,439	1,289	£952,250
Total	1,677	£496,439	1,453	£952,250

The value of content accessed was as follows:

Table 9: Globaldata Value of Content Accessed				
	2021/22		2022/23	
	No. of hits	Value	No. of hits	Value
Companies & Competitive Intelligence	5	£625	10	£10,000
Countries & Sectors	111	£288,547	570	£210,050
Deal Reports	1	£100		
Market Analysers & Market Data	21	£52,500	99	£21,700
News	3	£150	11	£1,100
Opinion	54	£13,500		
Price Intelligence	1	£2,500	2	£2,600
Market Overview			223	£22,300
Product Innovations & Launch Analytics			14	£8,450
Other			157	£19,950
<i>Reports:</i>				
Case Studies	7	£7,668	30	£59,200
Insights & Trends	27	£86,484	79	£404,050
Global Analysis	1	£3,500	24	£144,900
Thematic Analysis	19	£40,869	14	£47,950
Total		£496,439		£952,250

Syndicated Consumer Panel Data: Kantar UK & Ireland

Invest NI's Food and Drink Division took a 3-year contract (in 2022/23) with Kantar UK and Ireland on a 1+1+1 basis to support Clients in all Food and Drinks Sectors with Consumer Data and Insight for the UK and Ireland. The contract was to provide unlimited user licences for the Kantar MyWorldPanel data platform. The platform provided consumer data to sub-sector level and split by retailer. The contract also included 1 Analyst Guest Speaker & 2 Ad hoc Deep dives.

The main objective of the proposed activity was to provide access to syndicated consumer panel data for the UK and Ireland for food and drink grocery categories, including pet food.

The projected outputs from the assignment were:

- A multi-user licence to an online consumer panel database at the sub-category level for all food and drink categories, including pet food, across all retail channels, for the UK and Ireland.
- Permission to share data with Invest NI Clients on a one-to-one basis and to use the data for content development for workshops, seminars, conferences, e-zines and blogs.
- At least 2 service provider guest speaker appearances per annum at Invest NI-organised events.
- Access to ongoing analyst support for the interpretation of data.
- Account Management and Customer Service Support.

The projected benefits of the assignment were that:

- The FDCI team could provide an enhanced service to the NI Food and Drink Industry in terms of the provision of credible consumer panel data for Client engagement, delivery of events and development of original content for thought leadership, to stimulate the use of data to drive their NPD, sales and marketing strategies.
- FBBDT could provide an enhanced service to the NI Food and Drink Industry in terms of identification of sales trends, growth opportunities and market gaps across UK and Ireland retail channels and working with the companies, help them to address the challenges they face and exploit the opportunities.
- The benefits were anticipated to be immediate upon the provision of access to the database.

The data was uploaded on an ongoing basis, biannually for the UK and quarterly for Ireland. Further insight was provided via regular features, newsletters and webinars.

The FDCI Team considered that access to this resource had been a game-changer for the team. The FDCI Team were now able to produce their own reports for market sizing, growth rates, penetration, rate of sale, frequency of purchase, all broken down by retailer. This was considered to have provided a level of depth and granularity that the Team had not been able to do, and had been used in every retail channel-related RDS with clients (72 in 2022/23, over 100 in 2023/24 and 2024/25). The data was able to be exported to Excel and PowerPoint, and clients could use the reports directly in their retailer buyer meetings.

The analysis of the data was also used in the development of content for The Insights Hub and in the design of workshops and events.

From 2023/24, Kantar provided an enhanced level of service on their agreement by supplying regular Retailer Stories and category analysis, and a Christmas performance report for both the UK and Ireland markets, which was posted on the Invest NI Food & Drink Insights Hub as part of a Christmas Collection 2023.

Across the contract years, the FDCI Team negotiated changes with the Kantar Account Managers to remove categories of limited value and extend the depth of other categories that were considered to be of more value in relation to the Client portfolio.

The Invest NI monitoring noted that the FDCI Team delivered over 100 RDS engagements with Clients and c.12 Market Intelligence Clinics per annum, and Kantar was used for most of these projects.

The Guest Speakers and Deep Dives activity was as follows:

Table 10: Kantar Guest Speaker and Deep Dive Activity		
Contract Year	Guest Speaker and Deep Dives	
	UK	Ireland
2022/23	Analyst Guest Speaker – Cost of Living Seminar, Nov 2022 Deep Dive 1 - Dairy Sector, commissioned Feb 2023 Deep Dive 2 – Varied to Speaker for NIFDA conference, April 2023	Analyst Guest Speaker – CAFRE Alternative Foods Workshop, October 2022 Deep Dive 1 – Bakery Sector, commissioned Feb 2023 Deep Dive 2 – Convenience, commissioned March 2023
2023/24	Analyst Guest Speaker – What consumers want seminar, October 2023 Deep Dives 1 & 2 – The convenience category – as this is a very broad category and Invest NI has many clients within this portfolio, this was a very large piece of work, which absorbed the number of consultancy days for two deep dives and was delivered by report and by presentation.	Analyst Guest Speaker – Not delivered, despite regular follow-up by the FDCI Team. Deep Dives 1 & 2 – The convenience category – as this is a very broad category and Invest NI has many clients within this portfolio, this was a very large piece of work, which absorbed the number of consultancy days for two deep dives and was delivered by report and by presentation.
2024/25	Analyst Guest Speaker – What retailers want seminar, October 2024 Deep Dives 1: Kantar agreed to do two smaller deep dives to cover two projects as a combined deep dive: The Sausage Category – this was used for several clients in this category for RDS	Analyst Guest Speaker – NI Market Deep Dive Deep Dive 1: Bakery Category - this was used to support the clients participating in the Bakery Hub at the Invest NI Showcase. Deep Dive 2: Produce Category.

Table 10: Kantar Guest Speaker and Deep Dive Activity

Contract Year	Guest Speaker and Deep Dives	
	UK	Ireland
	projects. Snacking category – this was used for an internal appraisal for an AFII case. Deep Dive 2: Bakery Category - this was used to support the clients participating in the Bakery Hub at the Invest NI Showcase.	

Dunnhumby Ireland 2022

The Dunnhumby Ireland contract commenced in January 2022. The main objective of the proposed activity was:

- To access Tesco Ireland loyalty card data to support NI suppliers to Tesco Ireland and those who aspired to secure a Tesco Ireland listing. Also, for the FDCI Team to use the data for events and content development.
- Whilst the loyalty card data was specific to Tesco Ireland, given that Tesco Ireland represented 21.6% of the RoI retail sector, the data was also considered to be a good indicator of trends and patterns across the RoI retail sector in general.

The projected outputs from the assignment were:

- Improved KPIs for the Invest NI Food and Drink Clients that supply Tesco Ireland.
- Increased usage of consumer and trends data by the FDCI Team for engagement with Clients on new products and new export market development, and for the development of initiatives to support Clients, particularly those supplying Tesco Ireland or hoping to secure Tesco Ireland listings.
- Increased usage of consumer and trends data by the Invest NI Food Business Development Team for engagement with Food and Drink Clients on new product and new export market development.
- Increased usage of consumer and trends data by Invest NI Clients for planning of new products and new export market development.

Invest NI outlined that it took a few weeks to get the Clients on-boarded, trained, and all their tailored reports set up so that they were available for them regularly when new data was uploaded monthly. This required significant support from the FDCI Team. The Clients were then able to use the platform on a self-serve basis. All of the service level agreement was used in terms of consultancy days and credit allowances.

The incubator programme was delivered in three parts:

- **Part 1 - Shopper Insight Delivery to all identified NI Tesco suppliers to Tesco Ireland with COGS < €1.5M** - This provided access to the dunnhumby Ireland Shop Web portal and 2 defined Shop reports (1. Performance in detail and 2. Where are my brands and products sold?)

The shopper insight was supplied to the eligible NI Tesco Ireland suppliers via the dunnhumby Shop Web portal. There were 13 eligible companies. Three months after programme completion, Invest NI completed a survey of the participating companies (13) and received 6 responses. Key findings included:

- Survey Response Rate: 46% (6 of 13).
- All the respondents were satisfied with the accessibility of the platform, the training and support provided by dunnhumby Ireland and the support provided by Invest NI.
- 4 respondents (67%) stated that they had improved their relationship with the Tesco buyer.
- The project helped to safeguard 4 respondents' listings in Tesco, which safeguarded 30 product listings with an annual sales value of £2.52m.
- The project helped to launch 7 new product listings for 4 respondents in Tesco, with an annual sales value of £454,000.
- All respondents stated that they had considered accessing other sources of data, including Kantar (50%) and Nielsen (33%).

"Because of the accessibility of sales data, I was able to make factual based suggestions to the Buyer that increased sales for the category."

"The Dunnhumby trial enabled multiple projects to move forward with Tesco Ireland by allowing us to assess each product within our range and provide recommendations as to how particular products could be improved to increase their appeal with the Tesco families."

The Buyer and Product Development Manager at Tesco Ireland were really impressed with the dataset we presented from dh as it allowed them to see clearly where the opportunities were. It also positively portrayed our business as they could see that we had gone to a lot of effort to collate the data and pull out the insights."

"As a tertiary brand in ROI, it helped to gain further credibility and trust with Tesco Ireland. It embedded a deeper understanding of the category to enable us to advise Tesco and build our strategic proposal."

"We were able to demonstrate clear insight, performance vs targets, market gaps and opportunities in a credible way to the Buyer."

- **Part 2 -Credit allocation: request for additional Shop reports out of contract scope could be fulfilled through the utilisation of a credits system (30 credits per annum, each additional report costs 5 credits per use)** – The credit allocation was used in conjunction with two clients.

To complement the consultancy project with Finnebrogue, as detailed in part 3, 2 x switching reports were utilised to understand the interactions between brands within plant-based.

The remaining credits were allocated to a project with TS Foods (a late entrant to the programme) to support a site visit from Tesco Ireland post-Christmas to review seasonal stuffing performance and support the presentation of a range of recommendations for the next 12 months. Invest NI analysis support was provided as part of this.

- **Part 3 – Consultancy days (6 days)** - Consultancy time supported two client projects across the contract term for Whites Oats and Finnebrogue Artisan.

The Whites project (3 days) focused on the performance within granola & muesli to support product development plans within Tesco Ireland, as well as to inform wider plans across their customer portfolio.

The Finnebrogue project (3 days) facilitated wider strategic planning within the plant-based sector to safeguard their positioning within an increasingly fragmented and competitive category. The dh demographic profiling proved invaluable in setting out specific brand roles within the category and allowing Finnebrogue to carve out a solid position for the Naked brand in the face of expected category consolidation by Tesco and, indeed, other retailers.

Whilst there were 13 companies on the programme, only 6 were considered to be actively engaged. The monitoring report suggested that the 6 companies delivered *"very good outcomes, which indicates that if companies use data effectively it can reap the rewards"*. However, the programme was considered to be very demanding of Invest NI time in terms of setting up the reports on the Dunnhumby shop portal on behalf of the clients and providing additional support to the clients who required significant handholding and interpretation support.

CGA by Neilson

As a result of ongoing Client engagement in relation to data and insights, the FDCI team identified a gap in their toolkit for consumer insight in the foodservice channel. The FDCI Team purchased the CGA Food Insights Report in 2021 and 2022 and has found it invaluable in terms of consumer behaviour in the foodservice sector. The CGA Food Insights reports were widely used and were considered to be a great complementary report to the Lumina operator-led reports.

The objective was to gain access to an up-to-date source of high-quality foodservice consumer information, which could be used to support business development activity in GB and further afield. CGA was identified as a credible provider of consumer insight reports for the foodservice channel.

Appendix V – Insights Events Activity

Based on a review of the monitoring information provided, the following event-related activity has been collated:

Table 1: Overview of Workshops and Attendance			
Year	Workshop	Total attendance⁵⁸	No. of business attendees (where known)
2019/20	Fresh Product Workshop (WBMF)	29	12
	Drinks & Beverages Sector Workshop (WBMF)	45	31
	Introduction to the Web Portal (WBMF Webinar)	Evidence missing	-
	Sustainable Business Growth (WBMF Webinar)	Evidence missing	-
	COVID-19 Impact on Tesco (WBMF Webinar)	30	Not known
2019/20 Total	5 workshops	104	43
2020/21	Health & Wellness Seminar	140	74
	The Breakfast Shopper Mission (WBMF Webinar)	Evidence missing	-
	Convenience Sector (WBMF Workshop)	11	11
	Tesco Connect workshop (WBMF Workshop)	19	19
	Building a marketing plan for the Tesco Five Families (WBMF Workshop)	Evidence missing	-
2020/21 Total	5 - 4 workshops and 1 seminar/ conference	Workshop: 30 and Conference: 140	Workshop: 30 and Conference: 74
2021/22	Sustainability Seminar	169	104
	Using VR in Shopper Marketing (WBMF Webinar)	Evidence missing	-
	What are your sustainable credentials (WBMF Webinar)	Evidence missing	-
	Negotiation skills (WBMF Webinar)	Evidence missing	-
	Extending your shelf space (WBMF Webinar)	Evidence missing	-
	In-store Promotions/Packaging/SRP (WBMF Workshop)	Evidence missing	-
	Tesco NI/Dunhumby UK (WBMF Workshop)	Evidence missing	-
	Emerging trends and their role in NPD (WBMF Workshop)	12	12
	Presentation of the University research that was part of the programme (WBMF Workshop)	Evidence missing	-
	AHDB Retail and Foodservice Landscape	7	5
	AHDB Consumer Trust in Farming	28	13
2021/22 Total	11 - 10 workshops and 1 seminar/ conference	Workshop: 47 and Conference: 169	Workshop: 30 and Conference: 104
2022/23	Cost of Living Seminar	103	75
	Dairy webinar (AHDB)	14	Not known
	Meat webinar (AHDB)	9	Not known
	CAFRE Alternative Foods	30	30
	Drinks IWSR	23	14

⁵⁸ Live attendance (either online) or in person. The FDCI Team outlined that in a number of cases, they did not hold attendance details.

Table 1: Overview of Workshops and Attendance			
Year	Workshop	Total attendance ⁵⁸	No. of business attendees (where known)
	Kantar Christmas	Evidence missing	-
	Kantar Veganuary	Evidence missing	-
	WBMF Extending your Shelf space – Purple Basil	Evidence missing	-
	WBMF = Emerging Trends and their role in NPD	Evidence missing	-
2022/23 Total	9 - 8 workshops and 1 seminar/conference	Workshop: 76 and Conference: 103	Workshop: 44 and Conference: 75
2023/24	Plant-Based Webinar, Mintel	40	Not known
	Convenience Meal Solutions, Kantar Ireland & Kantar UK	22	Not known
	Foodservice Food Insights, CGA by Nielsen IQ	32	Not known
	Healthier & Sustainable Vending, IGD	112	Not known
	What consumers want, what they really, really want – annual seminar	111	88
2023/24 Total	5 - 4 workshops and 1 seminar/conference	Workshop: 206 and Conference: 111	Workshop: Not known and Conference: 88
2024/25	AHDB: Demand & Opportunities for Red Meat Webinar	5	0
	AHDB: Consumer Reputational Landscape Meat & Dairy Webinar	6	4
	Kantar Ireland and UK: Deep Dive into the Bakery Sector Webinar	31	26
	Kantar: NI Market Overview Webinar	62	41
	Kantar RoI: Produce Category Webinar	7	4
	Workshop - IWSR: Distillers Network/Conference Global Spirits Trends	48	34
	Conference – What retailers really, really want	126	79
2024/25 Total	7 - 6 workshops and 1 seminar/conference	Workshop: 159 and Conference: 126	Workshop: 109 and Conference: 79

An overview of the objectives contained in the event-related business cases provided, and the progress against the specific business case objectives are outlined below (where relevant and available).

Table 2: Achievement of Event Objectives														
Business Case Title	Objectives (per business cases provided)	Progress/Achievement against objectives (per monitoring provided)												
FYE March 2020														
Fresh Product Workshop	The objectives of the activity were to: - Engage with the Fresh Produce & Potato Sector in relation to data and insights - Increase knowledge and understanding of trends in the Fresh Produce and Potato Sector - Raise awareness of the market information platforms that Invest NI has secured to support businesses. It was anticipated that circa 40 delegates would attend.	The workshop was held in Loughry College on 19th February 2020, as part of the WBMF programme. 29 delegates attended the workshop, as follows: <table><tr><th>Delegate type</th><th>No.</th></tr><tr><td>Clients</td><td>12</td></tr><tr><td>Third Party Organisations</td><td>7⁵⁹</td></tr><tr><td>Invest NI staff</td><td>5</td></tr><tr><td>Speakers</td><td>5</td></tr><tr><td>Total</td><td>29</td></tr></table> Invest NI issued evaluation forms post-event and received 13 responses from delegates. 99% scored the event 3+ (rating 1-5, 5 is excellent), 87% scored 4+, and 66% rated the event as excellent (5). The monitoring suggested that the evaluation feedback indicated that the objectives of the event were met.	Delegate type	No.	Clients	12	Third Party Organisations	7 ⁵⁹	Invest NI staff	5	Speakers	5	Total	29
Delegate type	No.													
Clients	12													
Third Party Organisations	7 ⁵⁹													
Invest NI staff	5													
Speakers	5													
Total	29													
Drinks & Beverages Sector Workshop	The objectives of the activity (Drinks & Beverages Sector Workshop) were to: - Engage with the Drinks & Beverages Sector in relation to data and insights - Increase knowledge and understanding of trends in the Drinks & Beverage Sector - Raise awareness of the market information platforms that Invest NI has secured to support businesses. It was anticipated that circa 40 delegates would attend.	The workshop was held at the Innovation Factory on 24th October 2019, as part of the WBMF programme. 45 delegates attended the workshop, as follows: <table><tr><th>Delegate type</th><th>No.</th></tr><tr><td>Clients</td><td>31</td></tr><tr><td>Loughry College</td><td>1</td></tr><tr><td>Invest NI staff</td><td>10</td></tr><tr><td>Speakers</td><td>3</td></tr><tr><td>Total</td><td>45</td></tr></table> Invest NI issued evaluation forms post-event and received 11 responses from delegates. 100% scored the event 3+ (rating 1-5, 5 is excellent), 91% scored 4+, and 64% rated the event as excellent (5).	Delegate type	No.	Clients	31	Loughry College	1	Invest NI staff	10	Speakers	3	Total	45
Delegate type	No.													
Clients	31													
Loughry College	1													
Invest NI staff	10													
Speakers	3													
Total	45													

⁵⁹ This included 2xQUB, 2xCAFRE, 2xFSA and 1xDAERA.

Table 2: Achievement of Event Objectives														
Business Case Title	Objectives (per business cases provided)	Progress/Achievement against objectives (per monitoring provided)												
		According to the monitoring provided, the evaluation form comments indicated that the objectives were met. <i>“I found it very interesting. Useful to hear about trends, future predictions, and the services and help Invest NI can provide”.</i> <i>“A source of great exposure to general market insights”</i> <i>“More advertising for the event is necessary. Thanks to Audrey from CAFRE for informing us it was on”</i>												
FYE March 2021														
Health & Wellness Seminar	The objectives of the activity were to: - Engage with the entire Food & Drink industry in NI on a key emerging trend. - Increase knowledge and understanding of the Health and Wellness trend and how it impacts marketing activities and new product development. - Raise awareness of the market information platforms that Invest NI has secured to support businesses. - Provide opportunities for networking between businesses and with TPOs. It was anticipated that circa 80 delegates would attend, with a further 20 third-party organisations (TPOs).	The seminar was originally planned for 06 May 2020, but Covid-19 restrictions meant that it was not possible to deliver it as a physical event, and it was postponed to November 2020. The event was held digitally (via the Eventsair Platform) over three days (23rd, 25th and 27th) in November 2020, and the resource hub was available on demand to access additional relevant information. There were 308 delegates in attendance (120 on Monday, 95 on Wednesday and 93 on Friday) at the three-day seminar, with unique attendees as follows: <table><tr><th>Delegate type</th><th>No.</th></tr><tr><td>Clients</td><td>74</td></tr><tr><td>Third Party Organisations</td><td>32⁶⁰</td></tr><tr><td>Invest NI staff</td><td>24</td></tr><tr><td>Speakers</td><td>10</td></tr><tr><td>Total Unique</td><td>140</td></tr></table> Invest NI issued evaluation forms post-event and received 28 responses from delegates. According to the monitoring provided, there was 100% satisfaction with the event, and the evaluation form comments indicated that the objectives of the event were met. Invest NI considered that whilst digital delivery proved effective in achieving good reach, it was less effective in networking.	Delegate type	No.	Clients	74	Third Party Organisations	32 ⁶⁰	Invest NI staff	24	Speakers	10	Total Unique	140
Delegate type	No.													
Clients	74													
Third Party Organisations	32 ⁶⁰													
Invest NI staff	24													
Speakers	10													
Total Unique	140													
FYE March 2022														
Sustainability Seminar	The objectives of the activity were to:	The Consumer Attitudes to Sustainability: Food for the Greater Good Seminar was												

⁶⁰ Including: AHDB x4, CAFRE x5, DAERA x 5, Campden BRI x1, Dairy Council NI x1, Food Standards Agency x5, Hospitality Solutions NI x1, IGD x1, Lumina x1, University of Sri Lanka x1, The Food People x1, University of East Anglia x2, Ulster University x3

Table 2: Achievement of Event Objectives														
Business Case Title	Objectives (per business cases provided)	Progress/Achievement against objectives (per monitoring provided)												
	- Engage with the entire Food & Drink industry in NI on a key emerging trend. Aim for 80 business delegates and 20 industry representatives attending. - Increase knowledge and understanding of the Sustainability trend and how it impacts marketing activities and new product development. - Raise awareness of the market information platforms that Invest NI has secured to support businesses. - Provide opportunities for networking between businesses and with TPOs. The consumer attitudes and responses to the sustainability theme were the focus. Th Seminar was not trying to educate or inform the audience about climate change or its impact on the planet. Just inform them about what consumers say and do in relation to sustainability issues.	held digitally on 20th October 2021 by Event-ful on the Eventsair Platform. The event PPE completed by the FDCI Team stated that there were 167 registrations for the event, with 131 attendees. However, the following breakdown was provided: <table><tr><th>Delegate type</th><th>No.</th></tr><tr><td>Clients</td><td>104</td></tr><tr><td>Third Party Organisations</td><td>34⁶¹</td></tr><tr><td>Invest NI staff</td><td>22</td></tr><tr><td>Speakers</td><td>9</td></tr><tr><td>Total</td><td>169</td></tr></table> Invest NI issued evaluation forms post-event and received 8 responses from delegates. 100% scored the event 4+ (rating 1-5, 5 is excellent), with 3 delegates rating the event as excellent (5). According to the monitoring provided, the evaluation form comments indicated that the event objectives were met. <i>“Great event. Very well organised and timed. Having access to the resources after the event is brilliant for reflection. The platform was easy to navigate.”</i> <i>“A very informative event.”</i>	Delegate type	No.	Clients	104	Third Party Organisations	34 ⁶¹	Invest NI staff	22	Speakers	9	Total	169
Delegate type	No.													
Clients	104													
Third Party Organisations	34 ⁶¹													
Invest NI staff	22													
Speakers	9													
Total	169													
FYE March 2023														
Cost of Living Seminar	The objectives of the activity were to: - Engage with the entire Food & Drink industry in NI on this key issue. Aim for 80 business delegates and 20 industry representatives attending. - Increase knowledge and understanding of the implications of the cost-of-living crisis and how it impacts shopper behaviour, retail channel, foodservice, marketing activities and product mix. - Raise awareness of the market information platforms that Invest NI has secured to support businesses. - Provide opportunities for networking between businesses	The Consumer Insights Annual Seminar – Helping consumers navigate through tough times (cost of living) Seminar was held digitally on 9th November 2022 by Event-ful on the Eventsair Platform. The event PPE completed by the FDCI Team stated that there were 147 registrations for the event with 103 attendances, as follows: <table><tr><th>Delegate type</th><th>No.</th></tr><tr><td>Clients</td><td>75</td></tr><tr><td>Third Party Organisations</td><td>6⁶²</td></tr><tr><td>Invest NI staff</td><td>22</td></tr><tr><td>Total</td><td>103</td></tr></table>	Delegate type	No.	Clients	75	Third Party Organisations	6 ⁶²	Invest NI staff	22	Total	103		
Delegate type	No.													
Clients	75													
Third Party Organisations	6 ⁶²													
Invest NI staff	22													
Total	103													

⁶¹ Including representatives from AHDB, CAFRE, DAERA, Campden BRI, Dairy Council NI, Food Standards Agency, Hospitality Solutions NI, IGD, Lumina, The Food People, University of East Anglia, and Ulster University

⁶² Including representatives from CAFRE, DAERA, Dairy Council NI, Food Standards Agency, North West Regional College and Consumer Council.

Table 2: Achievement of Event Objectives																	
Business Case Title	Objectives (per business cases provided)	Progress/Achievement against objectives (per monitoring provided)															
	and with TPOs.	Attendance was below the target, and Invest NI noted the following: <i>“The industry was in turmoil at this time due to recovery from Covid, Brexit and the cost-of-living crisis and food inflation. We believe the attendance was lower than anticipated, as companies were firefighting and also the topic is quite anxiety-inducing. We also believe there is fatigue with digital delivery.”</i> Invest NI issued evaluation forms post-event, but only received 1 response, which was satisfied with the event.															
FYE March 2024																	
FDCI Events Programme	The objective of the proposal was for the FDCI team to deliver a series of events which were anticipated to: • Provide detailed category data and insight for several key sectors: Meat, Dairy, Bakery & Snacks, Convenience, Drinks and Plant-based. • Impart knowledge to the entire Food & Drink industry in NI on the fundamentals of consumer insight. • Inspire and raise awareness of the importance of putting consumers at the heart of innovation, product development and marketing. • Bring thought leadership on insight-driven innovation and growth • Raise awareness of the market information platforms that Invest NI has secured to support businesses. • Raise awareness of the Food & Drink Consumer Insights Service. The Events Programme proposed was a series of 6 sector-based webinars and an annual industry-wide webinar.	The annual seminar ‘What consumers want, what they really, really want ‘was attended by 111 delegates, and four webinars were delivered as follows: <table> <tr> <th>Webinar</th><th>Date</th><th>No. of delegates</th></tr> <tr> <td>Plant-Based Webinar, Mintel</td><td>23 June 2024</td><td>40</td></tr> <tr> <td>Convenience Meal Solutions, Kantar Ireland & Kantar UK</td><td>24 August 2024</td><td>22</td></tr> <tr> <td>Foodservice Food Insights, CGA by Nielsen IQ</td><td>25 January 2024</td><td>32</td></tr> <tr> <td>Healthier & Sustainable Vending, IGD</td><td>12 March 2024</td><td>112</td></tr> </table> Several suppliers were involved in the delivery of the FDCI Events Programme, including Event-ful, Mintel, Kantar Ireland, Kantar UK, CGA by Nielsen IQ, IGD, Contigo Management, Thefoodpeople, TRKR, Around Noon, Lumina Intelligence and CAFRE. The quality of the speakers at the webinars and seminar were considered to be excellent. The webinar topics were adjusted to reflect demand from Clients for particular categories and channels to be covered. An addendum to the programme was also approved to facilitate a collaboration opportunity with the Food Standards Agency NI on emerging trends and opportunities in the vending channel in Ireland and GB. Whilst Drinks, Meat and Dairy webinars were not delivered due to budget management requirements within the food and drink division. The webinars were considered to be an effective way to engage with the wider business base to impart category data and insights from the data platforms. The presentations and slide decks were also hosted on the Insights Hub and, therefore,	Webinar	Date	No. of delegates	Plant-Based Webinar, Mintel	23 June 2024	40	Convenience Meal Solutions, Kantar Ireland & Kantar UK	24 August 2024	22	Foodservice Food Insights, CGA by Nielsen IQ	25 January 2024	32	Healthier & Sustainable Vending, IGD	12 March 2024	112
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Table 2: Achievement of Event Objectives																										
Business Case Title	Objectives (per business cases provided)	Progress/Achievement against objectives (per monitoring provided)																								
		easily accessible to all food and drink companies. The webinars are also considered to be a useful way to drive engagement with the hub, where companies can find other trends and capability resources. The Consumer Insights Team worked with the Corporate Comms Events Team to deliver the event programme.																								
FYE March 2025																										
FDCI Events Programme	The overall objective was to use the toolkit of data platforms and the data partner contracts to deliver a series of events to communicate macro trends, sectoral and channel insight to the food & drink industry in NI. To include annual conference, webinars and podcasts. The objectives of the event programme were: • Webinars were to drive engagement with clients and the wider business base to impart category data and insights from the data platforms. Webinars and workshops were to provide detailed category data and insight for several key sectors: Meat, Dairy, Bakery, Drinks, Produce, Hot beverages or other categories as per demand. • The conference was anticipated to impart knowledge to the entire Food & Drink industry in NI on the fundamentals of using consumer insight. • The conference was to provide inspiration and raise awareness of the importance of putting the needs of retailers and consumers at the heart of decision-making. • To pilot a podcast series to explore in depth market trends and hot topics. • The Conference was anticipated to bring thought leadership on insight-driven innovation and growth. • Overall, to raise awareness of the market information platforms that Invest NI has secured to support businesses. • Overall, to raise awareness of the Food & Drink Consumer Insights Service.	6 webinars/workshops and 1 conference were delivered during 2024/25, as follows: <table> <tr> <th>Delivered by:</th><th>Date</th><th>Attendance⁶³</th></tr> <tr> <td>AHDB: Demand & Opportunities for Red Meat Webinar</td><td>19 June 2024</td><td>Live: 5 On demand: 27 Total: 32</td></tr> <tr> <td>AHDB: Consumer Reputational Landscape Meat & Dairy Webinar</td><td>20 Jun 2024</td><td>Live: 6 On demand: 12 Total: 18</td></tr> <tr> <td>Kantar Ireland and UK: Deep Dive into the Bakery Sector Webinar</td><td>31 Oct 2024</td><td>Live: 31 On demand: 6 Total: 37</td></tr> <tr> <td>Kantar: NI Market Overview Webinar</td><td>Scheduled 27 Feb 2025</td><td>Live: 62</td></tr> <tr> <td>Kantar RoI: Produce Category Webinar</td><td>13 Mar 2025</td><td>Live: 7⁶⁴</td></tr> <tr> <td>Workshop - IWSR: Distillers Network/Conference Global Spirits Trends</td><td>Delivered 17 Sept 2024</td><td>Live: 48 Not available on demand due to IWSR sharing restrictions. Total: 48</td></tr> <tr> <td>Conference - What retailers really, really want: Multiple Speakers including Kantar, IGD, Aldi, Insight Traction, TRKR, Food2Market, Lumina, O'Connell Retail, thefoodpeople</td><td>Delivered 16 Oct 2024</td><td>Live: 126 On demand: 45 Total: 171</td></tr> </table> Live attendance was as follows:	Delivered by:	Date	Attendance ⁶³	AHDB: Demand & Opportunities for Red Meat Webinar	19 June 2024	Live: 5 On demand: 27 Total: 32	AHDB: Consumer Reputational Landscape Meat & Dairy Webinar	20 Jun 2024	Live: 6 On demand: 12 Total: 18	Kantar Ireland and UK: Deep Dive into the Bakery Sector Webinar	31 Oct 2024	Live: 31 On demand: 6 Total: 37	Kantar: NI Market Overview Webinar	Scheduled 27 Feb 2025	Live: 62	Kantar RoI: Produce Category Webinar	13 Mar 2025	Live: 7 ⁶⁴	Workshop - IWSR: Distillers Network/Conference Global Spirits Trends	Delivered 17 Sept 2024	Live: 48 Not available on demand due to IWSR sharing restrictions. Total: 48	Conference - What retailers really, really want: Multiple Speakers including Kantar, IGD, Aldi, Insight Traction, TRKR, Food2Market, Lumina, O'Connell Retail, thefoodpeople	Delivered 16 Oct 2024	Live: 126 On demand: 45 Total: 171
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⁶³ Per Post Activity Evaluation.

⁶⁴ Per Deep Dive into the ROI Fresh Produce Sector. 7 attendees (including x1 Invest NI, x1 CAFRE and x1 NWRC Foodovation) from 24 registrations.

Table 2: Achievement of Event Objectives			
Business Case Title	Objectives (per business cases provided)	Progress/Achievement against objectives (per monitoring provided)	

Appendix VI – Insights One2One Activity

RDS Activity

RDS Activity over the 6 years (2019-25) has been as follows:

Table 1: RDS Activity		
Year	No. of RDS	Unique businesses supported
2019/20	42	38
2020/21	88	56
2021/22	81	48
2022/23	80	45
2023/24	118	65
2024/25	152	85
Total	561	164

The Evaluation Team's analysis of the annual activity information provided indicates that 164 unique businesses have been supported over the 6 years.

The FDCI Team outlined that the type of information requested through the RDSs typically fell under five categories, as follows:

1. Market & category size, performance and growth rates.
2. Macro-Trends (e.g. GLP-1, Protein Enhanced Food, etc.).
3. Retailer & Shopper Information / Consumer Profiling.
4. Primary Consumer Survey Data (VYPR Platform).
5. Global Spirit Market Data (IWSR Platform).

Market Intelligence Clinic/Workshops

The objective of the monthly MI Clinics was to provide a market intelligence service to Tracked and WBB Clients, TPOs, Students and non-Clients. These customers could book into the clinic for a 1-hour appointment with research follow-up provided by email. Clinic appointments were generally for pre-trading or early-stage businesses. The clinic was delivered by 1 representative from BIC and 1 representative from FDCI. The service was launched in September 2019 and had been delivered in person in the Information Hub at CAFRE's Loughry Food Technology Centre. The Clinics were delivered digitally during Covid-19 restrictions and returned to in person-sessions in April 2023. The colleges, SRC and NWRC, were added to the MI Clinic rota from 2023/24 and 2024/25, respectively.

Activity since 2019/20 has been as follows:

Table 2: MI Clinic Activity				
Year	No. of clinics held	Total no. of participants	Business participants	Unique business participants
2019/20	9	14 ⁶⁵	12	12
2020/21	12	11	8	8
2021/22	12	28	26	25
2022/23	12	24	12	12
2023/24	14	41	32	32
2024/25	14	25	25	24
Total	73	143	115	102

The 2020/21 monitoring report noted that whilst delivery of the MI Clinic service required minimal Invest NI resource, it had been well received by Clients, Students and TPOs, with some excellent feedback received. It was also highlighted that it was beneficial to the FDCI Team to have non-priority Clients serviced in this way via a monthly clinic so that resources were not diverted away on a day-to-day basis. It was also considered to be a good way to keep track of innovations and potential artisan and start-up businesses. The MI Clinics were

⁶⁵ Almost all attendees were F&D businesses, with 1 DAERA attendee and 2 CAFRE attendees.

also considered to have strengthened the collaborative working with CAFRE, and several of the CAFRE Food Technologists had availed of the service to provide input into technical and R&D projects that they are working on for industry.

Data Purchase Agreements

In 2019/20, the FDCI Team worked collaboratively with the Technical Advisory Unit on a pilot initiative to use the Technical Development Incentive scheme (TDI) for Data Purchase for New Product or Process Development. This was used on 2 occasions:

Table 3: DPG Awards - 2019/2020			
Project Approval Date	Client	Project	Grant
04/06/2019	Davison Cannery Ltd	Purchase of Kantar Data to determine market opportunity for seasonal lines	£3,780
18/01/2020	Crust & Crumb Bakery Ltd	Purchase of Kantar data and use of Levercliff Insights Consultants	£7,283
Total			£11,063

Invest NI outlined that both projects were successful in helping companies to demonstrate a market opportunity for a new product listing and providing the information to help sell the NPD to retailers (one client secured an Easter listing with Lidl, and one client secured a Sainsbury listing for a new product range).

During 2020/21, the FDCI Team worked collaboratively with the Food and Drink Client Executives on a pilot initiative to use the Mini GAP for Data Purchase of up to £10k of funding. This was availed of on 4 occasions during 2020/21:

Table 4: DPG Awards - 2020/2021			
Project Approval Date	Client	Project	Grant
13/10/2020	Mash Direct	Supported the company in purchasing Dunnhumby data to support Tesco GB listings.	£4,862
08/12/2020	GM Marketing	The company planned to purchase Nielsen data for Free'ist biscuit NPD	£10,000
15/12/2020	Punjana	Purchase of Kantar and Morrison loyalty card data for the tea category	£10,000
16/02/2021	Good 4 U	Category data from IRI and Consultancy support from Purple Basil.	£6,085
Total			£30,947

Invest NI outlined that the clients identified the specific need for market data to support NPD and defend product listings with major retailers. By using recognised market data, it was anticipated that the companies would be able to present to national buyers and gain market share in external and export markets.

These pilots were used to refine the Data Purchase Grant (DPG), which was then approved for use from April 2021 onwards. As part of the DPG, Food and Drink companies could avail of up to £10k grant towards data purchase and consultancy support for data scoping and interpretation:⁶⁶

- £10k cap per grant.
- Grants have a 14-month earning period and an 18-month drawdown period.
- Only 2 eligible expenditure items – Data Purchase and Insights Consultancy.
- The scheme allows 3⁶⁷ x £10k grants over 3 years with a reducing support rate – 50%, 40%, 30%.
- Consultancy will only be supported at 30% rate consistent with other consultancy support across Invest NI products.
- Grant will be subject to De Minimis limits.

⁶⁶ Source: FDCI Master Presentation 2025-26 incl DPG

⁶⁷ Large companies (EU definition) can only avail of this grant on one occasion. Data Grant rate 50%/ Consultancy grant rate 30%. Requires Invest NI Director approval.

- The Client will complete an application form and provide a quotation through the Invest NI portal.

1 DPG was issued in 2023/24, and the company (Good 4 U) did not draw down any monies. 4 further DPGs were issued in 2024/25:

Table 5: DPG Awards - 2024/2025	
Clients	Amount Offered – 2024/25
Mash Direct	£3,533
GM Marketing	£10,000
Big Pot Co Ltd	£1,808
Whites Speedicook Ltd	£8,265

A summary of the DPGs awarded, the value of grants offered and paid across the period was as follows.

Table 6: DPG Awards - 2019/2020 to 2024/25							
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
Number of DPG awarded to Clients	2	4	0	0	1	4	11
Total Value of Grant offered:	£11,063	£30,950	-	-	£3,920	£16,558	£62,491
Total Value of Grant paid:	£11,063	£20,348	-	-	-	£16,528	£47,939
% paid	100%	66%	-	-	0%	99.8%	77%

Of note, the 7 businesses received support through the 11 DPGs.

Delegate support for FBDT Exhibitions & Programmes (GB&ROI)

The FDCI Service provided delegate support for attendance at exhibitions and programmes across the British Isles, as follows:

Table 7: Delegate support for FBDT Exhibitions & Programmes (GB&ROI)		
Year	Exhibition/Programme	No. of Clients
2019/20	-	0
2020/21	-	0
2021/22	Gifted	8
	International Food & Drink Event, London	12
	Grow with Aldi	5
	SBDP	7
	Total participations	32
	Unique businesses supported	Not known
2022/23	Grow with Aldi	5
	ScotHot	8
	Total participations	13
	Unique businesses supported	13
2023/24	FSD	8
	ScotHot	7
	Grow with Aldi	31
	SBDP	23
	Co-Op MTB	9
	Total participations	78
	Unique businesses supported	72
2024/25	Gifted	8
	TickEat	7
	Total participations	15
	Unique businesses supported	15
Total participations		138
Unique businesses supported		86

Delegate support for Trade Team Exhibitions & Programmes (International)

The FDCI Service provided delegate support for attendance at international exhibitions and programmes, as follows:

Table 8: Delegate support for Trade Team Exhibitions & Programmes (International)		
Year	Exhibition/Programme	No. of Clients
2019/20	-	0
2020/21	-	0
2021/22	-	0
2022/23	FoodEx Japan	7
2023/24	Gulfood (Dubai)	5
2024/25	Gulfood (Dubai)	5
	Private Label Manufacturers Association Trade Show	5
	Prowein International Trade Fair for Wines & Spirits	4
	Total participations	14
	Unique businesses supported	12
Total participations		26
Unique businesses supported		19

Across the period under review, 99 unique businesses received support for attendance at GB/ROI and/or International Exhibitions.

Appendix VII – Insights Academy Activity

The FDCI Team tested various capability programmes to address the skills gap in the use of data and insight to see what might add the greatest value to the client portfolio. This included the delivery of:

- Pitch Optimisation Programme, which was a Trade Division programme that the FDI Team tailored for Food & Drink. It was not funded from the FDCI budget.
- TickEat was a collaborative programme with the Food Business Development Team (as the lead partner). The FDCI Team supported the project delegates with access to data on the Global Travel Retail Sector and contributed £1,440 towards the event, which had to be delivered digitally due to Covid.
- Tesco supplier events with dunnhumby in 2022 and 2023.

Following these, the FDCI Team designed the Growth Through Insights (GTI) Programme, which has been delivered since 2023/24.

Invest NI outlined that a key learning from the GTI 2023/24 pilot was that some of the new product development projects were already quite far advanced, and the concept testing results indicated some re-engineering was required to make the product innovations better aligned with consumer needs. It was therefore proposed that a precursor to the ‘Growth through Insights’ programme should be developed to horizon scan for inspiration for innovation and to embrace ideas from global cuisines and the most innovative grocery retail outlets.

During 2024/25, the FDCI Team proposed to contract a delivery partner to lead a delegation of 10 NI food and drink companies on a Food Safari to London, based on the theme of healthy, sustainable food, culminating in attendance at the Speciality & Fine Food Show in London Olympia Exhibition Centre, 10 September 2024. The FDCI Team considered London to be a hotspot for global cuisines and cutting-edge culinary excellence, and it was anticipated that there would be innovations in grocery, retail and foodservice that could provide inspiration for NI food and drink companies to develop new products based around this theme, and grow NI’s capability in the supply of convenient, healthy, sustainable food. It was hoped that at least five of these companies would then be inspired to apply for the GTI programme to concept test one of their NPD ideas emanating from their attendance on the food safari.

The Food Safari that was anticipated to be delivered during 2024/25 was not delivered due to resource constraints within the FDCI Team.

The overall objective of the Insights Academy was *‘To improve the capability of key companies to interpret and utilise data and insights to drive growth and competitiveness’*.

Growth Through Insights (GTI) Programme

Growth Through Insights (GTI) was a 15-week innovation programme built around market data and consumer insight, for Northern Ireland’s leading food & drink manufacturers. The GTI Programme was to be a blend of group workshops in person and online, one-to-one mentoring sessions with each delegate company (again, this was anticipated to be delivered through a blend of online and in-person at their premises). It was also anticipated to involve the testing of a new product concept with real shoppers in their category.

The GTI Programme was designed to help those companies taking part to harness the power of market data and bespoke consumer insight to increase their chances of commercial success by:

- Identifying the commercial opportunity
- Validating the consumer need and Value proposition
- Getting onto the shelf and staying there.

The GTI Programme involved taking a real new product development (NPD) through the process. At the end of the 15-week programme, the participating businesses were anticipated to have:

- Developed an NPD concept that has then been tested, validated and fine-tuned by real consumers in their category.
- A greater understanding of the power of insights and market data in the NPD process, and how to access it through Invest NI.
- Introduced their cross-functional team to an established NPD process, which can be repeated for future innovations; and
- The basis of a compelling pitch to take to GB Retail Buyers.

The eligibility criteria were as follows:

- Turnover of >£1m
- Growth potential of >10% pa
- Financially stable
- Currently >25% external sales
- To have an established management structure.

Other criteria included:

- Distribution already established in GB.
- EPD or NPD consumer projects in the pipeline.
- Must have a sales manager/national account manager already established within the company.
- Senior Management buy-in for the project and programme.
- Key staff to be available to take part in the programme (Sales & Marketing, NPD).
- Must complete Invest NI Innovate NI audit before starting the programme.

Recruitment onto the programme was to be competitive against a scoring matrix designed by the Food & Drink Consumer Insights and Food Business Development Teams. Each cohort was to include up to 5 companies in non-competing categories. The FDCI and FBD teams were to provide wrap-around support to the programme delegates in terms of access to data and insights, and introductions to buyers and listing opportunities during the programme.

The main objective for Invest Northern Ireland in the design and delivery of the GTI Programme was to accelerate the growth of a small number of high-potential food & drink companies through insights-driven innovation. These companies were then anticipated to be role models with case studies to demonstrate the effective use of insights in innovation and business growth.

The deliverable was to have 4 companies complete the Growth through Insights Programme per annum.

The business cases outlined the following impact measurements:

- Number of Existing Product Development (EPD) projects launched.
- Value of sales from EDP.
- Number of New Product Development (NPD) projects launched.
- Value of sales from NPD.
- New customer listings.
- New market entry.

NB: Concerning impact measurement, the FDCI Team noted that as GTI is a concept testing programme, it was not anticipated that these impacts could be measured for at least 6-12months post programme completion.

In total, nine Invest NI clients were recruited onto the 15-week intensive insight-driven innovation programme for concept testing of innovation activity and new products during 2023/24 (five) and 2024/25 (four). It was delivered by TRKR and Food2Market.

In June 2024, the five businesses (Grahams Bakery, Prep House Limited, Whites Speedicook Ltd, TS Foods and Mulrines) from the 2023/24 cohort completed an evaluation survey issued by the FDCI Team. Key findings included:

- Four businesses considered the programme to be very helpful, whilst one stated it was ‘very unhelpful’.

As a small manufacturer, we do not have the skill set required to maximise our NPD. The scheme was a great reminder of how to research best, how to present best, and how to deliver exactly what the buyer needs to see when you pitch the product to them.

As a company, we have previously lacked structure in the process of NPD, having a mostly 'me-too' style approach. The GTI programme has allowed us to review our practices in-house and has opened our eyes to a new way of thinking. Hopefully, going forward, this will lead to more successful NPD, as we now see the importance of using insights to try to get it right.

- Four businesses felt that the materials advertising the programme were appropriate, with 3 viewing them as ‘very appropriate’.

Everything about the advertising was accurate; in fact, the programme over-delivered vs expectation.

Overall good, only thing I would suggest is that it wasn't clear at the outset of the programme that there would be a cost involved for participating companies, i.e. the cost of the survey responses.

The initial webinar was very insightful and laid out in full the process that would be taken. It was also good to get a brief overview of insights and how they can be helpful to a business - a great way to pique our interest. Knowing that there were also only limited spaces available made me want to be a part of the initial intake more!

- Similarly, four businesses felt that the format of the programme, including workshops and one-to-one sessions, was appropriate, with 3 viewing it as ‘very appropriate’.
- Four businesses considered the content of the programme, including Market Data & Insight, Insight Driven Innovation, and Commercialisation, to be very relevant.
- Four businesses felt that the duration of the programme was appropriate, with 4 viewing it as ‘very appropriate’.
- Four businesses were satisfied with the hybrid delivery of the programme (blend of in-person and digital workshops and one-on-one sessions).
- All five businesses felt that the delivery partners were very informative.
- All five businesses felt that the programme was very beneficial to their business. One business stated, “*We have completely rethought our delivery of sachets and are moving to a higher level of packaging than originally considered. This will be more sustainable and ultimately will deliver us a strong ROI and a good sustainability rating with our customers.*”
- Two businesses suggested that they had quantifiable outcomes from participating in the programme at the time of the survey:
 - Listed in 313 Sainsbury's stores nationally with 3 lines, which were live in-store; and
 - Introduced learnings from the GTI process into new product developments and plan to launch new products in the coming period.
- All five businesses stated that they were very encouraged to work with Invest NI in the future.

Appendix VIII - The Insights Hub

Before the introduction of the Insights Hub, during Covid-19 the FDCI Team created a SharePoint site to serve as an easy-to-access library of information that clients could access when convenient to them. Additionally, the information was catalogued within the site to guide users to the appropriate content that was most relevant to their requirements.

The FDCI Team outlined that it became apparent early in the development of this project that the sheer volume of information being released as the crisis unfolded was proving overwhelming for the client base. As such, the FDCI Team initiated a weekly summary of all the salient information gathered from the shared reports, which was emailed to clients. The FDCI Team considered that taking the initiative to produce these summaries highlighted the skills within the team to disseminate and present this information in a meaningful and useful manner for clients, as well as providing a solution to the contractual issues of sharing full market intelligence reports from their data providers with clients.

Over 8 months (March-October 2020), 49 businesses (of the 109 registered) accessed almost 1,500 reports/files on the SharePoint site, 24 of which each accessed more than 10 files/reports.

The Insights Hub was launched in April 2023 as a repository for the video recordings and slide decks from delivered events going back over the previous three years, and other content from data partners, with their permission to share. In addition, the hub contains some training materials that companies can use in relation to category management, and case studies that have been developed with some key client companies to raise awareness of the FDCI service and to demonstrate the value of using data and insight to grow businesses.

The key objective of the Insights Hub is to use an online portal to widen the reach of market trends and consumer intelligence with the entire NI food and drink industry. This is a self-serve portal providing access to reports, presentations, podcasts and bespoke content curated by our data partners and internally.

The hub is only accessible to verified NI food and drink companies, but is not restricted to Invest NI Clients, so it can be used by the wider food and drink business base. It is not available to consultants or third-party organisations at the request of data partners. The 2024/25 business case noted that there were 152 registered users of the hub, with new users typically coming on board after the delivery of events to access the presentations. The hub is an “always on” service and is useful as a referral tool for engagement with companies that attend the market intelligence clinics.

The hub performance has been as follows during 2023/24 and 2024/25:

Table 1: Insights Hub Performance/Usage Metrics			
		2023/24	2024/25
The Insights Hub – Landing Page	Total users	204	104
	Page views	356	176
	Sessions	381	170
The Insights Hub – Portal	Registered users	152	201
	Active users	95	138
	Not active users	57	63
	Hub views	485	338
	Engagement rate	57.84%	69.80%
	User engagement	05:53:58	06:05:48

Invest NI’s Digital Communications Executive noted that *“The engagement rate is very high, meaning the content is of real value to those who access it. Anything between 1% and 3.5% is considered an average engagement rate, and ours is sitting at 69.80%.”*

The Insights Hub was an in-house project, developed in collaboration with the Digital Comms team, which provided support to the FDCI Team in terms of user registration management and uploading of new content. The FDCI Team notes that it is, however, a basic repository, with issues such as design and dedicated resources requiring additional support to enhance the hub and drive usage.

Appendix IX – FDCI Team Attendance at Conference/Seminar/Workshop/Meetings

The following table provides an overview of the FDCI Team's attendance at conferences/seminars/workshops/meetings across the period, and the associated objectives of attendance where provided.

Table 1: FDCI Team attendance at conference/seminar/workshop/meetings	
Business Case Title	Objectives of Attendance where provided (per business cases provided)
FYE March 2020	
AHDB project planning	The Agri-Food Strategy had identified targets for the Food & Drinks Sector. By attending the conferences and site visits, it was anticipated that the FDCI Team would gain valuable knowledge and insight from both the providers and speakers. The information taken away was anticipated to facilitate the FDCI Team in assisting Invest NI’s clients to be able to realise the challenging targets of the Agri-Food Strategy.
MCA Food2Go conference	
IGD Live	
IGD Workshop	No stated objective(s).
MCA Qtrly Review	No stated objective(s).
FYE March 2022	
IFE attendance	The Agri-Food Strategy had identified targets for the Food & Drinks Sector. By attending the conferences, it was anticipated that the FDCI Team would gain valuable knowledge and insight from the providers, conference speakers and exhibitors. The information taken away was anticipated to facilitate the FDCI Team in assisting Invest NI’s clients to be able to realise the challenging targets of the Agri-Food Strategy.
Lumina Food2Go Conf	
Campden Courses	The objective of the proposal was for the FDCI Team to be upskilled in Food Law and Nutritional Labelling to be able to provide an enhanced service to Food and Drink Clients. It was considered that an entry-level course was required in each topic rather than any detailed sector-specific or in-depth knowledge.
IGD Course	The objective of the proposal was for the FDCI Team to be upskilled in Shopper Activation to be able to provide an enhanced service to Food and Drink Clients.
FYE March 2023	
Scothot	It was anticipated that the FDCI Team would gain valuable knowledge and insight regarding the competitive landscape of a key target market through attendance at these events. The information taken away was envisaged to facilitate the FDCI Team in assisting Invest NI’s clients to be able to increase external sales and consider new product development opportunities. The FDCI team would have the opportunity to engage with other industry bodies and existing and potential data providers.
FSD&IGD (Farm Shop & Deli Show, and IGD Insight and Impact)	
Lumina Food Strategy Forum FSF & StudyTour	The Agri-Food Strategy had identified targets for the Food & Drinks Sector. By attending these conferences and events, it was anticipated that the FDCI Team would gain valuable knowledge and insight from the conference speakers and exhibitors. The information taken away was anticipated to facilitate the FDCI Team in assisting Invest NI’s clients to be able to realise the challenging targets of the Agri Food Strategy.
Grocer Conference	
Lumina FSF Dec 22	
IGD & World Plant Expo (Conference/Workshop)	
IGD Shoppervista (Seminar)	
IGD Shoppervista (Seminar)	
FYE March 2024	
FSF Study Tour Dec 23	The Agri-Food Strategy had identified targets for the Food & Drinks Sector. By attending these conferences and events, it was anticipated that the FDCI Team would gain valuable knowledge and insight from the conference speakers and exhibitors. The information taken away was anticipated to facilitate the FDCI Team in assisting Invest NI’s clients to be able to realise the challenging targets of the Agri Food Strategy.
FSF Study Tour July 23	
	The Agri-Food Strategy had identified targets for the Food & Drinks Sector. By attending the conferences and events, it was anticipated that the FDCI Team would gain valuable knowledge and insight from the providers, the conference speakers and exhibitors. The information taken away was anticipated to facilitate the FDCI Team in assisting Invest NI’s clients to be able to realise the challenging targets of the Agri-Food Strategy.

Table 1: FDCI Team attendance at conference/seminar/workshop/meetings	
Business Case Title	Objectives of Attendance where provided (per business cases provided)
	The Lumina contract provided 2 tickets to the Food Strategy Forum briefing. For the December event, the 2nd ticket was offered to a local business owner who was keenly exploring the foodservice sector for trends that she could build into her NPD process. The business owner made her own travel and accommodation arrangements. Lumina agreed for the 2nd ticket to be used in this way, and this was a pilot to see if this was something that the FDCI could facilitate for other client companies.
FYE March 2025	
Lumina FSF June 24	The Agri-Food Strategy had identified targets for the Food & Drinks Sector. By attending the conferences and events, it was anticipated that the FDCI Team would gain valuable knowledge and insight from the providers, the conference speakers and exhibitors. The information taken away was anticipated to facilitate the FDCI Team in assisting Invest NI's clients to be able to realise the challenging targets of the Agri-Food Strategy.
Lumina FSF Dec 24	
FarmShopDeli	
Lumina FSF March 25	
MCA Food2Go Conf	

Appendix X – Scotland Food & Drink Membership

The following costs and benefits are associated with Scotland Food & Drink Membership.

Table 1: Membership Details		
Membership Tier	Annual fee	Benefits
Startup - The Startup Membership is open to businesses in the first 12 months of trading only, with an annual turnover of up to £100,000.	£120	- Scotland Food & Drink member certificate, and use of the member logo, as provided - Monthly member-only newsletter - Access to the online member portal - Unlimited access to the industry insights platform, The Knowledge Bank - Dedicated membership support line for advice, guidance and signposting - Exclusive discounts from Supply Chain Affiliate Members and Professional Services Affiliate Members - Direct connections to a Regional Food Group - Invitations to regional Meet the Buyer events - Regular industry updates delivered to their inbox - Expert guidance and business referrals - Opportunity to feature in the monthly Member Spotlight
Micro - The Micro Membership is open to businesses with an annual turnover of £100,000 to £300,000.	£345	All Member benefits listed above plus: - Special discounts on Scotland Food & Drink events, including priority access to booking - Networking at regional events - Discount on SALSA Go scheme
Emerging – The Emerging Membership is open to businesses with an annual turnover of £300,000 to £1million.	£720	All Member benefits listed above plus: - Discount on Brand Reputation Compliance Global Standards (BRCGS) certification - Dedicated Scotland Food & Drink Business Development Manager
Scaling – The Scaling Membership is open to businesses with an annual turnover of £1million to £5million.	£1,430	All Member benefits listed above plus: - Use of Scotland Food & Drink's Ratho office - Access to Insights Manager - Access to the UK Markets Manager
Accelerating – The Accelerating Membership is open to businesses with an annual turnover of £5million to £15million.	£2,140	All Member benefits listed above plus: - One free entry to The Excellence Awards - One free ticket to Scotland Food & Drink's Industry Conference - Invitation to peer-to-peer networking events - Invitation to regional and national Policy Roundtables - Invitation to Leadership Dinners
Strategic – The Strategic Membership is open to businesses with an annual turnover of £15million+.	£3,300	All Member benefits listed previously, plus: 1:1 with Scotland Food & Drink CEO - Opportunity to attend Strategy Roundtables
Hospitality – The Hospitality Membership is open to businesses of all sizes.	£120	- Member certificate, and use of the Member logo - Access to food and drink industry insights - Discount on professional services - Opportunities to connect with Producer Members - Direct connections to their Regional Food Group, where applicable - Exclusive Affiliate Member discounts - Dedicated Membership support line for advice and guidance

In addition to food and drink membership, the industry body offers affiliate membership to professional businesses that support the food and drink sector, as follows:

Table 2: Affiliate Membership Details		
Affiliate Membership Tier	Annual fee	Benefits
Small – The Small Affiliate Membership is open to businesses with an annual turnover of £1million.	£720	• Opportunity to feature in the Scotland Food & Drink monthly Member Newsletter • Industry update newsletter • Business listing on the Scotland Food & Drink website • Scotland Food & Drink Member Certificate, and use of the member logo, as provided • Access to offers from other affiliate members • Regional networking events • Unlimited access to the industry insights platform, The Knowledge Bank • Support from a dedicated Business Development Manager, plus an introduction to the wider Business Development team • Opportunity to create online toolkits for producer members • Showcase at Scotland Food & Drink events for a discounted price, as well as free or discounted attendance • Invitation to national engagement events • Promotion of their events and webinars on the Scotland Food & Drink website • Create an exclusive member offer for producer members • Use of Scotland Food & Drink's Ratho office • Links to the Scotland Food & Drink Partnership
Medium – The Medium Affiliate Membership is open to businesses with an annual turnover of £1million to £5million.	£1,430	All Small Affiliate Member benefits listed above, plus: • Opportunity to create webinars for producer members • Opportunity to collaborate with the Knowledge Bank team • Invitation to speak at key industry events, where applicable
Large – The Large Affiliate Membership is open to businesses with an annual turnover of £5million	£2,140	All Small and Medium Affiliate Member benefits listed above, plus: • Invitation to leadership dinners • One free ticket to Scotland Food & Drink's Industry Conference • 1:1 with Scotland Food & Drink CEO

Appendix XI – Feedback Received by the FDCI Team

The Evaluation Team reviewed over 100 feedback emails received by the FDCI Team from a range of sources, including:

- Food and drink sector businesses.
- Data providers.
- Academic institutes, including QUB and CAFRE.
- Food Standards Agency; and
- Other Invest NI staff.

Key findings from the feedback included:

- The emails highlighted the prompt and efficient support provided by the FDCI Team, alongside the scale of high-quality information that was available to access and/or provided by the FDCI Team and the analysis undertaken by the FDCI Team.
- In particular, the breadth of data sources available and their contribution to buyer meetings, pitches and roadshows was emphasised.
- Businesses highlighted how the service supported better decision-making, in particular for exports and market selection, and how it strengthened meetings with buyers and improved buyer confidence.
- Whilst the feedback does not indicate the direct linkage of the FDCI Team's support to new sales, several businesses highlighted that they were hopeful that the insights provided would help to secure new product listings or distribution channels in the future.

An overview of some of the feedback received by the FDCI Team is outlined below.

QUB	<i>"I too think it's fantastic for QUB to be working with Invest NI to benefit our Food and Drink sector, and I'm very grateful to the FDCI Team for the help and support throughout this process."</i> <i>"I don't think anyone else provides such access to market insights as much as the FDCI team and BIC."</i>
CAFRE	<i>"Many thanks for the presentations and information – there are some excellent slides that I can use for class and give me some great ideas. Interesting to note changing consumption habits of millennials – think health and fitness is taking over."</i> <i>"Thank you both very much for this useful information! It's a great help to me!"</i>
Invest NI	<i>"Just a quick note of congratulations and to acknowledge your hard work and indeed the tremendous success of the Consumer Insights Seminar at Loughry this week. The attendees I spoke to found the entire event informative, slick, and the choice of speakers superb!"</i> <i>"Excellent information presented this morning. Really top class. Well done. I'm sorry I missed the first two days, but I will catch up later. This type of real market insight is invaluable for innovative businesses."</i> <i>"Thank you again for the invitation to attend the Consumer Insights conference yesterday. I thought it was an excellent event that was clearly well-designed and expertly managed by the FDCI Team. The clients were all very engaged, the speakers were all insightful, and the energy levels were still high well into the afternoon.... which represents a great success!"</i>
Food Standards Agency	<i>"Just to say that I watched the Evolution of Health webinar over lunch today. It was excellent. Thank you for forwarding."</i> <i>"I just wanted to say thank you for inviting the FSA to be part of the Health and Wellness Seminar. I really enjoyed today, and it was lovely to meet the other speakers. It was lovely to work with you and Event-ful on the event, and I thought everything went very smoothly."</i>

Businesses

“MCA is a great subscription to have, and we have already had some uses out of it. We had Costa Coffee visiting last week and were able to utilise some of the reports the team had sent.”

“The ALDI meeting went well, and they were very interested in the market data I had pulled out, particularly the Kantar data.”

“We received various data in 2023 (China Hot Drinks & Turkey Hot Drinks, Canada Hot Drinks, Kantar 52 weeks GB and NI Hot Bevs & Tea). The data was provided following a request from us pending a meeting with a potential client within that region, and following a conversation with a trade show/ Invest NI colleague. Understanding the value of any potential market is key, especially for our business, where resources can be limited from an export perspective. Therefore, it is important to understand if investing time, resource and potentially financially (initially) would be justified in the short to medium term. The information provided, therefore, adds value as it allows us to understand if that market would be suitable for us to invest in, by understanding consumer behaviours, the retail landscape and how competitive it would be.

As described above, identifying new markets that would be worthwhile exploring further is key for a business of our size, if we want to ensure the right amount of time and resource is implemented. We are also able to build credibility when meeting a potential distributor or customer in any region, as we have the information about the markets in which they operate.

The Export information provided above cannot necessarily be linked to any tangible sales at this stage, given how long it can take to find a distributor that suits the needs of our business. However, we are still exploring and continuing good conversations with the relevant In-Region Invest NI colleagues.

The GB & NI data, however, has allowed conversations regarding additional distribution in GB to be discussed, as it has helped to build a more collaborative relationship with some customers outside of NI, where our market share is relatively small.

Any information that Invest NI has provided us has been useful in helping us to develop our short to medium-term sales strategies. We already Export to various countries around the World but would still only account for a relatively small proportion of our turnover, hence having to be selective in the new markets that we want to develop in. The information provided allows us to understand the potential size of those opportunities, but is often lacking anything regarding key distributors or clients that already have experience in working with Northern Ireland suppliers within their respective regions. As mentioned, finding a distributor that would suit the needs of our business and manage our brand in such a way that we would expect it to be managed in our home markets is a key part of our export strategy.”

“I just wanted to send a note to thank you for including us in the excellent growth through insights programme. We really enjoyed the experience and found it hugely beneficial. Thank you for the time you put in with us and for all your help and guidance. We are already using the tools from the programme in our business and are delighted at the shift towards the right conversation, the consumer need, that is really helping to define our pipeline.”

“That’s fantastic – much more information than I was expecting, and you even did all the work for me! Thanks for your help; that gives us plenty to work on.”

“The companies found the information so useful. Thank you so much! They all mentioned how useful it was to get the information, and how proactive INI was to send it in advance of the show.”

“Just following up to give you a quick update on the meeting with Tesco Ireland last week. All 3 of our proposals were positively received by the Buyer, with a further session to be planned with the Product Developer at HO in the coming weeks. The Buyer was very impressed with the presentation and the dataset from dh so once again, thank you for your help. Most likely, if all goes ahead (+ commercials are agreed!), we will make the proposed recommendations in line with their Winter range change in Sept / Oct.”

“Thanks so much for going over the deck and adding an extreme amount of value.”

“Just wanted to say thanks very much for your hospitality on Wednesday – it was very much appreciated, and the keenness and help offered by you and the whole team was very much appreciated... look forward to building the relationship further! Also, great shout on ADHB beef... I did know that they made some Kantar data available, but assumed it was what we already had... just goes to show you should never assume.”

“We reviewed the Vypr results and agree all are fairly self-explanatory and have provided some direction on naming and claims, especially around simplicity of high in protein message.”

“Thanks again for the Wagyu help. The meeting on Thursday went well. Pitched it just right and fingers crossed further discussions happen.”

“Thanks for continuing to send through the data and insights regarding COVID-19 and the Food Industry – I am finding

these most useful.”

“Just a note to say thank you for the excellent workshops and access to the Knowledge Bank. I found the sessions incredibly insightful and genuinely valuable. I’ve already downloaded a good deal of content for future reference!”

“I am in the middle of writing a feature on the current state and future of the spicy condiment market, so these data insights have been invaluable. I am also pitching to Aldi next week, so these stats are just what we need.”

“Thanks again for taking the call and for the files. Some useful and up-to-date information there! I will pull out what I need for the ALDI meeting and let you know if I have any queries.”

“Good news – we have provisionally had confirmation that Scottish Blend and Decaf will be listed in Morrisons in their July range event. New line forms submitted this week, so we should hopefully get full confirmation in the coming weeks on distribution levels, etc. Tesco have confirmed they want to list Scottish Blend 40s in their November event in both Main Estate and Express, and we are going to be presenting Decaf to the GB buyer to see if this can get listed outside of Scotland (given the growth in Scotland and NI).”

“You are an absolute star. We are getting ready to launch this new range, and I’m about to speak to the big supermarkets, and this backs up the data I’ve already worked on myself and reflects the products I have in mind!”

“All of this Kantar information is incredible. The detail is remarkable, and we will begin to digest and draw things from this to help us mould the NPD brief around our brand.”

“The FDCI Team were very helpful and sent some great insights across, which was much appreciated. It was regarding NPD and potential collaboration in terms of manufacturing with our ready meals, which could be very exciting for us moving forward, and the insights were great to back that up.”

“The Who Buys my Food portal has been great. It has given us some good insights already. We have some new products coming on board in a few months, so the insights we will get will be great, so we can quickly understand the purchasing behaviour of the new range!”

“Just wanted to thank you for pulling all the insight together last week. We had a positive customer meeting as a result of your effort.”

“I had a great time at the Invest NI consumer insights conference at Loughry a few weeks back! I was sitting at a table with a representative from Mintel, who kindly offered a meeting with us to point us towards the Mintel reports we should be requesting from you. We are beginning NPD for next year and are looking to move into crisps, so we would really appreciate any data surrounding crisps, specifically if you can think of anything that would be particularly useful.”

“I’m really glad I signed up – it’s been both thought-provoking and very practical.”

“We are always looking for ways to innovate, especially when it comes to reducing waste and making the most of leftover fruit from our production processes. However, successful innovation needs to be driven by consumer demand, and this is where Invest NI’s consumer insights service has been invaluable.”

Through Invest NI, we gained access to powerful tools like Mintel, Kantar, and VYPR. These platforms have provided us with essential data on market trends, consumer preferences, and purchasing behaviours. Mintel allowed us to explore the growing demand for sustainable and healthy products, while Kantar offered insights into different consumer demographics, helping us align our new product development with current market needs.

One of the most valuable tools has been VYPR, which we used to understand how best to communicate the use of waste in our products, while still maintaining a premium image. This has been key to ensuring that our sustainability message resonates with consumers in a way that supports the product’s positioning. We also plan to use VYPR to test our packaging and product concepts, ensuring we are on the right track before bringing anything to market.

Thanks to the support from Invest NI, we are now confidently moving forward with new products, such as fruit-based beverages made from our processing by-products. Their consumer insights have ensured that these products are not only sustainable but also commercially viable, helping us turn challenges into opportunities for growth and innovation.”

Appendix XII - Stakeholders Consulted

As part of the primary research, the Evaluation Team undertook consultations with 32 stakeholders, including:

Role	Consultee
Invest NI	
Food & Drink Division Director	Grainne Moody
Board Member	Dominic Darby
Business Information Services	Joseph Lonsdale
	Derval Mooney
RBG – Head of Group Transformation and Regional Managers	Iain Joannides
	Ethna McNamee
	Susan O’Kane
Scaling Manager	Clare McLaughlan
FDCI Team	Thelma Fitzgerald
	Eddie Hamill
	Eimear Dekoninck
F&D Division	Alastair Higgins
	Amanda Gamble
	Chris Bannon
	Claire Largey
	Drew McIvor
	Fiona Walker
	Jeffrey Graham
	Jennifer Guiney
	Joe Boyle
	Julie McCann
	Michelle Charrington
	Rosemary Wade
	Ross Kane
External	
CAFRE	Peter Simpson
NWRC	Stella Graham
Food Standards Agency	Katie McFarland
Tourism NI	Gary Quate
Ulster University	Lynsey Hollywood
Food2Market Ltd	Andy Maclachlan
TRKR Ltd	Mark Thomson
TRKR Ltd	Carey McEvoy

Appendix XIII - Participants’ Views, & Satisfaction With, the FDCI Service

Introduction

Following the collation of the participation information, the Evaluation Team identified that 304 unique businesses were supported through the FDCI Service between April 2019 and March 2025. Several businesses were identified as having ceased trading, reducing the number of possible contacts to 289. Of these, 83 businesses (29%) participated in the consultation exercise.

Table 1: Summary of Participants in the Consultation Exercise

No. of unique businesses supported	304
No. of individuals for whom contact details were provided (excluding known businesses that had ceased trading)	289
Total no. of surveys completed	83
Response rate	29%
Confidence interval level	+/-8.91%

Profile of Respondents by Support Received

Whilst most respondents (82%, N=83) were able to identify the support received from one or more of the strands of the FDCI Service, a minority (18%, N=83) advised that they did not recall receiving support from the FDCI Service.

Table 2: Support Received⁶⁸

Strand	%
A Market Information Request where a FDCI Team member responded to a request for information/support made by your business and provided market intelligence information to support your business in areas such as sales or new product development activities.	57%
You attended an event, workshop or seminar organised by the FDCI Team where market intelligence data relevant to your business was presented and discussed.	46%
A visit to the FDCI’s Market Intelligence Centre at Invest NI’s headquarters in Belfast to receive advice and guidance using market/consumer intelligence to support your business in areas such as sales or new product development activities.	29%
You made use of information held on the FDCI Service’s Insights Hub . This is an online web portal (housed on the Invest NI corporate website) that businesses can use to access information on market trends and consumer intelligence featured in reports, presentations, recordings of events, etc.	29%
Market intelligence information to support your attendance at a trade or consumer exhibition	23%
A Market Intelligence Clinic where you met (in person at a location away from Invest NI’s headquarters in Belfast) a member of the FDCI Team to receive advice and guidance using market/consumer intelligence to support your business in areas such as sales or new product development activities.	20%
You were a participant in the Supplier Development Programme . This programme supports businesses to develop their sales with Tesco using dunhumby data drawn from Tesco Clubcard.	16%
You were a participant in the Growth through Insights Programme . This supports businesses to test new product development concepts using data, insight and market research.	6%
A Data Purchase Grant (DPG) , where your business received grant support to purchase specific market intelligence data that Invest NI did not already hold.	5%
You cannot recall receiving support from the FDCI Service	18%

Those respondents who indicated that they did not recall receiving support were routed to end the survey; the rest of the analysis is based on 68 respondents.

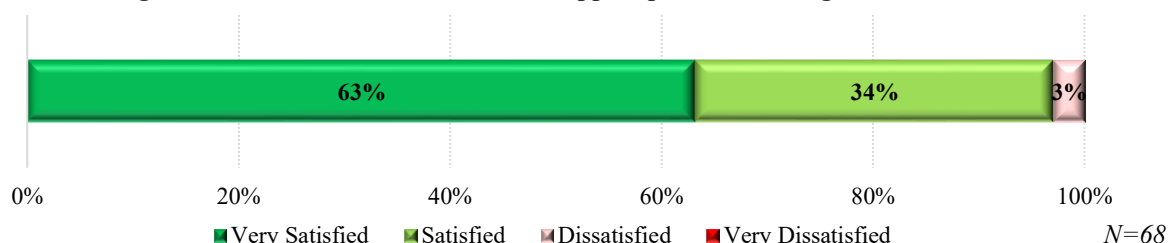
⁶⁸ Responses do not sum to 100%, as respondents could select more than one strand of activity.

Satisfaction with Support provided through the Service

Overall Satisfaction

On an overall basis, almost all (97%, N=68) respondents were either satisfied (34%) or very satisfied (63%) with the support received through the FDCI Service.

Figure 1: Overall satisfaction with the support provided through the FDCI Service



As reflected in the comments below, those respondents who were satisfied with the support received generally spoke about:

- The FDCI Team as being helpful, pleasant to work with, knowledgeable and highly responsive.
- Their appreciation for receiving up-to-date market insights.
- How the data insights were critical to their business’ growth and development.

“The FDCI Team are always helpful and provides relevant information.”

“Each member of the FDCI Team is pleasant to work with and efficient in responding with useful information and guidance.”

“Whilst I was satisfied with the support received, I would like access to more data sources and fewer restrictions on the quantity of information.”

“The Service is great. It allowed me to gain a thorough understanding of what consumers are seeking within my target category.”

“The team is brilliant and very responsive to requests. The access we get to sector and product data is unrivalled and really helps us to compete at a UK level.”

“The information was very insightful. I will use the service again.”

“The support we received was fantastic, and in addition, they offered for us to visit the Belfast office for further assistance, if and when required.”

“It is a fantastic service, where you can receive up-to-date, relevant data on a “same-day service” basis. There is also advice available if you are unsure of what information to source to address a particular query. I received first-class responsiveness and would recommend the service to all food and drink businesses.”

“The FDCI team are supportive, knowledgeable, and professional. This resource is invaluable to the NI economy. The team are always on hand to offer support and is very efficient in their communications.”

“The FDCI Team are always available to help with research queries and category information. The events are a great addition to help grow our business. The information provided by the FDCI service has supported our business to grow our existing customer listings and gain new customer sales.”

“It is a critical service that has helped my business to grow and develop. The data and insights provided have been key to our growth.”

“The FDCI Team are an excellent part of the Invest NI offering. The help I received was outstanding.”

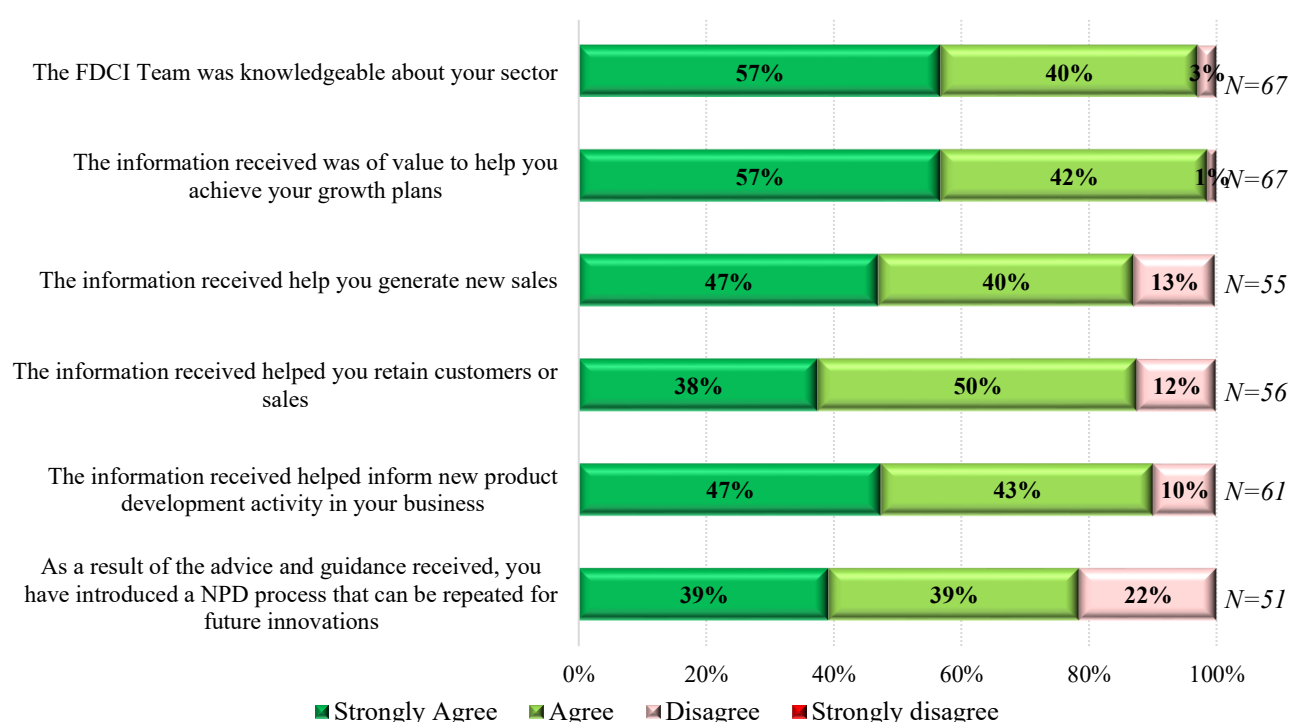
“The FDCI Team has excellent knowledge, and their advice is proving essential in our business. I tend to reach out before developing strategies.”

Satisfaction with the Support Received

Respondents also reported high levels of satisfaction with individual aspects of the FDCI Service, with most (78%+) respondents (where relevant) in agreement that:

- The FDCI Team was **knowledgeable** about their (the business’) sector, with almost all (97%, N=67) respondents in agreement – 57% ‘strongly agreed’ and 40% ‘agreed’.
- The information received was of value to help them **achieve their growth plans** (99%, N=67).
- The information received helped them generate **new sales** (87%, N=55).
- The information received helped them **retain customers** or sales (88%, N=56).
- The information received helped **inform new product development activity** in their business (90%, N=61).
- As a result of the advice and guidance received, they have **introduced an NPD (new product development) process** that can be repeated for future innovations (78%, N=51).

Figure 2: Satisfaction with the Support Received⁶⁹



As reflected in the comments below, key points raised by respondents included:

- Many respondents described the FDCI Team as knowledgeable, helpful, responsive, and willing to “go above and beyond”, including guiding businesses through the data purchase grant process and proactively sharing relevant data.
- Several respondents noted that the information received was useful, timely, digestible, and of significant benefit in helping their business understand consumer trends, category performance, pricing/format/USP opportunities, and overall market dynamics.
- Several respondents highlighted that the data helped to make them more confident in their decision-making, facilitated positive internal and external conversations (with retailers, distributors, customers), and strengthened their credibility when entering or exploring new markets.
- Businesses used the service to assess market potential, prioritise where to compete (and where not), and inform export decisions. It was highlighted that this was especially valuable for small firms that could not otherwise afford high-cost datasets.

⁶⁹ The response rate varies as some respondents suggested that certain elements of the question were not applicable to them.

In a minority of cases, respondents noted that the market intelligence they desired was not available or that the information was not sufficiently up to date to support their decision-making.

“Unfortunately, the market intelligence information that I was after was not available through the consumer insights service, as it was contained in American catalogues costing thousands of pounds to access.”

“With the information received, we were able to produce reliable market information, which helped guide positive conversations with current and potential customers.”

“The data we received was all very useful, but we have not been able to translate that into business sales. It is a work in progress.”

“The Team is always very willing to help with any request we have and to guide us through the process of applying for a data purchase grant. They have also sent relevant data that they know would be relevant to our sector and business. We also find the consumer insights conference to be a great, insightful event each year.”

“The information received via the FDCI Team directly and at the annual conference has been of significant benefit to our business. It has helped to enhance our level of engagement with retailers, better understand key consumer trends and inform our product development process.”

“The FDCI Team were incredibly helpful, supplying useful and timely information for the needs of our business. We have been able to use this support to inform our export decisions.”

“The information we received through the service has supported internal conversations, which have aided conversations with customers.”

“We received the necessary information on market potential to proceed with NPD.”

“The information attained mainly helped me to understand the state of the market, how the category was performing in different geographical regions, where the growth opportunities were in terms of product offering (including price, weight, flavours, textures, key USPs).”

“The project for us was testing out a concept that we were trying to ascertain the value of launching, but also to understand the market. The support was hugely beneficial for us and informed us in other areas of growth, such as pastry. We are not yet at the point of a customer-ready concept or launch.”

“The information we received through the FDCI Service has been invaluable. As a small business, it has enabled us to build data-based models by market to assess where to attack and, equally, where not, thereby preserving and maximising scarce resources. We could not afford to do this otherwise, and the depth and quality of the service is FTSE 100 standard.”

“I had no access to specific categories through my data access, but Invest NI was able to provide some access to those specific categories.”

“The FDCI Team were great in understanding our requirements and came back promptly with more information than expected. The service is excellent, and the team goes above and beyond.”

“We found that there was not a lot of up-to-date information available about our products.”

“The information provided was set out in a format that made it digestible. We were able to navigate the details to make informed decisions about our products as well as the overall brand.”

“Whilst our product was already developed, based on the information received, we made alterations to the packaging design.”

“The service supported us in our development of new lines for sale for the Scottish market.”

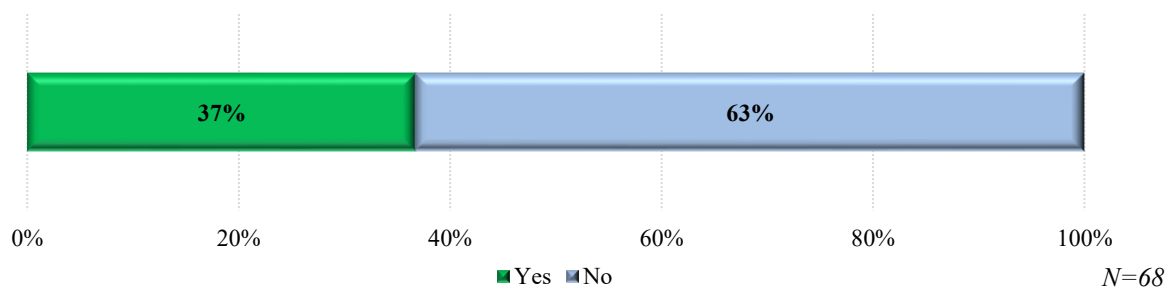
“The staff in the FDCI Team are extremely knowledgeable and helpful. The resources have the potential to be overwhelming when first used. However, the fact that the staff are on hand to help guide and assist with your enquiry is invaluable. Coupled with the high costs associated with purchasing these datasets, without the support offered by Invest NI, we would not be in a financial position to be able to avail of this information independently.”

“The data and trends information provided by the FDCI Team were essential for us in opening new markets with potential distributors. The data showed that we knew the market, and we were then confident that our products would be of interest.”

Satisfaction with other Support Received (above and beyond the FDCI Service support)

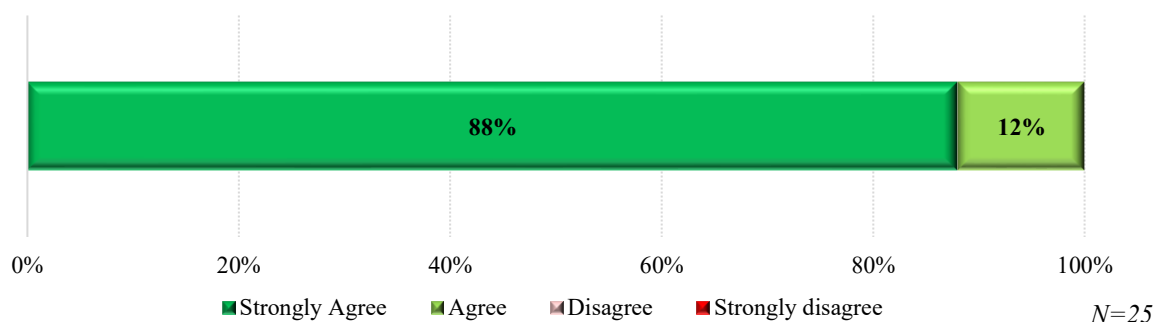
More than a third (37%, N=68) of respondents indicated that they had received follow-on support/advice/engagement from Invest NI (above and beyond the FDCI Service support). This support included SFA support, R&D grants, Trade Advisory Service (TAS) support and introductions to Invest NI’s in-market teams.

Figure 3: Receipt of other Support from Invest NI



All (100%, N=25) of the respondents who received follow-on support/advice/engagement from Invest NI (above and beyond the FDCI Service support) suggested that they have been satisfied with the support and/or advice received.

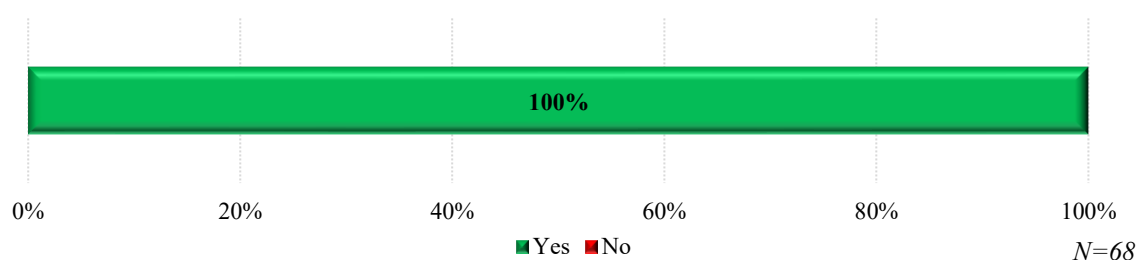
Figure 4: Satisfaction with Other Support Received



Participants’ Willingness to Recommend the FDCI Service to Other Businesses

Encouragingly, all (100%, N=68) of the respondents indicated that they would recommend the FDCI Service to other businesses to assist them in pursuing market opportunities or introducing new products.

Figure 5: Would the business recommend the FDCI Service to other businesses to assist them in pursuing market opportunities or introduce new products?



“We would definitely recommend the FDCI Service to others, as the team is always helpful and supportive and can provide real insight into key market sectors that small businesses may not be able to afford.”

“The FDCI Service is essential for SMEs. Businesses can access data they can't afford and receive help with interpreting the data.”

“Any new entrepreneurs should explore the market first, and this is the best place to start.”

“Using the information available through FDCI or attending one of their events would be very beneficial to any food & drink business seeking to find out more about a new market or when considering the development of a new product.”

“The FDCI Service provides essential data to make objective decisions. It can also help with strategy, ingredient choice and packaging design, not to mention building a strong reason to buy into your brand when pitching to retailers.”

“The Service is very efficient and comprehensive.”

“I have recommended the service. I know from experience that many businesses do not know this service is available.”

“As someone who has never started a business and knows nothing about the drinks sector, it made me feel confident enough to apply for the innovation voucher as the data provided validated the product idea.”

“As someone in the early stages of my business, this was a very helpful service to provide non-judgemental data and information in a field I had no prior knowledge of. They also encouraged my idea based on the market research.”

“I would 100% recommend, as market intelligence is critical if you want to succeed in difficult times.”

Participants’ Recommendations for Improvements

Participants’ recommendations for how the support offered through the FDCI Service could be improved typically related to:

- Broadening data access, particularly related to retailer intelligence (e.g. dunnhumby and other retailer data).
- Enhancing the ability to undertake self-serve research and the insights hub usability.
- Increasing awareness of the service.
- Expanding the programme of events and webinars.
- Creation of a regular ‘newsletter’ highlighting new insights, datasets and key reports.

“My experience and support received has been fantastic, without it I would not have progressed my idea or started my business.”

“This service might be good for standard food & drink services, but lacks support in areas of innovation, anything ‘outside the box’. However, I appreciate the time the team took to try to help me.

“The Team is excellent and provides access to unbelievable data that helps us to stay ahead of the game.”

“The consumer insights service is really valuable, especially for smaller businesses that cannot afford to pay for the likes of Mintel and Dunnhumby.”

“There needs to be more events and interaction, as well as an easier way to self-serve researching markets. However, I do understand that the data providers have limitations, but it can be difficult to know what is relevant.”

“Retailer data is the most valuable data. Access to the Beet platform is invaluable. It would be great to have access to other retailers’ data, even at a Northern Ireland level. It would also be useful to see some more of the newer trend reports coming through, as the likes of Mintel etc. release data too late these days to react to.”⁷⁰

⁷⁰ Beet by Ocado is a self-serve platform that allows Ocado suppliers and buyers to view their sales data, promotions, customer behaviour insights and more. The platform helps suppliers to collaborate smarter with Ocado buyers as it allows both parties to view the same data and make impactful decisions together.

“Overall, I think it is a great service, but there was a lot of repetition of content on the GTI (Growth Through Insights) programme. It needs to be a more balanced structure that aims to deliver a final and overall proposition. As the content was so focused on consumer data, I felt there were elements not explored fully, and the final presentation was not clear in terms of format and expectations. This actually led to a negative experience for staff members who were presenting for the first time. Whilst feedback and creating real-life scenarios are useful, there is a context and place for it, which I do not believe was in that room.”

“It needs to be promoted more that this service is available.”

“It would be good to see regular, perhaps quarterly, workshops with FDCI experts highlighting new data insights and reports available. I also think that Invest NI should be more proactive in their approach, by telling us what they have and even contacting certain businesses directly, informing them of what is available. The Service needs to be more visible; send out monthly newsletters like Nielsen or Shopper Intelligence.

“I have so many data providers that Invest NI are the last one I would think of using. I tried the insights portal, but after 5 attempts of resetting my passwords and after contacting Invest NI, I gave up.”

“I would recommend the insight days, super informative and the chance to connect with industry experts and peers”.

“The pathway we have taken to connect with the service has been the most important part of the journey. The institutions which we have connected with still play a key role in our development as a brand.”

“There needs to be more promotion of the service and targeting of early-stage businesses. For example, have the Go Succeed programme inform food and drink businesses of the service.”

“It would be useful if there were more webinars and events.”

“This is a great service; it just needs to be advertised more to Invest NI Clients. Please keep it.”

“This service has been very beneficial for our company. Every year, we access the market reports that we need, which contribute to our product development and marketing activities.”

“The FDCI Service is an invaluable resource to the NI Food & Drinks industry!”

“Access to this type of service has been invaluable to our company. The team at Invest NI have been highly professional, providing insightful guidance that enabled the successful launch of our new products.”

“I have found the insights team very helpful, and I feel the service offers a great opportunity to gain insights into new markets and consumer trends which would not be possible for a small business unless the service was available.”

“The Service provides great support from the team who try to do what they can to help all business increase their potential to grow.”

“The consumer insights team is a valuable service for the NI Food & Drink industry. It is our “go to” for accessing consumer insights and market data. The team are always very helpful and willing to provide us with the most relevant information possible, which our business has used over many projects in the last number of years. Without this, our impact in the domestic Northern Ireland market and in GB and Ireland would have been much reduced.”

“It would be great to get access to Dunnhumby and Kantar data.”

“It has been an excellent service, and the team have played a huge part in our continued success and growth, which would almost certainly not have happened without them.”

Appendix XIV - Impact of the Service on Participant Businesses

This section considers the impact (both monetary and non-monetary) that receiving support through the FDCI Service has had on participants.

Stage of Business Development before Receiving Support from the FDCI Service, and now

At the time of receiving support through the FDCI Service for the first time, almost all (93%, N=68) of the respondents were trading, either solely in Northern Ireland (27%) or in markets outside NI (66%). Very few (7%) respondents had not yet started trading.

At the time of consultation (January/February 2026), almost all (93%, N=68) of the respondents were trading, with 83% trading in markets outside NI. One business indicated that they had ceased trading.

Table 1: Stage of business development before receiving support from the FDCI Service, and now (N=68)

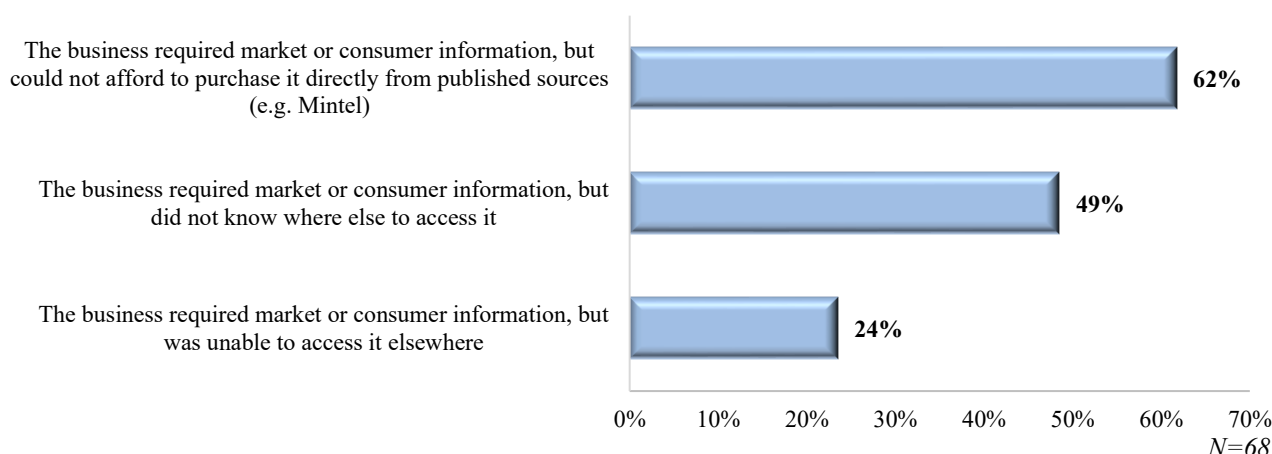
	Before	Now
It had/has not yet started trading	7%	6%
Trading in the NI market only	27%	10%
Trading in markets outside Northern Ireland	66%	83%
The business has ceased trading.	-	1%
Total	100%	100%

Role of the FDCI Service Support

Respondents indicated that the following factors led them to seek FDCI support:

- The business required market or consumer information but **could not afford** to purchase it directly from published sources (e.g. Mintel) (62%, N=68).
- The business required market or consumer information but **did not know where else to access it** (49%, N=68).
- The business required market or consumer information, but was **unable to access it elsewhere** (24%, N=68).

Figure 1: Reasons for seeking or receiving FDCI support



The key purposes that respondents required the market/consumer intelligence for included:

- They needed **information on a specific product** category (76%, N=68).
- They needed information to **inform new product development** activity (68%, N=68).
- They needed **information to inform discussions** with a potential new customer (60%, N=68) or an existing customer (53%, N=68).
- They needed information to **inform new sales activity** (51%, N=68).

Table 2: Key requirements for market intelligence

Purpose	%
Information on a specific product category	76%
Information to inform new product development activity	68%
Information to inform discussions with a potential new customer	60%
Information to inform discussions with an existing customer	53%
Information to inform new sales activity	51%
Information on a specific existing geographic market	44%
They generally wanted to keep up to date on the market, but didn't have a specific purpose for the information	40%
Information on a specific new geographic market	34%
Information on competitors/competitor activity	34%
Information to inform branding activity	26%
Information on a specific demographic (e.g. age, lifestyle, etc.)	24%
Information to inform consumer communications activity	24%
Information on a specific retailer	21%
They were thinking about starting (or were at an early stage of starting) a food or drink business and needed information on the market or consumers to inform their product development or sales activities	10%

FDCI Service Activity Additionality

The net impact of the FDCI Service (i.e. its additionality) relating to an individual's decision to engage in similar activities to pursue sales growth or new product development opportunities can only be measured after making allowances for what would have happened in the absence of the support from the FDCI Service. That is, the support must allow for deadweight. 'Deadweight' refers to the activity that would have occurred without the intervention, i.e. the FDCI Service.

Appendix XV provides a detailed overview of the Evaluation Team's deadweight/additionality calculations. However, in summary, we have calculated levels of activity deadweight using a 'participant self-assessment' methodology. The methodology utilises a series of questions⁷¹ within the participant survey and assigns weightings (agreed upon in conjunction with the DfE Economist Team) to the individual responses.

The questions sought to ascertain respondents' views on the impact that the receipt of the FDCI Service support had on their decision to engage in activities to pursue sales growth or new product development opportunities. Options related to whether the activities:

- Definitely would not have been undertaken.
- Probably would not have been undertaken.
- Would have been undertaken, but at a smaller scale.
- Would have been undertaken, but at a later date.
- Would have been undertaken, but at a smaller scale and a later date.
- Probably would have been undertaken; and
- Definitely would have been undertaken regardless of the FDCI Service.

Depending on the response provided, a level of additionality/deadweight was applied. For example, a respondent who indicated that they definitely would not have engaged in activities to pursue sales growth or new product development opportunities in the absence of the FDCI Service would have been assigned a level of 100% additionality (i.e. full additionality). Conversely, a respondent who indicated that they definitely would have undertaken the activities in the same manner and timescale regardless of their participation in the FDCI Service would have been assigned a level of 100% deadweight (i.e. no additionality). Other responses were given a weighting somewhere between these two extremes (i.e. a level of partial additionality).

⁷¹ In-line with DfE guidance, these questions focused on identifying the likelihood that the individual would have undertaken the research activities, what scale of activities would have been undertaken in the absence of support (if relevant) and how much later the activities would have been undertaken (if relevant).

The outcomes of the analysis are provided below:

Table 3: Activity Additionality/deadweight (N=68)	
Additionality	Deadweight
58%	42%

However, it should be noted that most (85%, N=68) respondents indicated that the FDCI Service played some role in their decision to undertake activities to pursue growth opportunities outside NI, i.e. there was at least partial additionality associated with 85% of responses.

"I am new to running a business and had no prior knowledge or skills in this field, so this service greatly supported me."

"Small business managers wear many caps; we prioritise, and so many items can be shelved. Support is required to get everything completed."

"As an SME, the cost of market information is very prohibitive, so we would have been unable to progress as much or as quickly without the support from Invest NI."

"I still would have required similar information, but my ability to gain that same information would have been limited."

"Being able to obtain market data gave us more confidence that there was a market for the NPD."

"If the FDCI service was not available, we would likely have tried to seek some market data and consumer trend reports, but our budget for this would have meant we accessed limited information, in comparison to what was available through the FDCI Service. The Annual FDCI conference day is very unique; without the availability of this event, we certainly would not have access to this sort of content and insight."

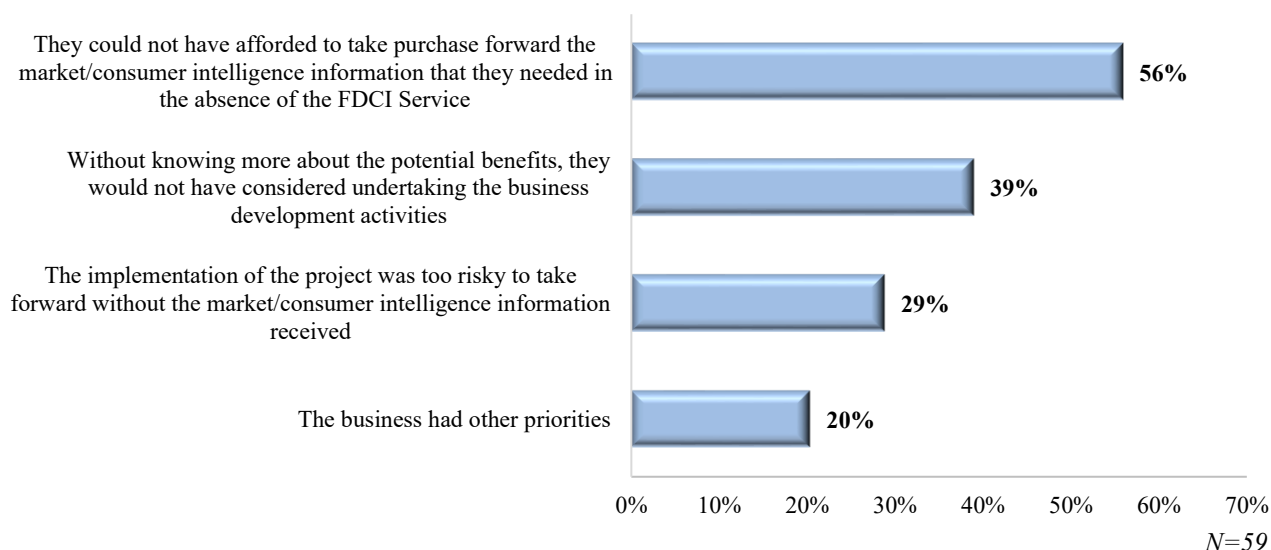
"The information from the FDCI Service informed and built intelligence, and without it, we would be less informed, but it did not necessarily drive the sales growth."

"The data we received led us to focus our efforts on an alternative country where our shareholder thought we should target as the primary opportunity. This decision has proved to be the correct one by far."

"We would have tried to gain the data, but likely at a slower pace with potential cost implications."

In terms of market failures, respondents indicated that the following factors had stopped them from engaging in activities to pursue sales growth or new product development opportunities:

- The business **could not afford** to take forward the market/consumer intelligence information that they needed in the absence of the FDCI Service (56%, N=59).
- Without **knowing more about the potential benefits**, the business would not have considered undertaking the business development activities (39%, N=59).
- The implementation of the project was **too risky** to take forward without the market/consumer intelligence information received (29%, N=59); and
- The business had other priorities (20%, N=59).

Figure 2: What stopped you from engaging in these activities?⁷²

FDCI Service Outputs

Outputs to date

As a result of the FDCI Service support, respondents reported that their business had (as of January/February 2026):

- Strengthened their relationship with an existing customer(s) (75%, N=68)
- Gained new customers (65%, N=68)
- Improved the way they approached new product development and the processes they used (62%, N=68)
- Achieved new or additional sales (62%, N=68).

Table 4: Outputs as of January/February 2026

Output	% of respondents
Strengthened relationships with existing customer(s)	75%
Gained new customers	65%
Improved the way they approached new product development and the processes they used	62%
Achieved new or additional sales	62%
Introduced a new product(s)	54%
Enhanced or changed an existing product(s), e.g. recipe reformulation	43%
Begun trading in a new geographic market	38%

FDCI Service Role in Supporting Businesses to Achieve Business Outcomes

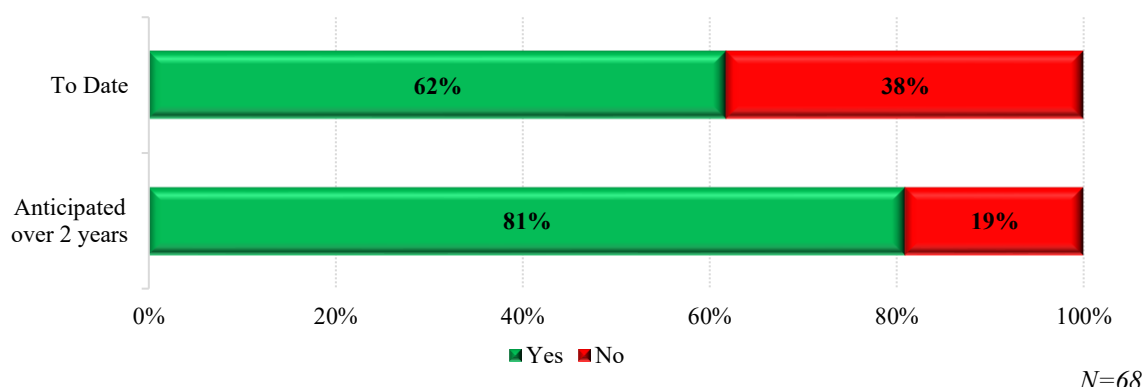
Gross Sales and GVA

More than three-fifths (62%, N=68) of businesses indicated that they had achieved sales growth (as of January/February) as a result of the support received through the FDCI Service.

In addition, most (81%, N=68) respondents indicated that they anticipate achieving additional sales as a result of the support received through the FDCI Service.

⁷² Responses do not sum to 100%, as respondents could select more than one response. This question was not asked to respondents that indicated that the activities would definitely or probably have happened anyway (N=9).

Figure 3: Achievement of Additional Sales as a result of the FDCI Service Support



Almost two-thirds (62%, N=42) of businesses that had achieved sales as of January/February 2026 were willing and able to provide details of the additional sales that they have achieved since receiving support from the FDCI Service. Across the 26 businesses, they suggested that their turnover had increased by a cumulative c. £5.7m.

Using the information reported by the survey respondents, the Evaluation Team's grossing-up analysis indicates that the FDCI Service has contributed (at least in part) to supporting businesses to derive gross sales of c.£23.4m, 60% (or c. £14.1m) of which was derived in external markets, either in GB (30% or £7.1m) and/or export (30% or c£7m) markets. The application of the NI average sectoral level of GVA (i.e. 38.1%⁷³) suggests that these businesses have potentially contributed approximately c.£8.9m of gross GVA to the NI economy.

In addition, 55 respondents indicated that they anticipated achieving additional sales, 58% of which were willing and able to provide projections of the anticipated level of additional sales over 2 years, estimated at c.£21.2m. The Evaluation Team's grossing up analysis indicated that the FDCI Service support has the potential (at least in part) to support businesses to derive additional gross sales of £72.6m over 2 years.

Table 5: Gross Sales and GVA – Actual and Anticipated over 2 years

Survey Sample	Actual	Anticipated over 2 years
No. of sample businesses ⁷⁴	83	83
No reporting increased sales (actual or anticipated)	42 (51%)	55 (66%)
No. able or willing to quantify actual or projected sales	26 (62%)	32 (58%)
No. of outliers	1	3
Range (sales)	£5k-£2m	£13k-£4.1m
Mean (excluding outliers)	£147,760	£321,483
Median (excluding outliers)	£89,000	£145,000
Total (excluding outliers)	£3,694,000	£9,323,000
Total Gross Impact for Sample (including outliers)	£5,694,000	£21,173,000
Population		
Total no. of participant businesses (trading)	289	289
Total Gross Impact for Population (excluding outliers)	£21,425,200	£60,760,241
Total Gross Impact for Population (including outliers)	£23,425,200	£72,610,241
GVA	38.1%	38.1%
Gross GVA	£8,925,001	£27,664,502

⁷³ Source: NI Annual Business Inquiry - NI Non-Financial Business Economy 2023 Provisional Reporting Unit Results (December 2024)

⁷⁴ NB: 18% of the sample (15 respondents) did not recall receiving support.

Table 6: Value of Additional Sales derived and/or anticipated by location (Gross)						
	Actual Sales			Anticipated Sales		
	%	Sample	Population	%	Sample	Population
NI Sales	40%	£2,263,000	£9,310,015	23%	£4,950,000	£16,975,426
GB Sales	30%	£1,737,500	£7,148,101	50%	£10,445,000	£35,819,864
Export Sales	30%	£1,693,500	£6,967,084	27%	£5,778,000	£19,814,952
Total Sales	100%	£5,694,000	£23,425,200	100%	£21,173,000	£72,610,241
Total External Sales (outside NI)	60%	£3,431,000	£14,115,185	77%	£16,223,000	£55,634,815

Employment

A minority (13%, N=68) of respondent businesses indicated that they had achieved employment growth as a result of the support received through the FDCI Service. Only 3 of these businesses were willing and able to quantify the impact of the support on their employment levels and suggested that they had increased employment by 5 FTEs. Grossing this up to the unique number of participant businesses (N=289) suggests that the FDCI Service has helped to create 52 FTE jobs.

Table 7: Gross Employment Creation	
Survey Sample	Jobs Created
No. of participant businesses	83
No. reporting impact	9 (11%)
No. able or willing to quantify	3 (33%)
No. of outliers	0
Range (jobs)	1-3 FTE jobs
Mean (excluding outlier)	1.67
Total (excluding outlier)	5
Total Gross Impact for Sample (including outlier)	5
Population	
Estimated Total no. of participant businesses (trading)	289
Total Gross Impact for Population (excluding outlier)	52 FTE jobs
Total Gross Impact for Population (including outlier)	52 FTE jobs

Other Impacts

In addition, respondents reported several other impacts as a result of the receipt of the FDCI Service support, including:

- Increased competitiveness (54%, N=68)
- Improved the skills of their workforce (29%, N=68)
- Increased productivity/efficiency (26%, N=68).

Table 8: Achievement of Other Impacts (N=68)		
Impact	% of respondents	Quantification where relevant
Increased competitiveness	54%	N/A
Improved the skills of your workforce	29%	N/A
Increased productivity/efficiency	26%	N/A
Impacted on your business's survival	22%	N/A
Increased expenditure on NPD	19%	£15,000 ⁷⁵
Reduction in costs	18%	£15,000 ⁷⁶
Employment Safeguarded/Retained	15%	Not known ⁷⁷
Increased employment (FTEs) within your business	13%	5 FTE jobs ⁷⁸

⁷⁵ Only 2 of 13 respondents were willing to quantify.

⁷⁶ Only 1 of 12 respondents was willing to quantify.

⁷⁷ No respondents were willing to quantify.

⁷⁸ Only 3 of 9 respondents were willing to quantify.

The key points raised by respondents concerning the achievement of impacts were as follows:

- Market intelligence was **shaping strategy and decisions** - Respondents described market intelligence as actively guiding business direction, reshaping strategic priorities, and improving confidence in decision-making.
- Clear **influence on NPD** and product choices (including avoiding costly mistakes) – Several respondents cited impacts on new product development: flavour selection, category confidence (e.g., frozen), recipe formulation, packaging/communications, and embedding consumer/market data into the NPD process. Several explicitly stated that the insight helped them avoid pursuing the wrong concept/flavours, preventing costly errors and enabling ‘fail fast’ thinking.
- **Better customer/retailer engagement** and stronger negotiation position - Respondents reported that the data strengthened discussions with retailers and distributors (e.g., pricing/margin conversations), supported preparation for range meetings, and helped negotiation on listings. It also helped build credibility with customers.
- **Route-to-market and market entry impacts** – Respondents highlighted impacts including identifying new routes to market, developing market entry strategies, and sharpening positioning using competitor and target customer insight.
- Support for **expansion of exporting** – Several respondents considered that the insights supported expansion or sales into various new geographies (including ROI, Germany and UAE).

Net Additional Monetary Impacts

The net impact of the FDCI Service (i.e. its additionality) on recipient businesses’ impacts (incl. sales and employment) can only be measured after making allowances for what would have happened in the absence of the service. That is, the impact must allow for deadweight. ‘Deadweight’ refers to outcomes that would have occurred without their support.

The analysis of individual survey responses and application of the same ‘participant self-assessment’ methodology used to assess ‘activity additionality’, results in the following levels of ‘impact deadweight and additionality’⁷⁹:

Table 9: Impact Additionality/deadweight (N=68)	
Additionality	Deadweight
61%	39%

However, it should be noted that most (85%, N=68) of respondents indicated that the FDCI Service played some role (i.e. partial additionality) in their ability to achieve the impacts reported.

Displacement

The Evaluation Team has also considered the potential displacement that might be created by the impact of FDCI Service support. To assess this, we have again utilised a series of questions⁸⁰; the answers to which are assigned a ‘displacement factor’ in both the NI market and the broader UK market. We have calculated displacement based on two factors:

1. The proportions of the businesses that participants compete with that are based in NI/GB, keeping in mind the markets in which their company sells; and
2. Whether, in the participants’ area of business, market conditions have improved over the period since receiving support.

On an overall level, the Evaluation Team’s analysis suggests that the displacement factor at the NI level is 27%, whilst at the GB level, it is 19%.

⁷⁹ See Appendix XV for further details.

⁸⁰ Developed in conjunction with DfE’s Economists.

Summary of Net Additional Monetary Impacts

The removal of the calculated levels of impact deadweight (39%, N=68) and NI-based displacement (27%, N=68) to the gross monetary impacts potentially achieved by the total participant businesses suggests that (up to Jan/Feb 2026) the FDCI Service may have directly:

- Contributed in the region of c.£4m in net additional GVA to the NI Economy to date, with an additional net additional GVA of £12.3m anticipated over the next two years.
- Created approximately 23 net additional FTE jobs.

Table 10: Net additional monetary impacts			
	Actual GVA	Anticipated GVA (over 2 years)	Employment (FTEs)
Gross	£8,925,001	£27,664,502	52
Less Deadweight (@ 39%)	£3,480,750	£10,789,156	20
Sub-total	£5,444,251	£16,875,346	32
Less Displacement (@ 27%)	£1,469,948	£4,556,343	9
Net additional	£3,974,303	£12,319,003	23 FTE Jobs

Return on Investment

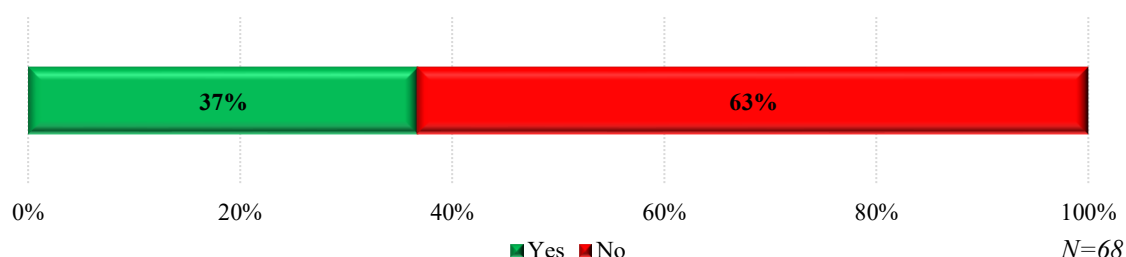
Based on the Evaluation Team's estimate of the Service's full economic cost⁸¹, the minimum return on investment delivered by the FDCI Service over the period April 2019 to March 2025 would be £1.05. However, if the anticipated benefits are achieved, the return on investment could increase to £4.32.

Table 11: Estimated Return on Investment			
	Net Additional GVA	Full Economic Cost	Return on Investment
Actual	£3,974,303	£3,771,720	£1.05
Actual + Anticipated	£16,293,306		£4.32

Unexpected Impacts/Benefits

A significant minority (37%, N=68) of respondents indicated that the receipt of the FDCI Service support had led to other benefits or unexpected impacts/benefits for them or their business.

Figure 4: Other unexpected impacts/benefits



The types of unexpected impacts/benefits identified were as follows:

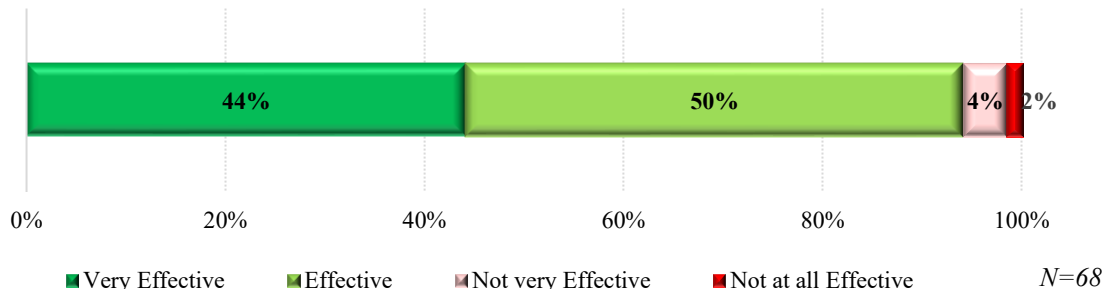
- Improved **confidence** in new product development and/or the business and/or the marketplace (N=6)
- Supported the development of a **wider business strategy** (N=3).

⁸¹ Inclusive of delivery costs, costs associated with BIC procured data platforms and staff costs.

Effectiveness of the FDCI Service in supporting business

Almost all (94%, N=68) of the respondents considered that the support received through the FDCI Service in terms of supporting the business to pursue market opportunities or introduce new products was either ‘effective’ (50%) or ‘very effective’ (44%).

Figure 5: Effectiveness of the FDCI Service in supporting business



“The support was effective as it supported our market strategy.”

“The support from the FDCI Team is very effective; it is a bonus that it is easily accessed and at no cost.”

“It was very effective for us and helped us to inform new flavours in a new product format.”

“The service confirmed our new product development was worth proceeding with.”

“The support allowed the business to get a clearer picture of our own business and gain insights into the workings of others.”

“The love of producing a great product can only take one so far - the knowledge of how to execute, where and to whom is essential.”

“The support was very effective in supporting us to pursue market opportunities. We cannot speak highly enough of the FDCI team. They are an invaluable resource to the NI Foods & Drinks industry.”

“Some market intelligence work was carried out, and the information received, although useful, did not change our business direction.”

“The Service is fantastic. It allowed us to target our resources in regions and areas where we were confident of developing sales and revenue, not wasting limited resources.”