

LMC

Mystery Shops: May 2019

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## Methodology and Sample

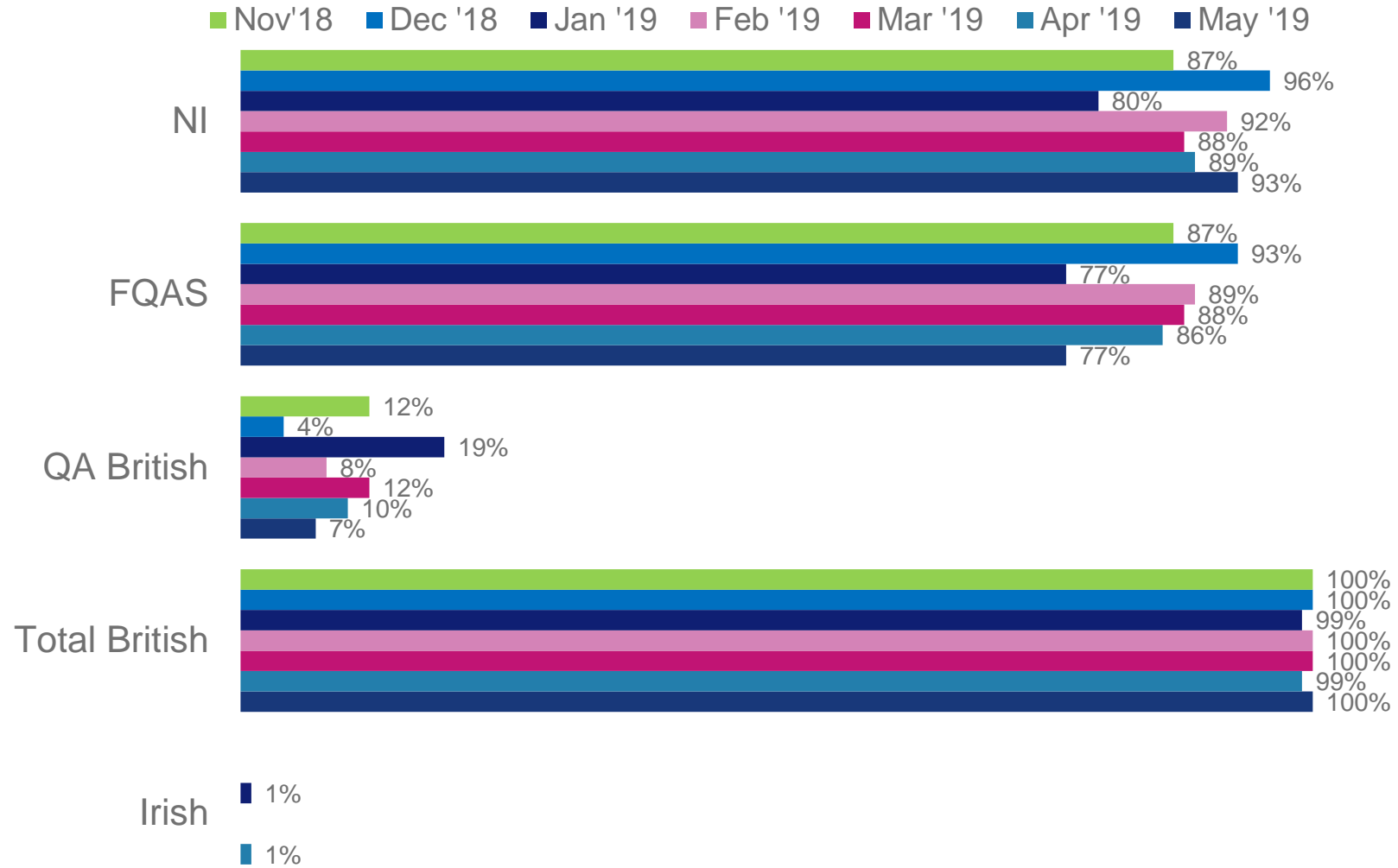
- The primary objective of this on-going study is to understand the origin of relevant beef and lamb products stocked across a variety of stores in Northern Ireland.
- On a monthly basis, a Cognisense Ltd. mystery shopper visits 10 separate stores in order to record the following information:
  - Presence of the Northern Ireland Farm Quality Assured label or other (specified by LMC) quality assurance logos
  - Origin of product (NI, Britain, Ireland, EU, Australia or New Zealand)
- Each store is visited twice per month, allowing for a weekday and weekend mystery shop.
- The stores visited within the sample are Tesco, Sainsbury's, ASDA, Lidl, SuperValu, Marks & Spencer, Eurospar, Co-Op and Iceland – the location of the stores visited changes each month.
- All fieldwork is conducted in accordance with the Market Research Society Code of Conduct.
- This report details results from November 2018 – May 2019

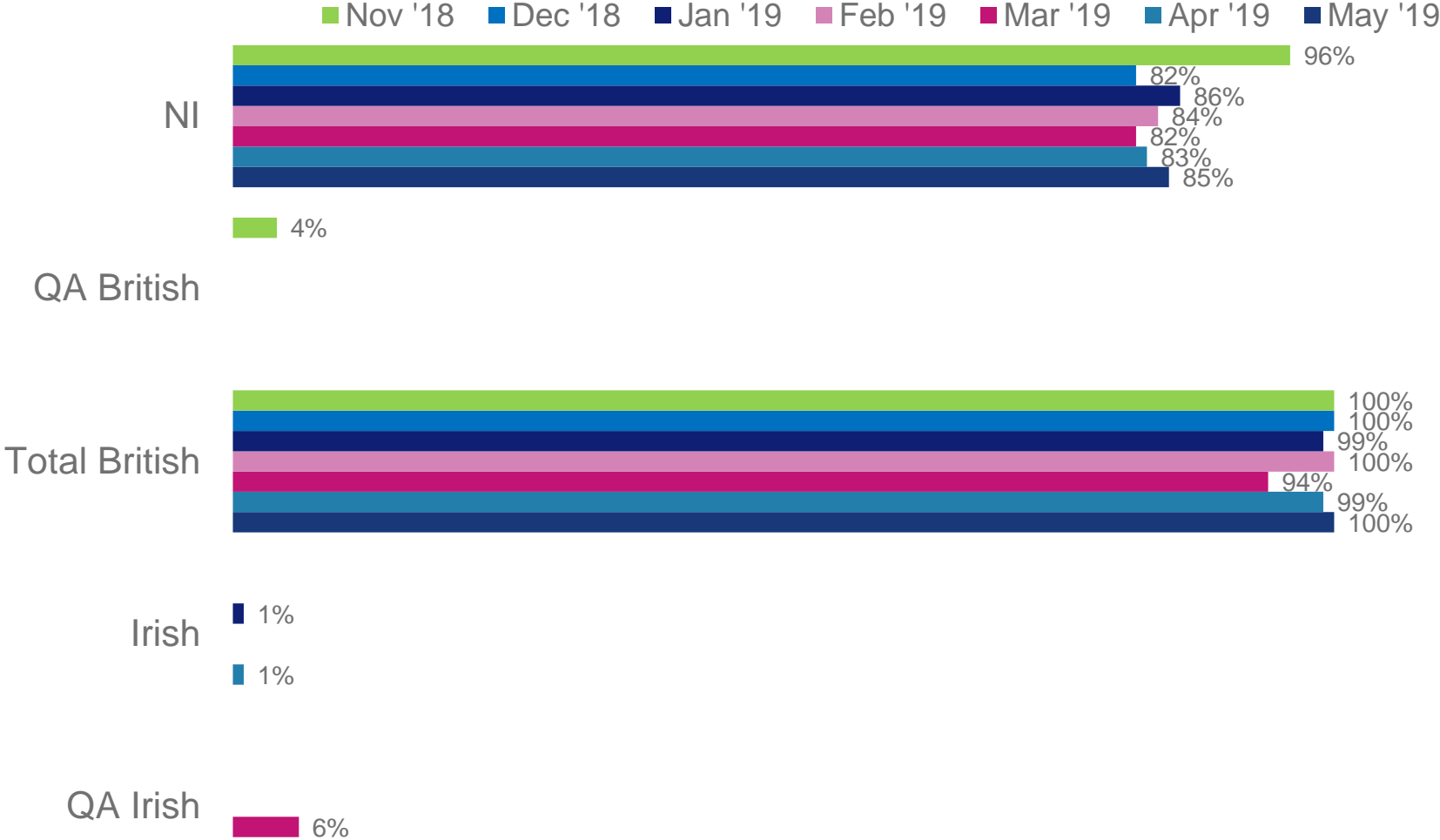


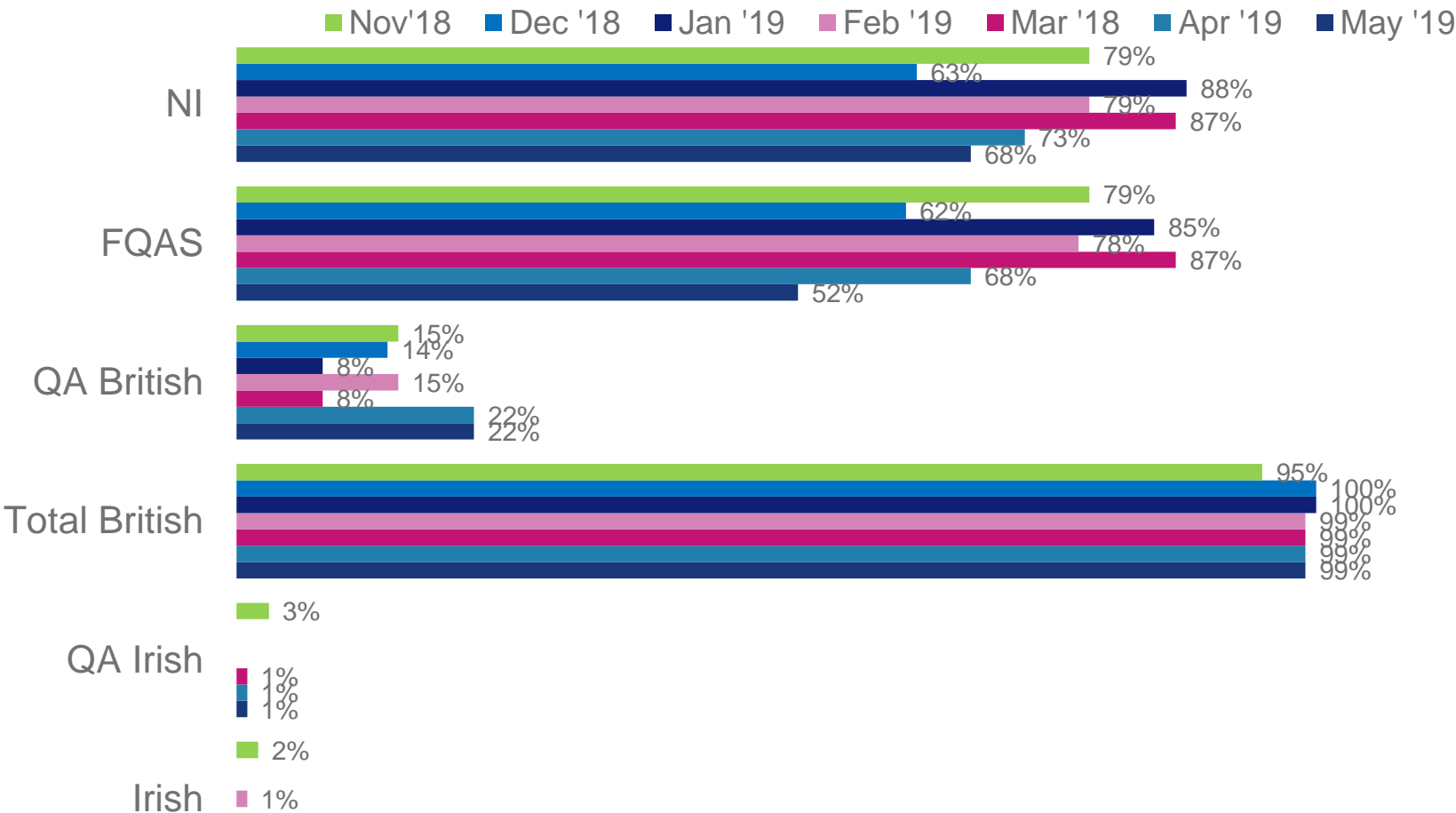
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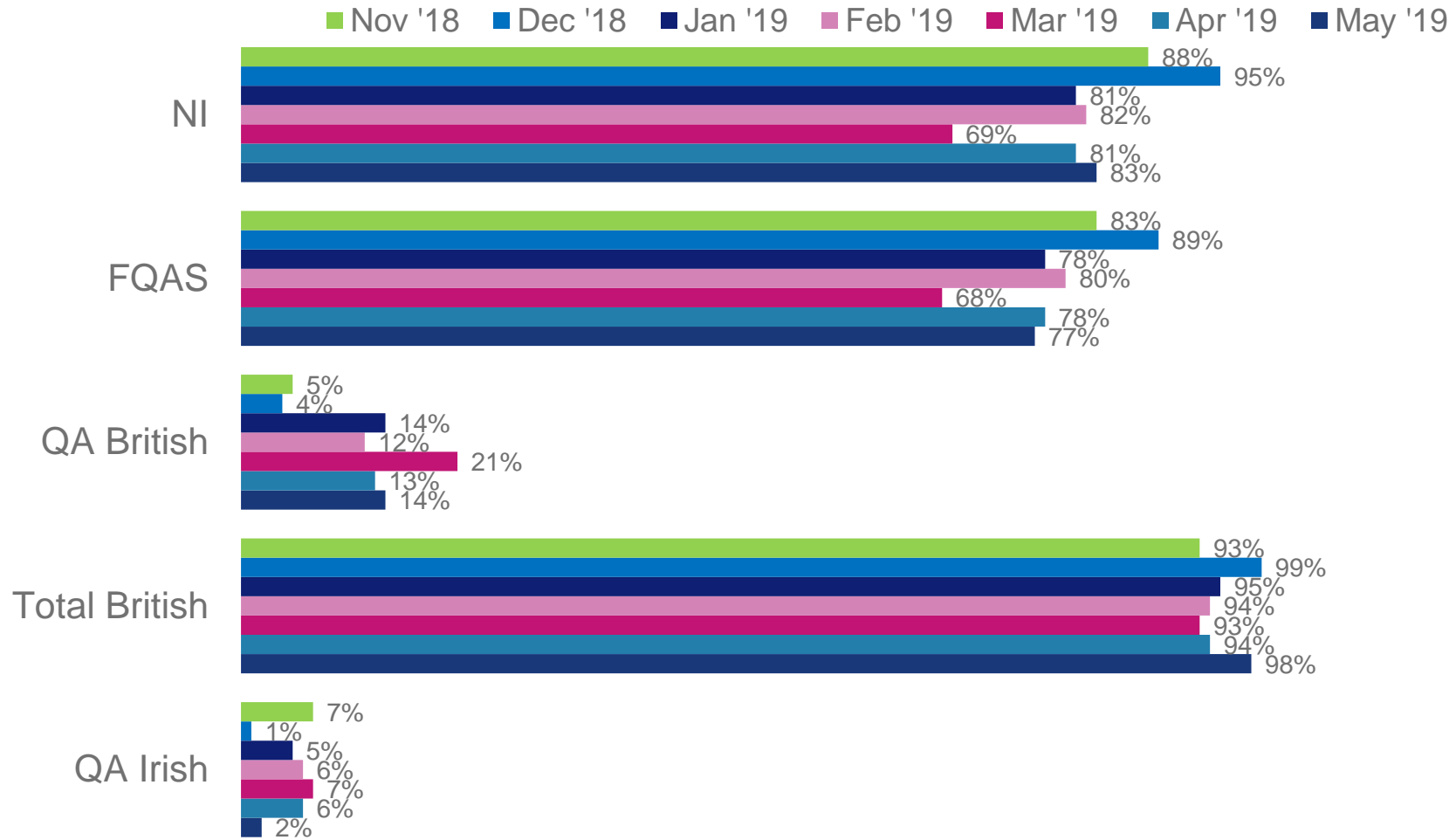
Mystery Shops: Beef

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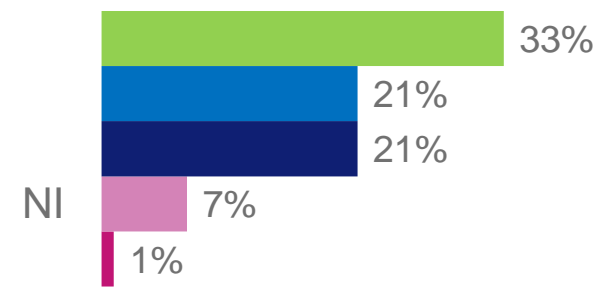








■ Nov '18 ■ Dec '18 ■ Jan '19 ■ Feb '19 ■ Mar '19 ■ Apr '19 ■ May '19







- In the Co-Op stores visited in November 2018 and April 2019, all of the relevant beef products displayed a British quality assurance logo, whilst 90% of the relevant products displayed a British quality logo in January 2019 (all of the relevant products were of British origin). Co-Op did not feature in the mystery shopping programme for December 2018, February 2019, March 2019 or May 2019.



- SuperValu did not feature in the mystery shopping programme in November 2018, January 2019 or April 2019. In December 2018, all of the relevant beef products in the SuperValu store visited were of Northern Irish origin, but none displayed the Northern Ireland Farm Quality Assured label. There were no relevant beef products in the store visited in February 2019, whilst in March 2019, all of the relevant beef products were from NI, with 14% displaying the Northern Ireland Farm Quality Assured label. In May 2019, all of the relevant beef products in the store visited were of British origin, with 96% coming from NI, but none displayed the Northern Ireland Farm Quality Assured logo.

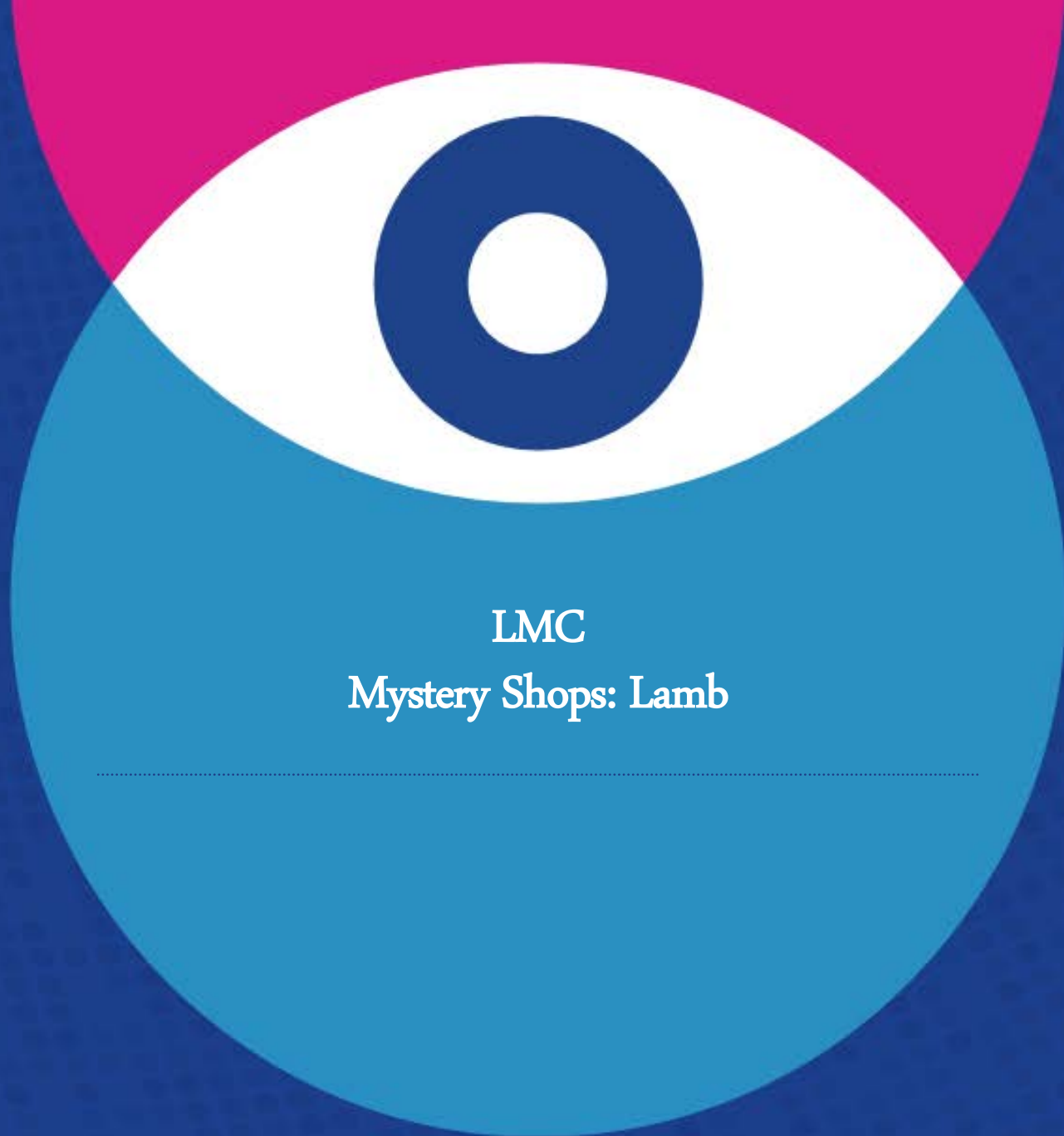


## EUROSPAR

- There were no relevant beef products in the Eurospar stores that were visited in November 2018, December 2018 or February 2019 (Eurospar did not feature in the mystery shopping exercise in January 2019). In March 2019, all of the relevant beef products were from NI, with 17% displaying the Northern Ireland Farm Quality Assured label, whilst in April 2019 all of the relevant beef products were from NI, but none displayed the quality assurance logo. In May 2019, all of the relevant beef products at the store visited were of British origin, with 11% displaying the NI Farm Quality assured label.

## Iceland

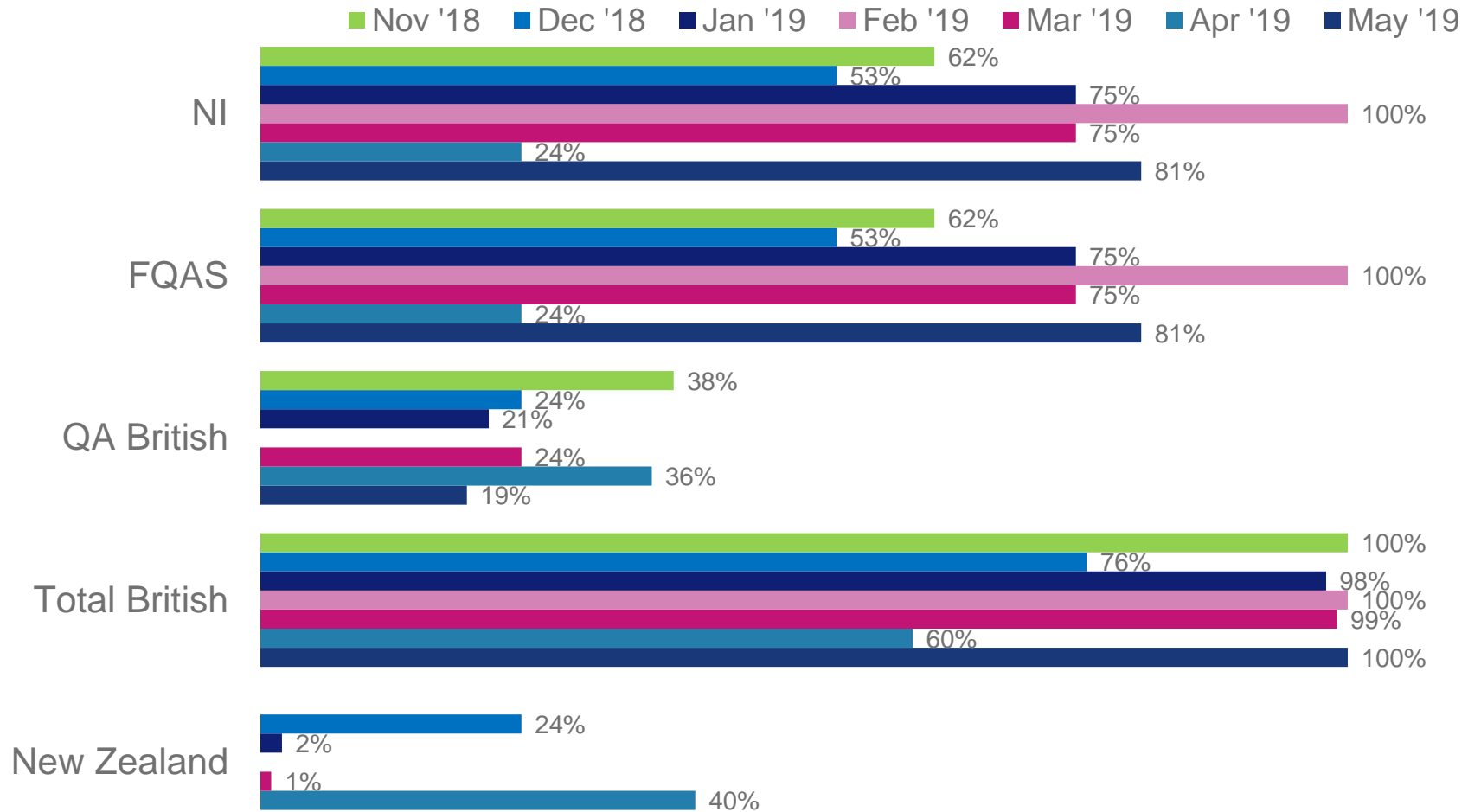
- All of the relevant beef products at the Iceland stores visited during November and December 2018 and in February, March, April and May 2019 were of British origin, but none displayed quality assurance labelling. Iceland did not feature in the mystery shopping programme for January 2019.

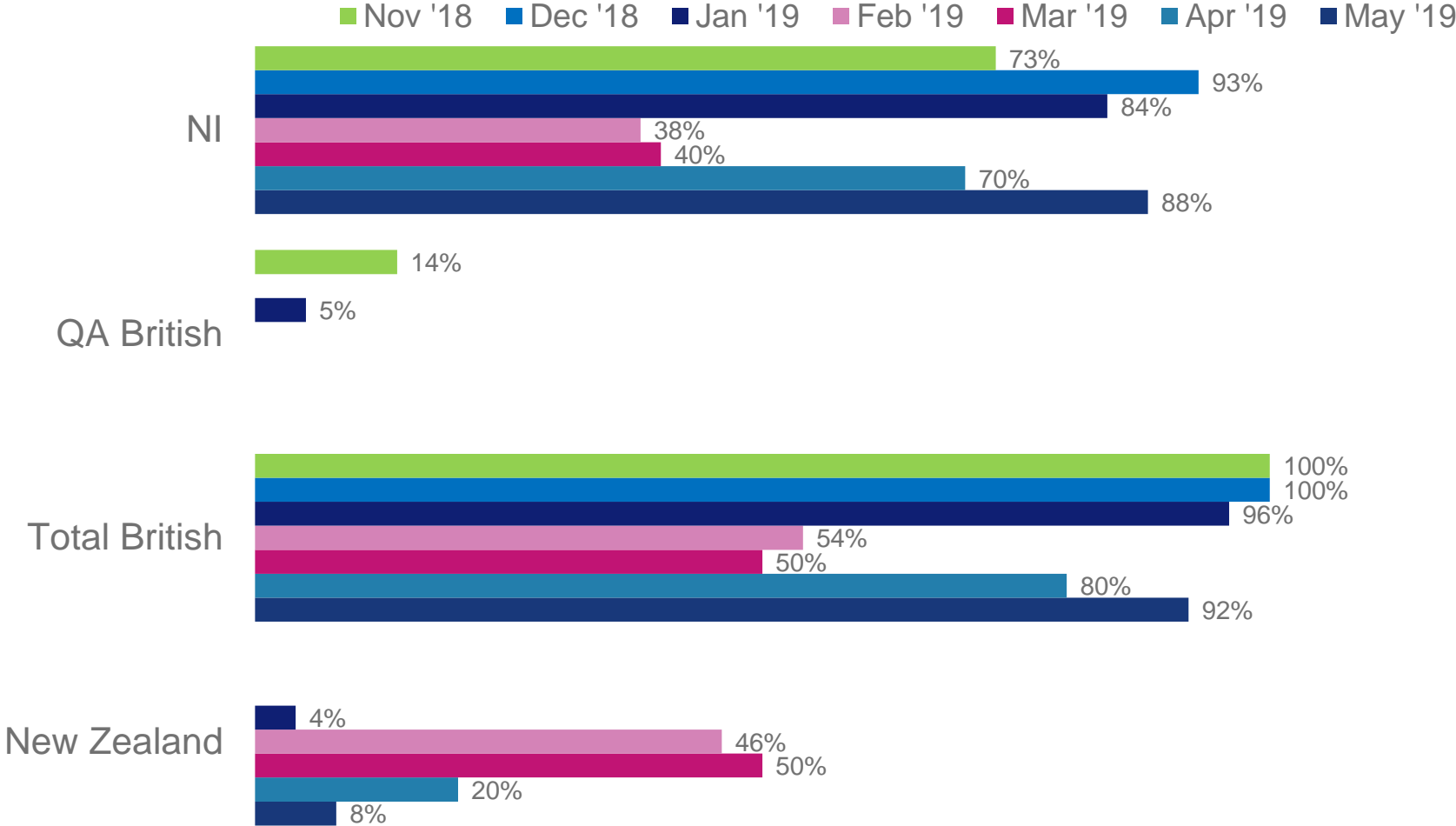


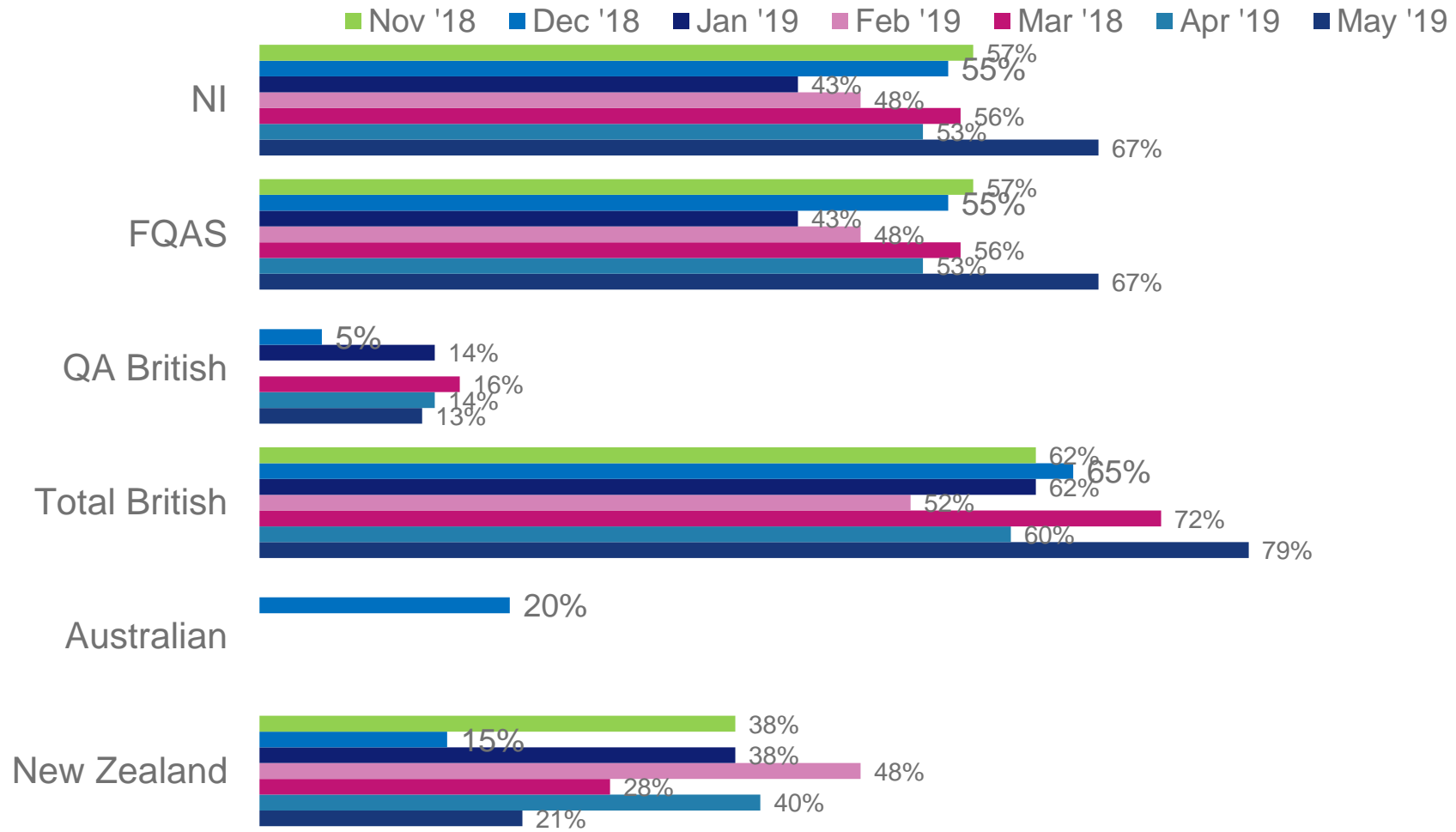
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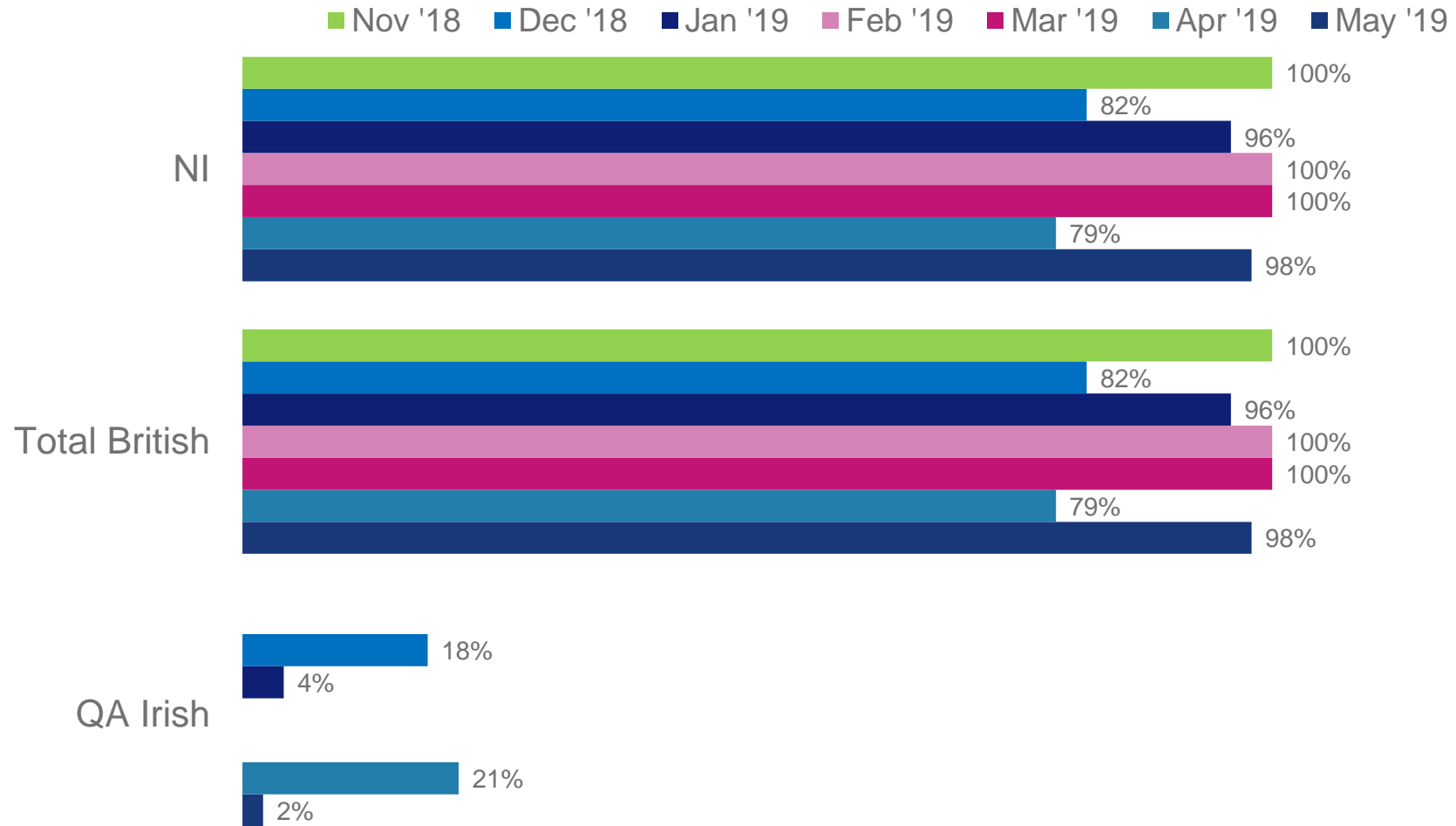
Mystery Shops: Lamb

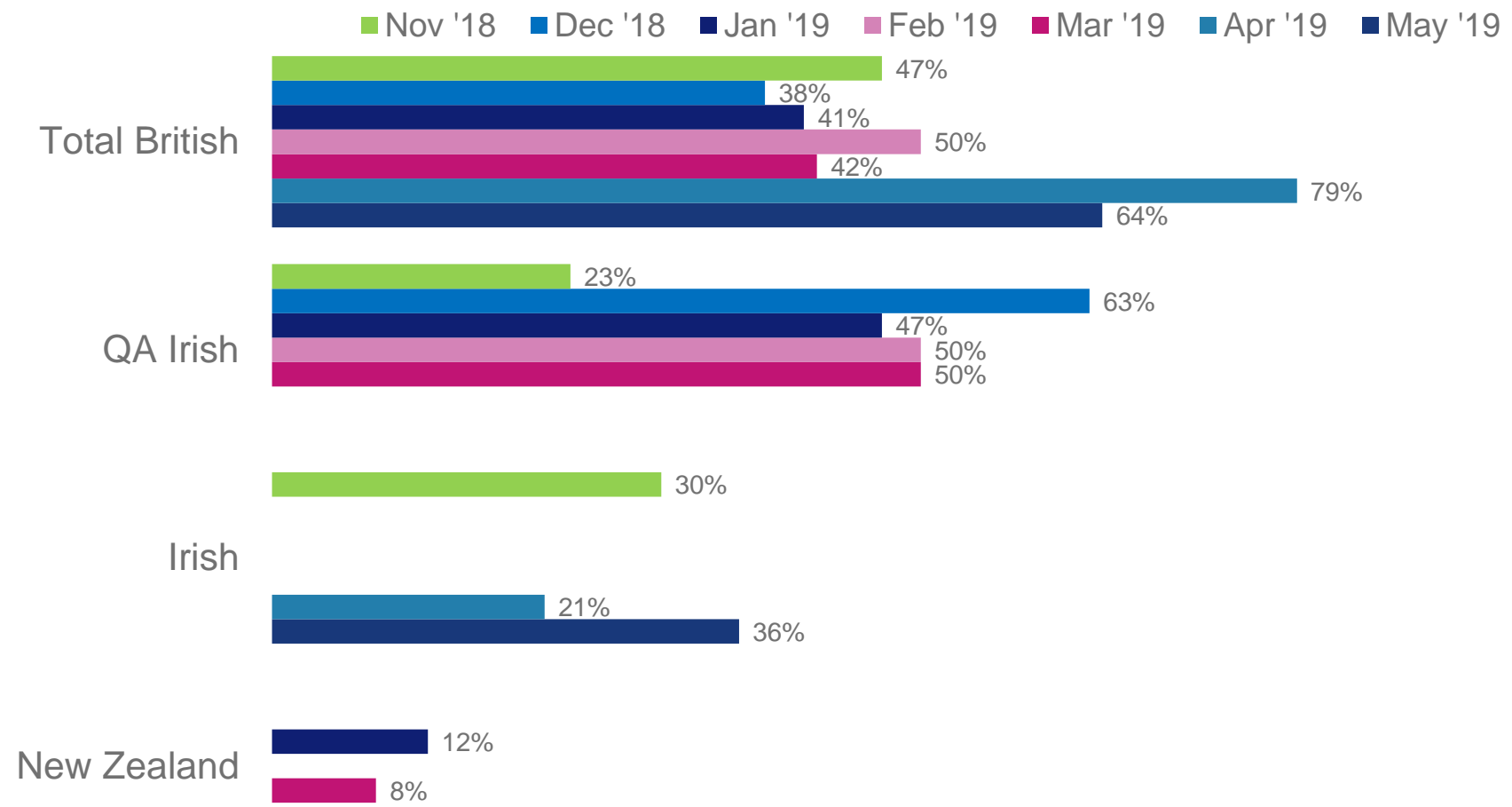
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- All of the relevant lamb products in the Co-Op stores visited in November 2018, January 2019 and April 2019 displayed British quality assurance logos. Co-Op did not feature in the mystery shopping programme for December 2018, February 2019, March 2019 or May 2019.



- The SuperValu store visited in November 2018 did not stock any relevant lamb products, whilst all of the relevant lamb products in the store visited in December 2018 were of Northern Irish origin - none displayed the Northern Ireland Farm Quality Assured label. SuperValu did not feature in the mystery shopping programme in January 2019, whilst in February 2019, all of the relevant lamb products were British in origin; 75% were from NI, but did not display the FQAS logo. All of the relevant lamb products in the store visited in March 2019 were from Northern Ireland, but none displayed the quality assured label. SuperValu did not feature in the mystery shopping exercise in April 2019, whilst there were no relevant products in the store visited in May 2019.



- There were no relevant lamb products in the Eurospar stores that were visited in November and December 2018 or in February, March and May 2019. Eurospar did not feature in the mystery shopping programme in January 2019 or April 2019.

## Iceland

- All of the relevant lamb products in the Iceland store visited during November 2018 were either of Australian (38%) or New Zealand origin (62%), whilst all of the relevant lamb products in the store visited in December 2018 were from New Zealand. Iceland did not feature in the mystery shopping programme in January 2019, whilst in February 2019, 11% of the relevant lamb products were British, 33% were Irish and 56% were from New Zealand. In March and April 2019, there were no relevant lamb products in the stores visited, whilst in May 2019, a third of the lamb was of British origin whilst two-thirds came from New Zealand.