



Baseline Perceptions of Cumbria, the Lake District and its brands

Research report on qualitative and quantitative work conducted by Ipsos MORI on behalf of the Cumbria Brand Management Group

February 2013

Introduction and Background

07/02/13

Background and objectives

- In late 2012 the Cumbria Brand Management Group commissioned Ipsos MORI to conduct a quantitative and qualitative study looking at perceptions of the Cumbrian/Lake District brand.
- The purpose of the research was to establish a baseline of public perceptions in light of the forthcoming decision around whether or not to continue the search for a viable location for a GDF (Geological Disposal Facility) in the county.
- In May 2012, Ipsos MORI reported on the results of a large, representative survey of adult residents in Cumbria which shows 53% felt the councils should take part in the search for a suitable site, <http://www.ipsos-mori.com/researchpublications/researcharchive/2970/Managing-Radioactive-Waste-Safely-Survey-2012.aspx> .



“The Lakes overall is the best-regarded destination [in the UK]... The results show the Lake District is near faultless in its image”
Mintel Report, 2009

Background and objectives

- This research was designed to explore the **general perceptions** of the area, both as a tourist destination but also the produce that it exports nationally and internationally.
- It was also designed to investigate the **interconnectedness of the Cumbrian brands** (specifically the geographic and food/drink brands) in order to measure perception stability and brand resilience in the light of potentially damaging news stories around the search for a suitable GDF location, in a way that could be replicated should the siting of a GDF be pursued.
- In January 2013, the decision was made not to continue with the government's search for a suitable location for a Geological Disposal Facility.



Methodology

- A mixed method, simultaneous, quantitative and qualitative approach was employed;

Qualitative phase

- 6 Focus groups across rural and urban areas of the UK, with the groups segmented according to frequency of visiting the region and frequency of purchase of its produce.
- 8 interviews with small, independent retailers –who are free to choose their own suppliers.
- 4 interviews with buyers in large supermarkets and distributors within the UK.
- 3 interviews with organisations which import/distribute English products in overseas markets.
- 3 depth interviews with organisations, based in the UK, who market tourism in Cumbria to overseas residents (principally Japan and North America).



Quantitative phase

- An online survey with 200 businesses in the UK, targeting senior executives/ owners involved in strategic operations within the company.
- A nationally representative face-to-face survey of 2,000 adults.



All fieldwork was completed in January 2013, and concluded prior to the decision being taken on Wednesday 30th not to proceed with the GDF.

Branding

07/02/2013

Branding - what does the market look like?

- Participants in the groups initially talked about how they are, in this economic climate, all too aware of cost constraints.
 - As such, a product's price is the most important factor driving purchasing behaviour.
- However, participants also talked of the **need** for a range of produce of differing quality and that the range of choice is much greater now, with the gap between quality and inferior products widening.
- People admitted to being less 'brand conscious' – the market is much larger so there is more competition.
- Branded goods represent the top end of the market – they are trusted, reliable, of good quality, and more expensive.
- As the supermarkets cannibalise market share, branded premium products become more niche and rarer.
 - But brands are held in higher esteem as true alternatives to the mainstream.



“The Christmas pudding I bought at Aldi, it was Orange Top, now that came second in the Which? Survey. Fortnum & Masons came 29th, so I don't worry anymore about going into Aldi.”

Female, Sutton Coldfield

Branding and substitutability

- Our price-conscious participants were also concerned with quality.
- The best brands demonstrate a lack of substitutability – put simply, nothing else will do...
- Until an alternative is produced of the same level of quality!
- But everyone has at least one product on which they will not compromise with an unbranded product....
- However, many thought of instances where a supermarket own brand product was of just as good a quality as a recognisable brand, and have purchased it instead.

“It was the nicest chutney I ever ate. But when the family came round for dinner, I didn’t put the jar out....”

Female, Sutton Coldfield

- Many small business owners bemoaned the need to stock more popular (and less niche) products in order to boost revenue.



“We probably went too high-end initially, it was too elitist. I very much see it as niche and people are also price-sensitive but they are interested in quality”

Deli owner, Sutton Coldfield

Premium brands have a mystique

- At the highest end of the market, our participants feel **premium retail brands** are not mass produced and most are only available at selected outlets.
- This is an important part of their ‘mystique’ – as the more commonplace they are, the more likely they are to lose this.
- Even the best brands can become so commonplace that they can induce consumer fatigue.
- These premium products may never produce a high volume of sales, but they are brands of integrity, and renown.
- But there was also some (albeit limited) realisation of the psychological aspect of branding – and the subliminal effects of marketing.
- Sometimes the additional cost is not reflected by additional quality.



"I think advertising is so powerful these days that things that they really want to sell they will put it in a place in the supermarket and you walk in and it hits you, and I think nowadays we are more adventurous in what we try"

Female, Berkshire

Cumbrian / Lake District Produce and Provenance

07/02/2013

Cumbrian produce and provenance = premium

- Cumbrian/Lake District produce that was tested with participants in the focus groups ticked all of the boxes around what a premium, quality brand should be.
- It was felt to be exclusive, of high quality, and to have a unique and inimitable quality to it.
- The products were not commonplace; most had been purchased in situ in Cumbria, and only one product had been spotted in supermarkets. Overall, this exclusivity added to their brand equity.
- The produce was perceived to be more expensive than other similar produce, but justifiably so.
- Professionals, including buyers and retailers, had little to say about Cumbria or the Lake District as general producers of branded goods. But, like the general public, they were positive towards it when seen through the prism of the products being tested.

“Those are things that you could put in a hamper. They’re a little bit above average aren’t they? They’re like a little bit special in their own category”

Female, Bradford

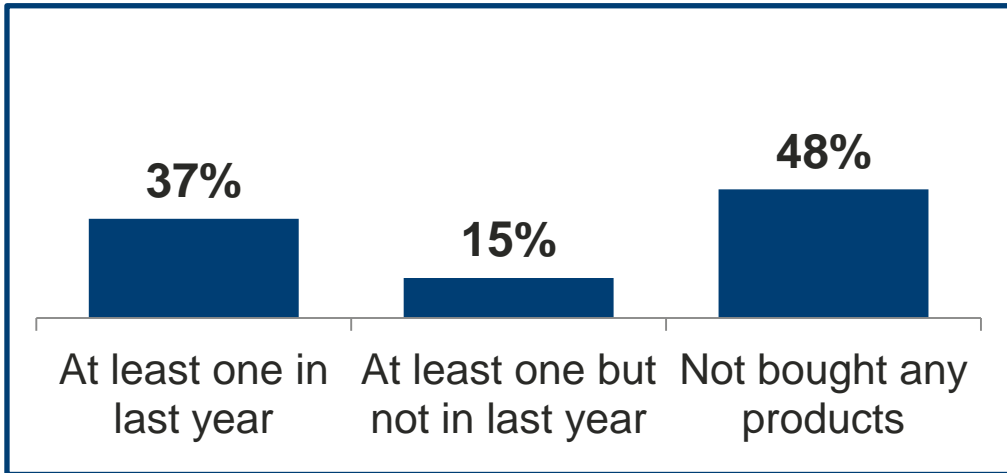


“I would look at it and think they’re going to put the prices up because it’s from the Lake District”

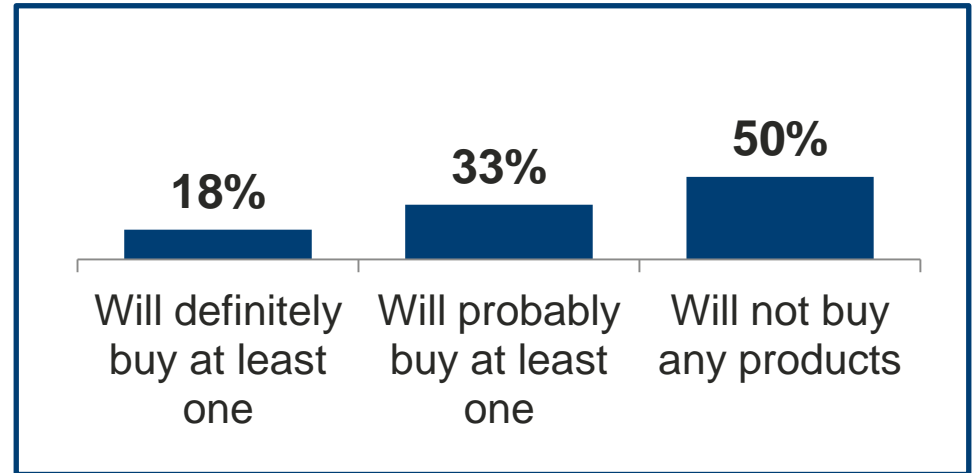
Sweet shop owner, Sutton Coldfield

In the survey, around half of the public have never bought any of the Cumbrian brands discussed and do not intend to do so in the future

Q1. Consolidated data based on past purchase behaviour of 6 individual brands



Q2. Consolidated data based on predicted purchase behaviour of 6 individual brands



Reflecting the premium perceptions of the brands in the focus groups, those in the survey who buy the Cumbrian products tested are more likely to have a higher disposable income, being from higher social grades, living in rural areas and aged 45-64.

Not surprisingly those who are frequent visitors¹ are the most likely to have bought at least one of the tested products (67% vs. 37% overall).

“When you go to the lakes, you’ve got like the little shops and the sweet shops as well and they do all the beer, I think you associate things like that more than cakes and things like that because they’re more localised”

Female, Newcastle

(Base : 1,975 British adults aged 15+, Jan 2013)

Cumbria = handled with care and pride

- In the focus groups, much of the positivity towards the products was a perception that they are traditionally crafted, using tried and tested recipes and techniques.
- The implication is that the produce is imbued with the care of the craftspeople involved and not manufactured on an assembly line.
- The manufacturing process may take longer, but this means that the produce is of a higher quality.
- However, for retailers and buyers, it is important that the products are manufactured and packaged within Cumbria, otherwise this credibility is compromised.
- Some focus group participants talked of a nostalgia that the products invoked, a reminder of the time when people “shopped in shops” and not in supermarkets.
- The Cumbrian brands have an evocative, timeless appeal.

“Images of a working kitchen, with lots of people hands on, as opposed to all made by machines on a factory conveyor belt... Adds to the authenticity of the product.”

Male, Putney

“If you got something that looks like that you don't mind spending that little bit more because you think there's been that much more time spent, rather than rushing a product out; with a family-run business you sometimes get a better tasting product”

Male, Dunfermline

The tourist experience is primary trigger for purchase

- Amongst those focus group participants who had tried the selected Cumbrian produce, most had done so in Cumbria itself, often in farm shops along the tourist trail.
 - This is in keeping with their perception of the produce as artisanal, handcrafted produce made at source
- Most had tried the produce in the area itself – it is part of the ‘tourist experience’ and they are happy to pay more for these ‘destination brands’.
 - It is not part of a conventional retail experience, therefore price is not a factor
- Tellingly, the one ‘mass market’ brand, often available in supermarkets, was viewed less positively.
- However, some amongst those who had never visited were more suspicious that it was all simply a ruse...

“You go to the Lake District, it’s everywhere in the shops so you think ‘I’ll try that and see what it’s like’, but it’s not something you would eat a lot of”

Female, Sutton Coldfield



“You think of the Lake District, you think of all the tourists there, and sometimes you’re put off some products thinking, is that the true value of the product or is that...the business that they’re trying to generate?”

Male, Dunfermline

Does brand Cumbria offer a unique selling point?

- On balance, for focus group participants and professionals alike, there was little distinction around Lake District produce, as opposed to that of any other rural area in the UK. For many, there is little distinction between *the area itself* and other rural areas in the UK.
- Generally for retailers, perception of Lake District produce is felt to be on parity with perception of that from other rural areas. This is particularly the case amongst those who have never visited the area.
- One distinctive characteristic mentioned focus group participants by some was Cumbria's geographic isolation. This accentuated the traditional and authentic nature of its produce – the perception that it is 'untouched by progress'. There is a **pride** attached to the produce.
- For others, Cumbria's key characteristic is around purity and a **lack of contamination**.



"I don't know if it's the quality of the water up there, the hop selection, but they are good beers" **Vintner, London**

"Conjure up images of beautiful corn fields and fields and cows roaming. Feeling that it might have been made the day before"
Female, Putney

For professionals, provenance has a role

- Retailers and buyers felt that provenance is an important factor in judging the relative worth of a product, but it should only be used judiciously and not universally.
- There was a key difference here between small independent retailers and buyers for larger retailers.
- Smaller, independent retailers were keen to push stock which proclaims its provenance as part of its brand.
 - They tended to stock more high end, esoteric produce and use provenance to encourage product trials.
- For buyers in major supermarkets, many of whom aim to promote own brand produce, provenance is less of a consideration.
 - Taste, quality and packaging are all more important.
 - Provenance is only employed in branded goods, or their premium ranges.
 - And it needs to be comprehensible!


The aspirational aspect of the brand doesn't have to be driven by provenance. I mean, that could be driven by the way they market it. But provenance is just one aspect of the overall appeal of a product, and I would argue a very small one.

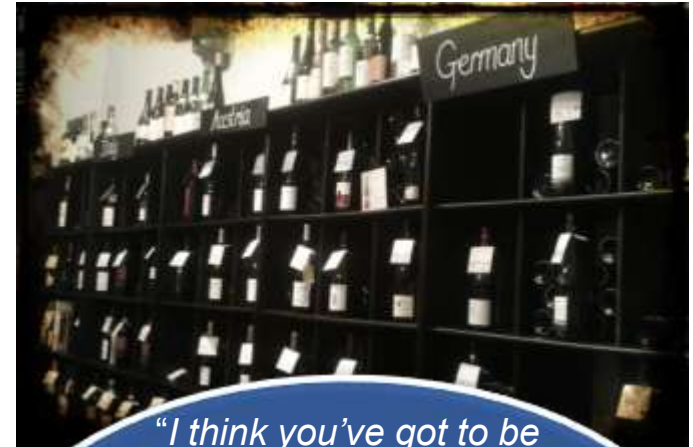
Buyer, large supermarket

"Do people understand it, if you say a Malaysian coconut do they really know that it would be any different if it wasn't Malaysian? I think if you add provenance to the top tier I guess you're expecting a bit more of an educated customer."

Buyer, large Supermarket

For customers, provenance piques interest

- Group participants admitted that provenance is an important factor in their opinion of what shapes a 'good brand'.
- Though it may not necessarily shape their purchasing decisions, in some sectors (for example, a vintner), it is crucial. 
- Often, general public participants admitted to being more swayed by the **packaging** rather than the **area** from which the product originated.
- And when provenance is discussed, many make the distinction between the manufacturing location vs. where the product originated.
- The latter is most important, but a less desirable manufacturing location does run the risk of damaging the good that the provenance has created. This is typically rural or exotic produce, being either manufactured or packaged in an urban, industrial setting.



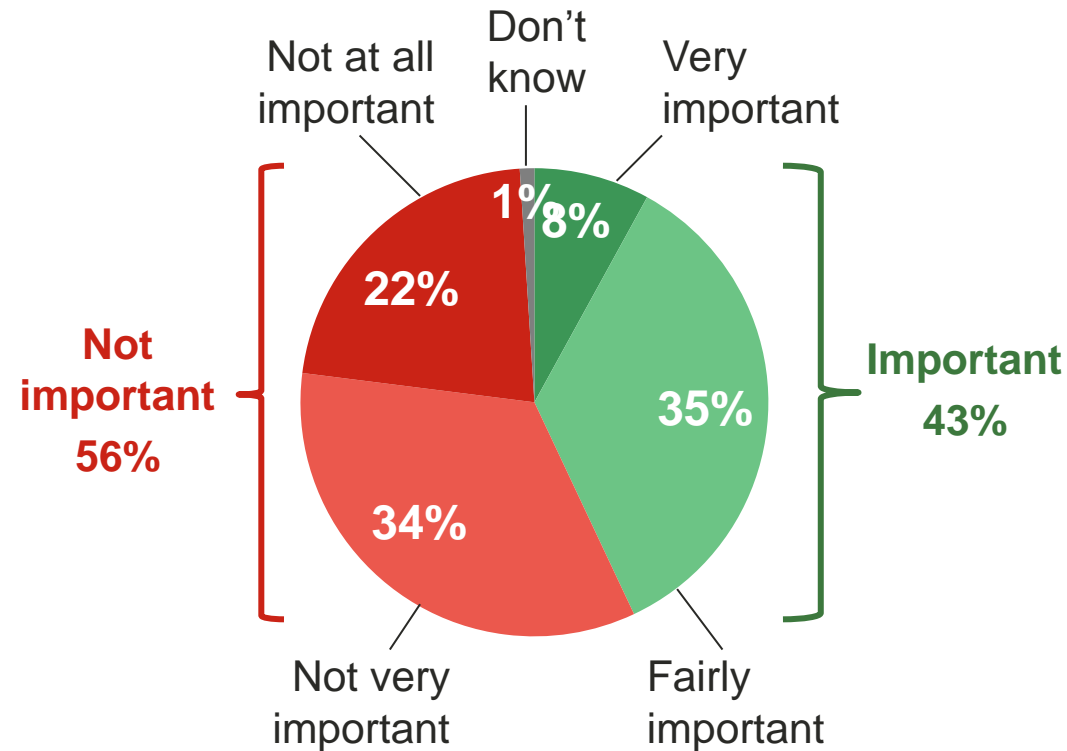
"I think you've got to be careful, I mean Newcastle Brown Ale it's made in Yorkshire, so at one time that was associated with Newcastle but now it's just a global brand"

Male, Newcastle



Provenance is less important than product image

Q3. How important, or not, is it to you where these brands are made?



"Yeah, anything that promotes who's making it, then you also think 'expensive'" **Female, Birmingham**

- For over half of those questioned in the survey (56%), provenance is **not important**.
- Provenance becomes more important where disposable income means price is less of an issue, for example, it is more important for the following:
 - Older people (49% of those aged 55+ say provenance is important)
 - Higher social grades (48% of those from AB social grades)
 - Frequent visitors to the Lake District (56% of those who have visited more than once in the last year)
- It is clear from the focus group discussions that even here the attraction is down to perceived exclusivity.

(Base : 1,975 British adults aged 15+, Jan 2013)

Ipsos MORI

Local is best!

- **Proximity, rather than provenance, is often a more important factor for the general public**
- In smaller, independent stores, local produce is requested. Often this means regional farm produce (e.g. from the Midlands) is preferred but sometimes this means UK produce, rather than international.
- There are two reasons for this:
 - Patriotic/regional duty – it is important to support local/UK businesses
 - The unnecessary cost, and carbon footprint, of shipping international produce when domestic produce is just as good.
- Fruit and vegetables are a good example – proximity is more of an important factor than quality.
- Organic/ethical issues are also an important purchasing factor.

“I like to know my potatoes are Scottish potatoes or Lincoln potatoes; I wouldn't buy them from Egypt if I can get Lincolnshire or Scottish, because I just prefer them to be local to where we live, as locally as we can get.”

Female, Bradford



“The amount of people that won't buy strawberries if they aren't English...I'm surprised about how many people want organic and are willing to pay twice the price.” **Premium greengrocer, South London**

The Cumbrian / Lake District brand

07/02/13

The Cumbrian / Lake District brand

- Generally (and reassuringly) among all the audiences in this research views are what one might expect!
- Mostly positive associations; beautiful, scenic, expansive, open, untouched.
- But there was also a minority of less positive associations: rainy, windy, remote, and with congested roads in peak season!
- But these are not necessarily negative associations (rainy, windy, remote), just what people expect from the area...
- Interestingly, it was better known for lakes than mountains.

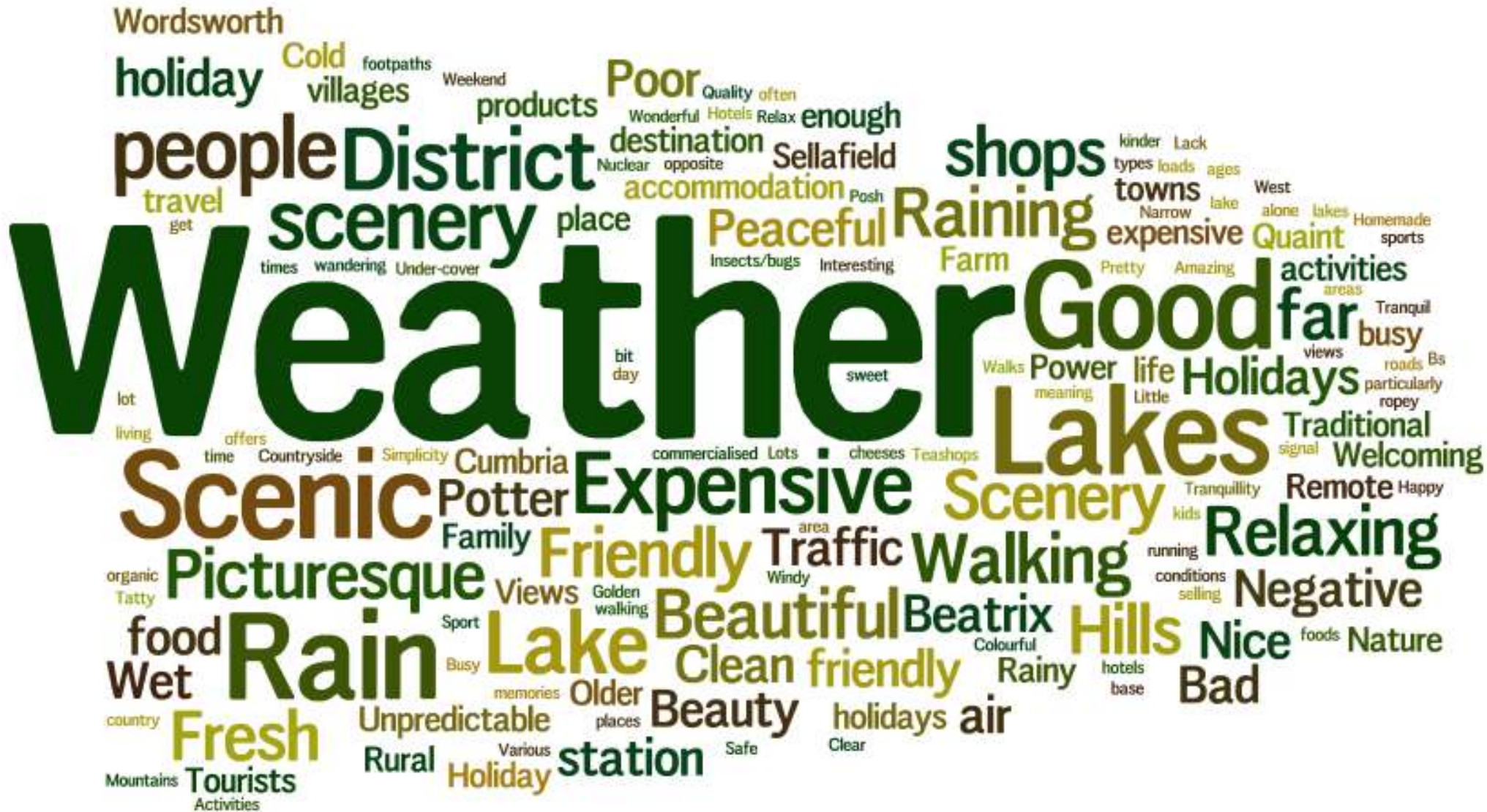


"It's like stepping back in time ...you do feel like you're in a completely different place, just...a completely different part of the world, because everything seems slower; everything is completely different" **Male, Berkshire**

"I think the pubs and the open fires, the pub food, the view, you can get really, really nice home cooked food..People have got a way of life; the pace is slower."

Female, Bradford

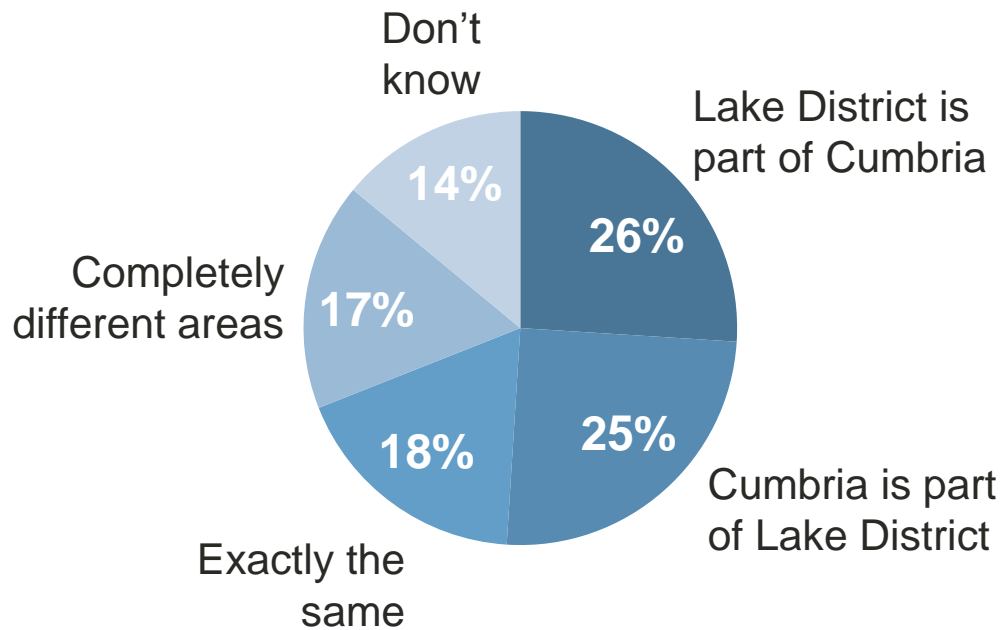
Wordlesworth? – Words and images about Cumbria and the Lake District from our 'mindcloud' exercise in the focus groups



Survey responses show that the public are not sure of the link between the Lake District and Cumbria

Q7. Which one of the following statements do you think is true?

26% correct



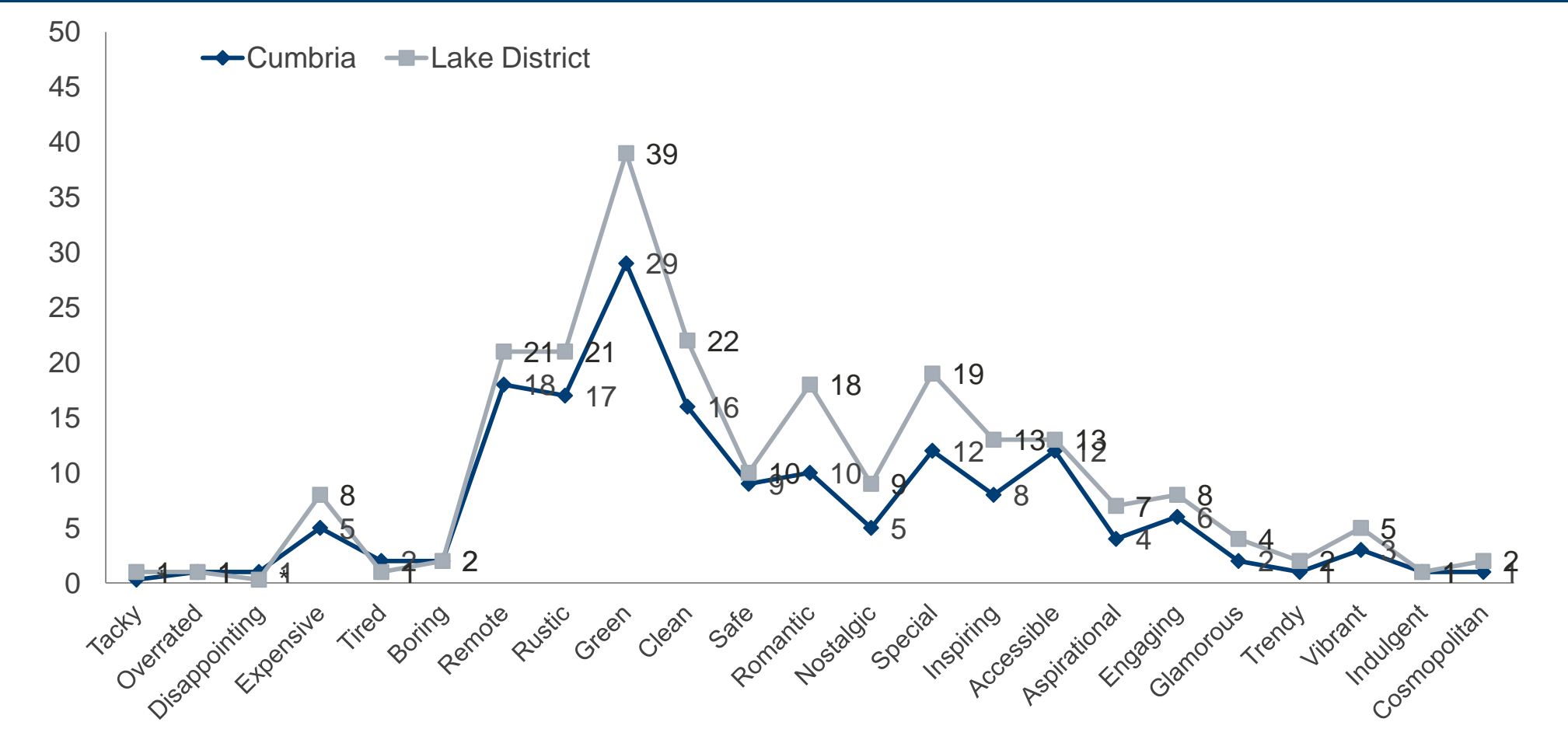
- Crucially, even amongst those who have visited, there is very little difference between their perceptions of ‘Cumbria’ and ‘The Lake District’.
- The areas are felt to be completely interconnected – almost indistinct – but with some realisation that the Lake District is contained within Cumbria.
- Some older participants in the focus groups also used phrases such as “The Lakes”, “Lakeland” or “Cumberland”, which confuses the issue even more.
- In the survey, only four in ten frequent visitors¹ (39%) think the Lake District is part of Cumbria - a third of the same group (34%) think Cumbria is part of the Lake District.

(Base : 1,975 British adults aged 15+, Jan 2013)

¹Frequent - All visiting more than once a year
Ipsos MORI

For survey respondents the two areas have similar images, although the Lake District has higher brand recognition

Q9. From this card, which, if any, of these descriptions would you use to describe ...?



(Base : 1,975 British adults aged 15+, Jan 2013)

Source : Ipsos MORI

West Cumbria's brand dissonance

- In the focus groups, a key association with the Lake District was around its purity - it is felt to be **untarnished and unpolluted**.
- Tying in with the perception of how its produce is made, it is felt to be untouched by modern industry.
- Only a minority (including those in the groups who visit frequently) were able to identify any differences *within* the area (that is between the West Coast and the Lakes themselves)
- Few associated Sellafield with the Lake District – non-visitors in the groups were particularly surprised that it was there – many thought it was in Lancashire or further north. This caused some to question whether they would choose to travel to the immediate proximity of the plant, but none to change their general view of the area as a whole.

"It's a bit of a mixture; I've been on training down there [West Coast] and you get some beautiful countryside and then you get industrial parts - fish with two heads, isn't it?"

Male, Newcastle

"You can take a deep breath up there without coughing your lungs up"

Vintner, London

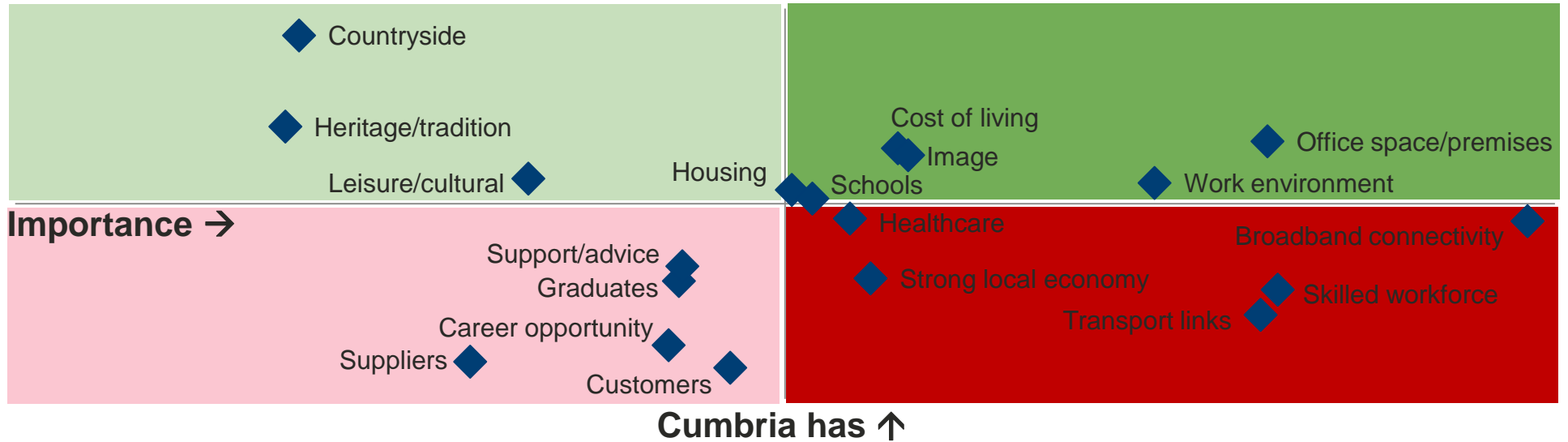
"I remember falling in love with the Lake District and one day we went over to the coast and came across this blot on the landscape"

Female, Berkshire



For business, Cumbria offers much, but can it deliver the business essentials?

Q1. On a scale of 1 to 10, how important or not do you think the following factors are in helping to attract businesses to an area.
Q10. To what extent do you feel that Cumbria provides these factors?



The business survey asked both how important factors were to the organisation and also how well Cumbria provides these factors. Cumbria is strong on the physical qualities of life and work (top right quadrant), but is believed to perform less well on business essentials (bottom right quadrant).

Smaller organisations (with turnover of less than £1.5M) are generally more positive about Cumbria. A greater knowledge of Cumbria (know a lot/fair amount) generally increases positivity, although it has a negative impact on perceptions of broadband connectivity. While operating in the North West improves perceptions of Cumbria having a skilled workforce it has little impact (positive or negative) on other factors.

Familiarity and Favourability

07/02/13

Frequent visitors tend to be more affluent

- In the survey of UK residents, 16% have visited the Lake District in last year (Mintel 2009 also reported 16% having visited the Lake District).
- Frequent visitors to the Lake District are more likely to be from higher social grades (10% of AB respondents vs. 7% overall).
- The main pull is the Lake District, while West Cumbria is not seen as a tourist destination.

Q5. Using the answers on the card, how often, if at all, have you visited...?

Q6. And in the future, how likely, or not, are you to visit...?

	Past (Q5)			Future (Q6)		
	Ever Visited	Frequent Visitor ¹	Infrequent Visitor ²	Will Visit	Will Definitely Visit	Will Probably Visit
The Lake District	58%	7%	51%	44%	14%	30%
Cumbria	48%	6%	41%	32%	9%	23%
West Cumbria	35%	3%	32%	24%	6%	18%
The Yorkshire Dales	50%	8%	42%	36%	11%	25%

(Base : 1,975 British adults aged 15+, Jan 2013)

Ipsos MORI

The image of the area

- Focus group participants see there is a wide variety of activities to pursue once in the area –
 - For some, particularly older participants, it was an opportunity to unwind and do very little, other than take in the scenery.
 - For others, particularly younger participants, the Lake District is associated with more outdoor sports, such as windsurfing or rock climbing, and is a less 'sedate' holiday destination.
- Others were simply happy to immerse themselves in a totally different and unfamiliar landscape....
...with a completely different pace and way of life.



"It feels like an active weekend away holiday destination, so I wouldn't necessarily just associate older people that do it; people may be seeking adventure or exercise."

Female, Putney

An embodiment of the Lake District

When asked what an embodiment of the area would look like, one image formed was of an older, but physically fit man, weatherworn and full of character...

“Tweeds, boots, flat cap, rugged face, twirly moustache, a rough beard. He owns two Springer spaniels. And he’s got an old Nokia 3310 phone. And a battered Range Rover.”

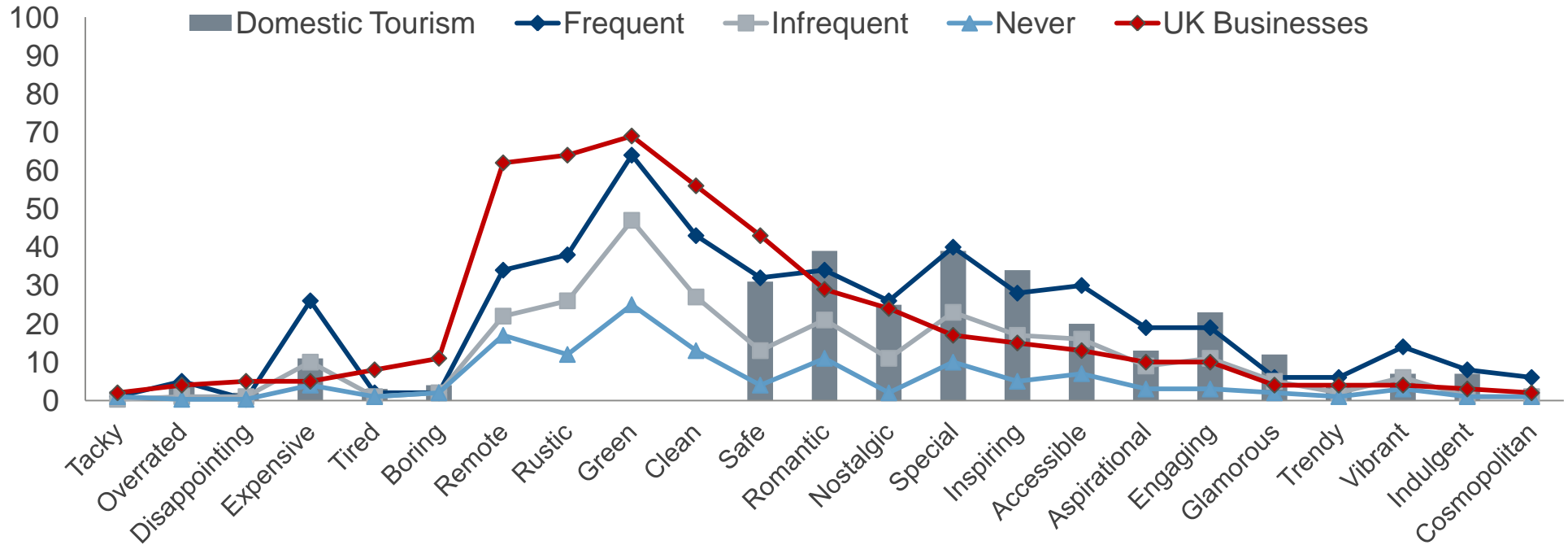
Participants in Putney



“This guy’s not got a facebook account”
Buyer, Supermarket

The Lake District has a similar image amongst all groups, albeit stronger amongst frequent visitors

Q9. From this card, which, if any, of these descriptions would you use to describe the Lake District?



- Crucially, businesses are more likely than average to think the area is remote.
- Frequent visitors and businesses are most likely to view the Lake District as rustic, green, clean and safe, but also as expensive.
- Figures are broadly in line with the findings of the Mintel Report 2009.

Bases : UK Businesses - all respondents (202), Jan 2013; CAPIbus – all adults aged 15+ (1975), Jan 2013

Source : Ipsos MORI

Views of tour operators

- Amongst tour operators who market the area in North America and Japan, the brand equity of the area is particularly strong.
- This is especially true in Japan, where the Lake District has almost legendary status. It is second only to London in its appeal to this market.
- The Lake District is seen to be the embodiment of traditional northern England.
- The presence of Sellafield to some extent enhances its reputation, as the Japanese embrace, and are fascinated by, energy technology.
- The Americans, on the other hand, are more attuned to potential hazards which may put them off an area, though these are mainly centred around personal security, linked to a fear of terrorism.

“I think other than London I think the Lake District is possibly the next big attraction. From living in Japan, there’s always been documentaries about the Lake District.”

Tour Operator

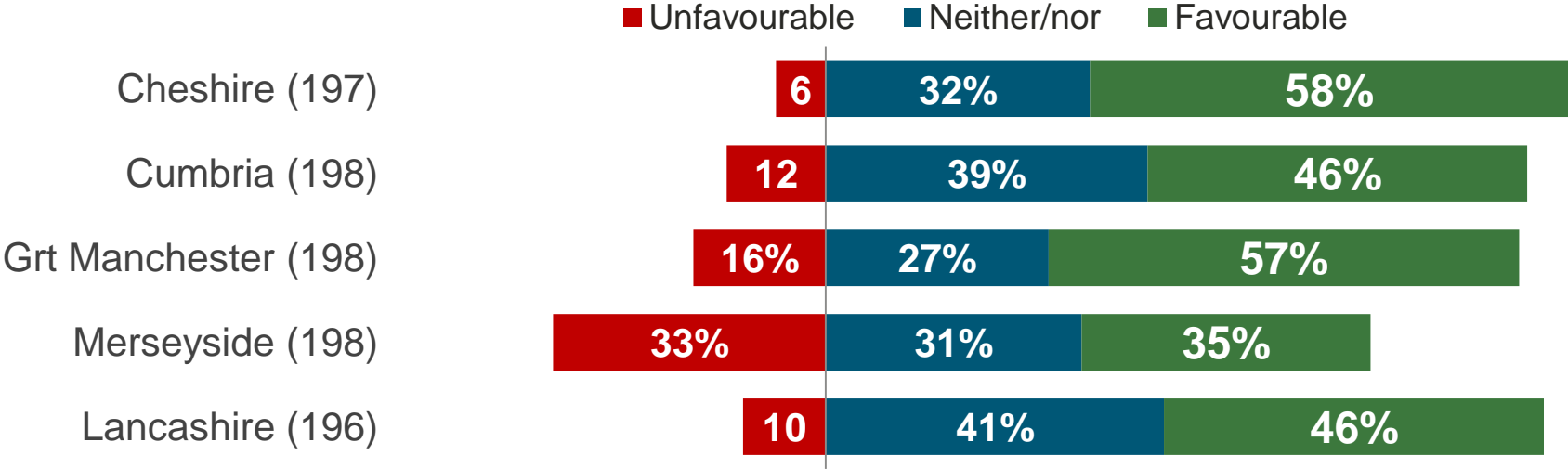
“The American market I think is susceptible to any problem that is going on. They’re possibly more susceptible than some of the other markets that we get. But certainly over the time that I’ve been doing it here it’s not really been a problem at all”

Tour Operator

Among businesses, knowledge increases positivity but overall awareness is low

- Over half (53%) of businesses spontaneously mention Cumbria as in the North West, lower than Lancashire (74%), in line with Cheshire (49%).
- Perceived knowledge of Cumbria is low (38% say they know well/a fair amount).
- Among those who operate in the North West, knowledge of Cumbria is lower than for the other counties (43% compared to 83% say they know Greater Manchester well/a fair amount).
- Half are favourable to Cumbria, rising to 70% among those who know well/fair amount.

Q7. Taking into account any of the things you think are important, is your overall opinion and impression of each county favourable or unfavourable?

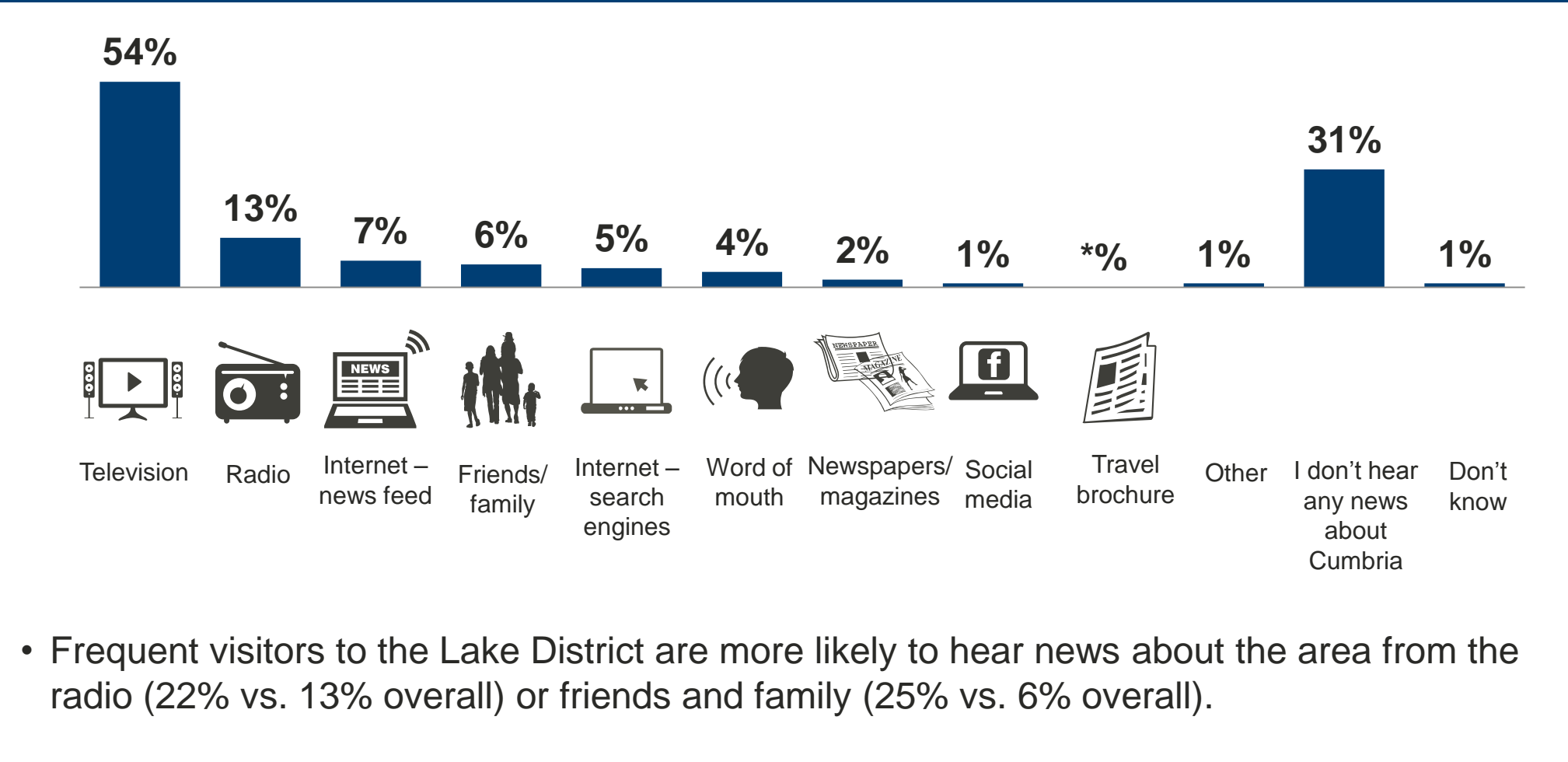


(Base : All business respondents who know the county (see above), Jan 2013)

Source : Ipsos MORI

Among UK residents, more than half hear news about Cumbria and the Lake District on television, although a third hear nothing

Q8. How do you normally hear news, if you do at all, about what is happening in Cumbria and the Lake District?

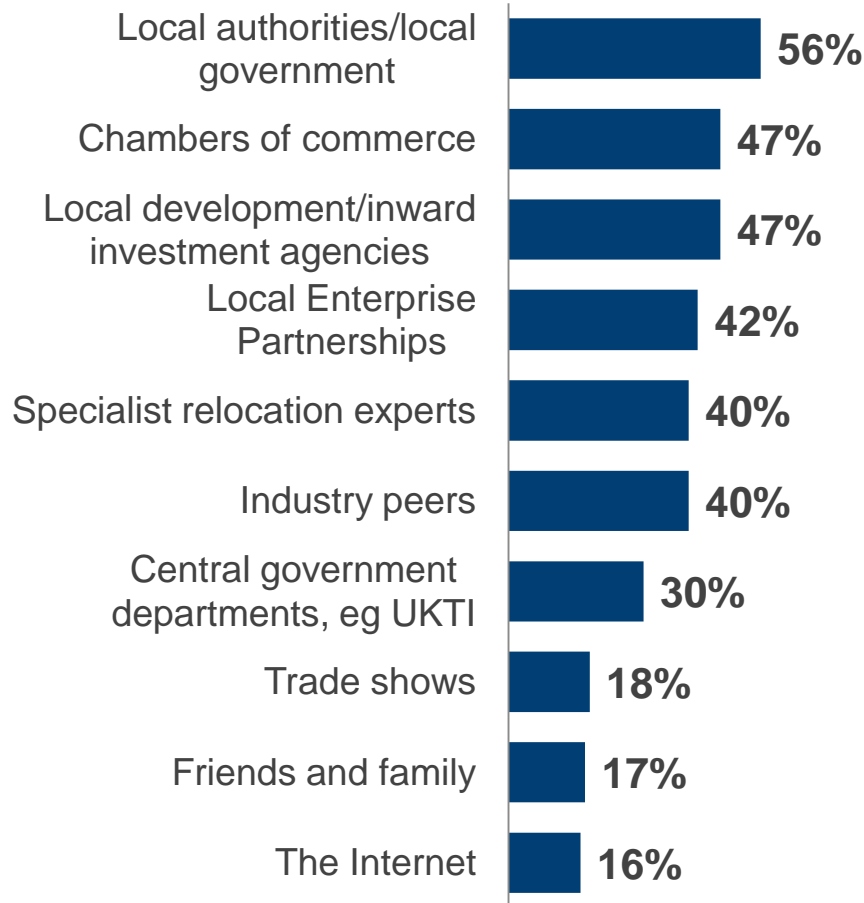


- Frequent visitors to the Lake District are more likely to hear news about the area from the radio (22% vs. 13% overall) or friends and family (25% vs. 6% overall).

(Base : 1,975 British adults aged 15+, Jan 2013)

For businesses, local knowledge is the most authoritative source

Q3. Where would you go to get this information?



- Businesses want their information in the form of face-to-face meetings (47% mention this), backed up with websites, in-depth and summary reports/case studies and articles in the trade press
- What businesses most want to know is:
 - Transport links
 - Availability of skilled workforce
 - Cost (of employment/site/premises/relocation)
 - Market information

(Base: UK Businesses - all respondents (202), Jan 2013)

Source : Ipsos MORI

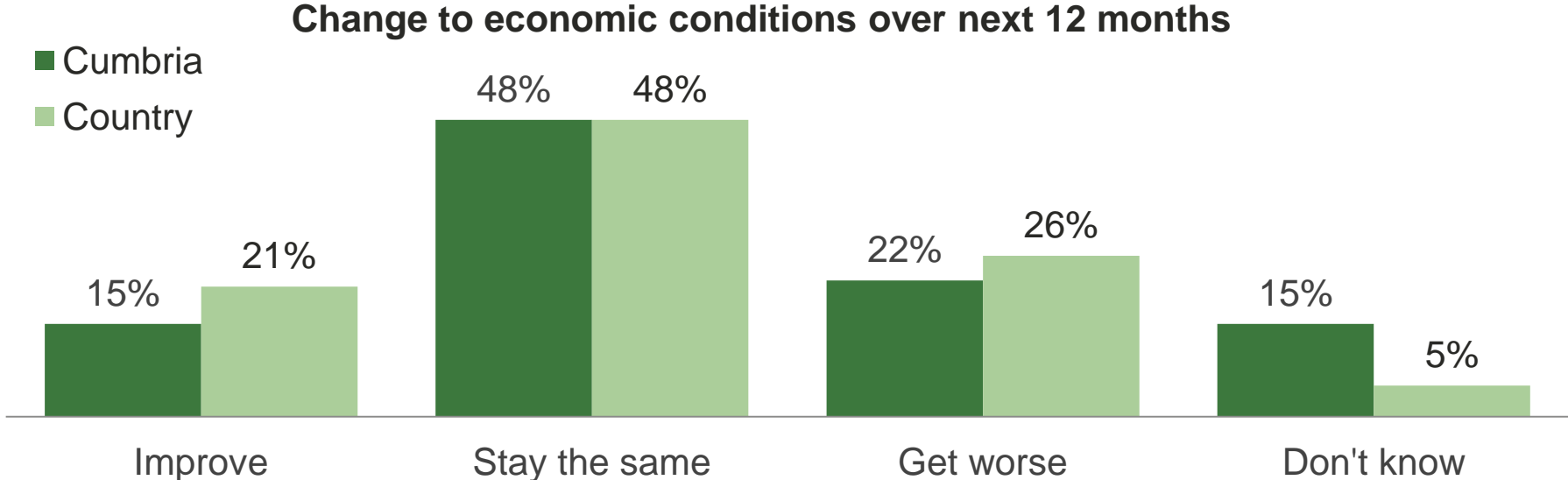
Business Perceptions

07/02/13

Businesses are less positive about Cumbria – they think that Cumbria faces the same problems as the UK but is not as well equipped to cope

Q16. Do you think that the general economic condition of Cumbria will improve, stay the same, or get worse over the next 12 months?

Q17. And do you think that the general economic condition of the country in general will improve, stay the same, or get worse over the next 12 months?



- There are no differences compared to the UK overall in the proportions saying Cumbria’s economy will improve, or get worse, over the next 12 months.
- However, four in ten (38%) feel Cumbria is worse equipped than other areas to cope with the current economic downturn.

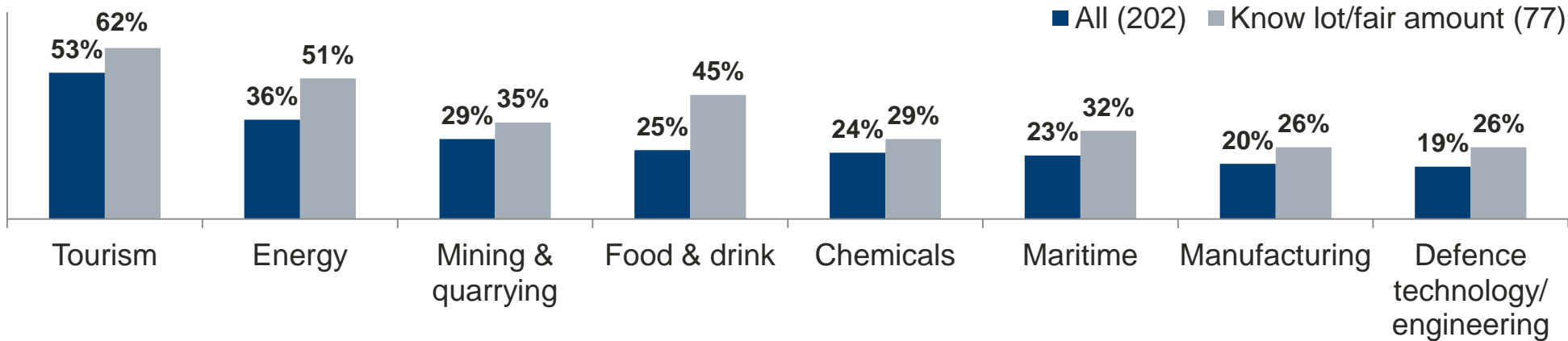
(Base: UK Businesses - all respondents (202), Jan 2013)

Source : Ipsos MORI

There are poor perceptions of Cumbria as a business location amongst businesses

- Half believe Cumbria is worse than other areas in the UK as a business location:
 - 54% say the North West is a good business location, 12% say poor location
 - 15% say Cumbria is better than other areas, 53% say worse, 26% say it is the same.
- Tourism is perceived as the main industry in Cumbria, followed by Energy, Mining and Food & Drink. Knowledge increases awareness of Energy’s role in Cumbria’s economy.

Q12. Which industry sectors, if any, would you associate with Cumbria?



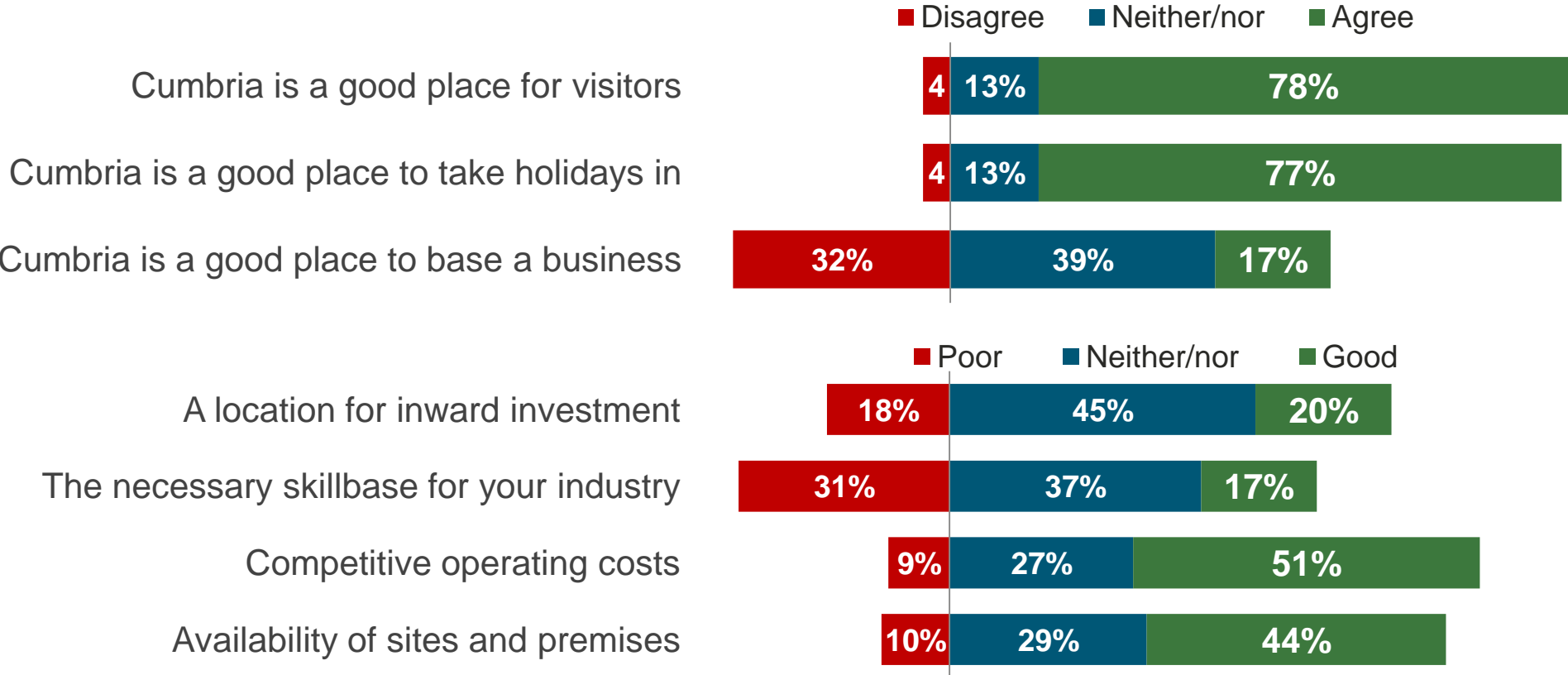
(Base: UK Businesses - all respondents (202), Jan 2013)

Source: Ipsos MORI

For businesses, Cumbria is a tourist destination, it can compete on cost but not on economic return ...

Q19. How much do you agree or disagree with the statements ...?

Q13. How good or poor you would say Cumbria is for providing the following ...?



(Base: UK Businesses - all respondents (202), Jan 2013)

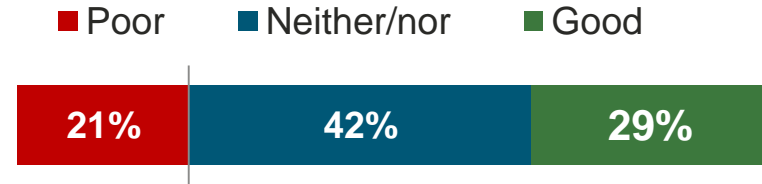
Source : Ipsos MORI

... and reputation does not add significant benefit

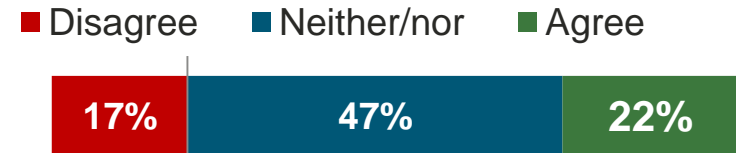
Q13. How good or poor you would say Cumbria is for providing the following ...?

Q19. How much do you agree or disagree with the statements ...?

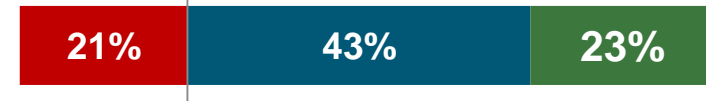
An image to enhance your brand reputation



Cumbria has an image that does not reflect the reality of the region



Cumbria is too diverse to be promoted as a single area

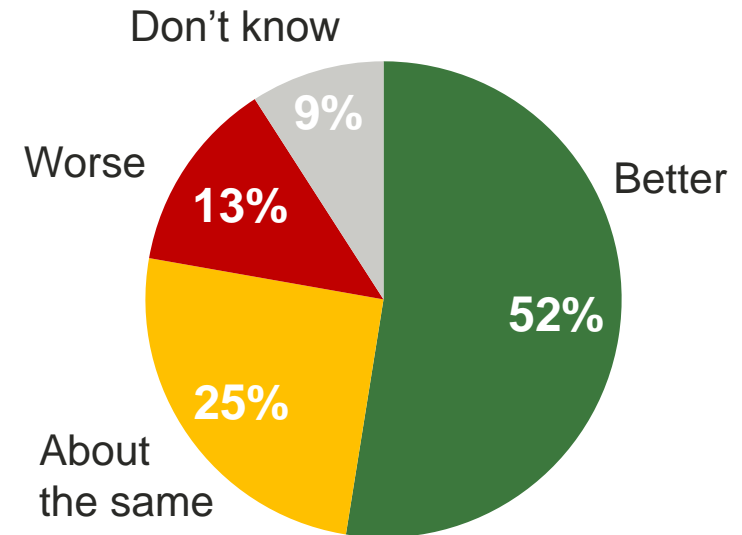


Put simply, Cumbria is a great place to live ... but a poor business location

Q21. Do you think the quality of life for residents living in Cumbria is better or worse than for people living in other regions in the UK, or is it about the same?

- 60% rate Cumbria as good as an area to live in, 77% among those who know Cumbria well/fair amount
- Half feel Cumbria offers better quality of life, 66% among those who know Cumbria well/fair amount
- The countryside/Lake District is the main draw for locating in Cumbria (19% spontaneously mention it)
- Half believe Cumbria is worse than other areas in the UK as a business location:
- One in six (16%) say it has improved as a business location, rising to 25% among those who know Cumbria well/fair amount. 44% say it has stayed the same.

Quality of life for residents



Brand Resilience

07/02/13

Brand stretch

- The Cumbrian/Lake District brand has a great deal of “stretch” – there is such positivity towards the area that it is able to withstand even severe reputational damage to its brand.
- We prompted participants with such issues as floodings, shootings, and foot and mouth, but none were felt to have the severity or longevity to have an effect on the brand.
- Few issues were felt to be severe enough to actually affect the purchase of produce, either in the short or long term.
- However, when pushed hard, participants are able to locate a ‘snapping point’ around severe radiation exposure. And it starts to ‘fray’ when contemplating the storage of nuclear waste.....
- But it was difficult for participants to project how this would affect their purchasing decisions – whether on an individual basis or across different products.
- The ‘snap’ was associated with a sudden unforeseen disaster/event, rather than activities that were planned and under control. As such the brand can accommodate activities which may appear detrimental to its inherent brand qualities without suffering any long term damage.



*“Sellafield steak
wouldn't go down as
well as Grasmere
Gingerbread”*
Newcastle, Male

*“I spend hours in the
supermarket looking at
stuff but I wouldn't
necessarily think, is that
a safe area where that's
from?”*

Female, Putney

Casualties of snap

- The Lake District brand would continue and the perception is that demand to visit the area and buy products (food, drink, tourism) would bounce back.
- However, the companies, organisations and consumer brands that service these markets may not survive the consequences of the snap event. The expectation is that others would emerge and replace them.
- Whereas associations with Cumbria and the Lake District may impact upon consumer brands in the short term, the area itself appears resilient enough to overcome almost anything.



The nuclear deterrent?

- For focus group participants, the key anxiety was **whether or not the food chain becomes contaminated**.
- And there were too many unknown unknowns around nuclear waste in general, but also around storage.
- What if the containers erode? The rock formations move? What impact will fracking have?
- However, most admitted to having trust in the judgement of professionals in the nuclear, and food safety industries – we live in a health and safety culture after all!
- Therefore, despite some concerns about the placement of nuclear energy in an area that is renowned for its purity, most felt that due diligence would ensure that no harm came to the public or consumers.

“You would hope that the manufacturers would have regulations to stop anything getting into the food chain as this would be disastrous.” **Female, Berkshire**

“I would take a lot of convincing in order to be happy about that. Further south they're doing all this fracking. Fracking sounds like a great idea. But I'm not 100% convinced about the safety of it” **Vintner, South London**

“At the end of the day, if customers are asking for a product, and we're allowed to import it, we will. For them the brand matters less than the quality and availability of the product. As long as we are able to import the product through any disaster we will.” **Importer, Canada**



Compassion fatigue

- One point that was raised in all the qualitative interviews was that, though reputational damage is possible in the event of the 'snap', it is also easy for an area to re-establish the trust that it has built up over the years.
- Sometimes this happens gradually, through a slow erosion of concern among visitors and customers.
- Even the most severe 'snaps' are not felt to be completely irreversible. Again, this is as long as the relevant authorities can reassure consumers and the wider public that a particular area and its produce is safe.
- Some members of the general public even felt that they would be more likely to buy produce from an area that is suffering in order to support the local economy.
- But there is a distinction between accidental vs. foreseeable disasters – the question remains how far does this compassion extend if the event could have been foreseen and avoided?

"It comes and goes - it's a bit of a storm in a tea cup for a week... people have very short memories on stuff like that."

Buyer, Supermarket

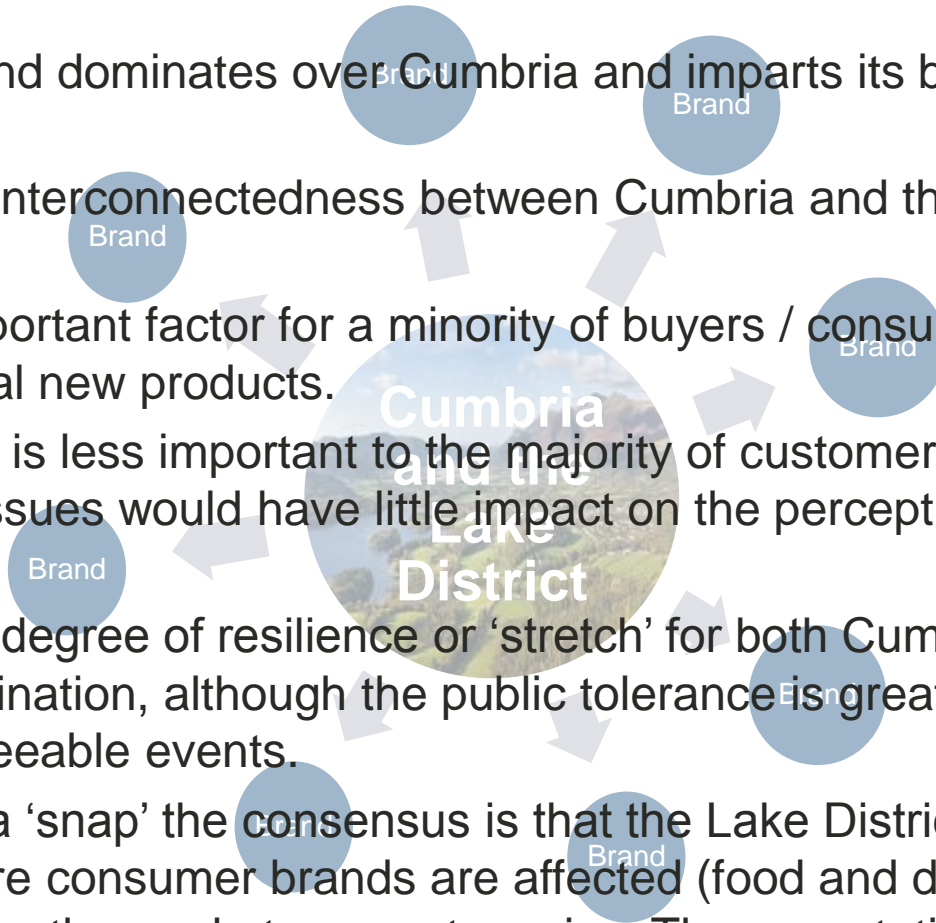


"I think people have a very short memory, and also you have this compassionate fatigue, they get tired of having a grudge against something and it just wears off."

Deli Owner, Kilburn

Conclusion – although interconnectedness does exist, both Cumbria and its products are extremely resilient

- The Lake District brand is strong with positive associations (even for negative descriptors).
- The Lake District brand dominates over Cumbria and imparts its brand values to consumer brands.
- There is a degree of interconnectedness between Cumbria and the products which are made there.
- Provenance is an important factor for a minority of buyers / consumers. But can be an encouragement to trial new products.
- Because provenance is less important to the majority of customers, most problems or negatively reported issues would have little impact on the perceptions of Cumbrian products.
- There is a significant degree of resilience or 'stretch' for both Cumbrian products and the area as a tourist destination, although the public tolerance is greater for natural disasters than manmade/foreseeable events.
- Even in the event of a 'snap' the consensus is that the Lake District brand would bounce back. However, where consumer brands are affected (food and drink or tourism) those organisations servicing the market may not survive. The expectation is that the need for product/sector would still exist, allowing other suppliers to emerge.





Thank you

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Ipsos MORI

February 2013



Appendices

UK Resident questionnaire – quantitative research

UK Resident topic guide – qualitative research

UK Business questionnaire – quantitative research

UK Business topic guide – qualitative research

Available under separate cover:

UK Resident research – topline results

UK Business research – topline results

07/02/13

Omnibus Final Questionnaire

Consumer Brands

The next questions are about some different food and drink brands.

SA PER ROW

Q1. For each of the brands I'm going to show you, please tell me which of the following statements apply to you... SHOWCARD for statements and SHOWCARD for brands. ROTATE ORDER OF BRANDS

- a) Brand 1
- b) Brand 2
- c) Brand 3
- d) Brand 4
- e) Brand 5
- f) Brand 6

I've bought this more than once in the last year

I've bought this once in the last year

I've bought this before but not in the last year

I've heard of this but I've never bought it

I've never heard of this

Don't know

SA PER ROW

Q2. How likely, or not, are you to buy (BRAND) in the future? SHOWCARD. ROTATE ORDER OF BRANDS

- a) Brand 1
- b) Brand 2
- c) Brand 3
- d) Brand 4
- e) Brand 5
- f) Brand 6

I will definitely buy it

I will probably buy it

I'm not sure

I probably won't buy it

I definitely won't buy it

Don't know

SA

Q3. How important, or not, is it to you where these brands are made?
SHOWCARD

Very important
Fairly important
Not very important
Not at all important
Don't know

ASK Q4 IF CODES 1 OR 2 (VERY OR FAIRLY IMPORTANT) AT Q3

SA PER ROW

Q4. And can you tell me where (BRAND) is made...? DO NOT PROMPT,
RECORD ANSWER TO PRE-CODES BELOW. IF SPECIFIC LOCATION IS
MENTIONED, ASK Q4A

- a) Brand 1
- b) Brand 2
- c) Brand 3
- d) Brand 4
- e) Brand 5
- f) Brand 6

Yes _____ (specific place mentioned) RECORD ANSWER; PROBE FOR
COUNTY

Yes, Cumbria / Yorkshire (just county mentioned) Note: screen will show the correct
county for the specific brand

Other (incorrect place mentioned)

No, don't know

Geographic Brands

The next questions are about different areas in the North of England.

SA PER ROW

Q5. Using the answers on the card, how often, if at all, have you visited...?
ROTATE ORDER, SHOWCARD

- a) The Lake District
- b) Cumbria
- c) West Cumbria
- d) The Yorkshire Dales

I've visited more than once in the past year

I've visited once in the past year

I've visited before but not in the last year

I've never visited

Don't know

SA PER ROW

Q6. And in the future, how likely, or not, are you to visit...? ROTATE ORDER, SHOWCARD

- a) The Lake District**
- b) Cumbria**
- c) West Cumbria**
- d) The Yorkshire Dales**

I will definitely visit
I will probably visit
I'm not sure
I probably won't visit
I definitely won't visit
Don't know

FOR EACH AREA IN TURN, IF CODE 1 OR 2 AT Q6, ASK Q6A

SA PER ROW

Q6a. And how often do you think you will visit (AREA)?

- a) The Lake District**
- b) Cumbria**
- c) West Cumbria**
- d) The Yorkshire Dales**

More than once in the next year
Once in the next year
Will visit but not/probably not in the next year
Don't know

SA

Q7. Please look at the statements on this card, which one do you think is true? SHOWCARD

Cumbria and the Lake District are exactly the same area
Cumbria is a part of the Lake District
The Lake District is a part of Cumbria
The Lake District and Cumbria are completely different areas
Don't know

MA

Q8. How do you normally hear news, if you do at all, about what is happening in Cumbria and the Lake District?

Television

Radio

Internet – news feed

Internet – search engines

Social media (e.g. Twitter, Facebook)

Friends / family

Word of mouth

Some other way (specify)

I don't hear any news about Cumbria

Don't know

MA

Q9. From this card, which, if any, of these descriptions would you use to describe ...? Please choose as many as apply SHOWCARD. ROTATE ORDER

Cumbria

The Lake District

Accessible

Aspirational

Boring

Clean

Cosmopolitan

Disappointing

Engaging

Expensive

Glamorous

Green

Indulgent

Inspiring

Nostalgic

OVERRATED

Remote

Romantic

Rustic

Safe

Special

Tacky

Tired

Trendy

Vibrant

None of these

Discussion Guide for Baseline Brand Perception Focus Groups

1. Objectives of the discussion groups:

The key objectives of the project are to:

- Consider the importance of brand image to consumer behaviour
- Understand the interconnectedness between different types of consumer brands and geographic locations
- Explore views of different geographic locations as brands in their own right
- Assess whether or not changes in the perception of geographic brands would make consumers more or less likely to buy related brands

Group discussion sections	Notes	Approx timing
1. Welcome and introductions	Sets the scene and gets background information on participants	10 mins
2. Consumer brands and understanding of brand importance	Explores what 'brands' mean to people and whether or not these have a conscious impact on consumer behaviour	20 mins
3. Interconnectedness between geographic and consumer brands	Seeks to clarify the relationship between the two different types of brands and understand the extent to which one shapes the other	15 mins
4. Geographic brands	Looks into perceptions of different geographic areas in Cumbria and the extent to which these are viewed as different	20 mins
5. Impact of negative perceptions of an area on consumer brands	Attempts to forecast what impact a negative event in a geographic area would have on related consumer brands	20 mins
6. Conclusions and summing up	Key messages from the discussion	5 mins
		Total: 1.5 hours

Group	Date and Time	Location	SEG	Type of Area	Visitor Type	Bought Brands
1	6.30 – 8:00pm Thursday 10 January	Newcastle	C2DE	Urban	Frequent	At least 3 participants must have bought 1 brand
2	6.30 – 8:00pm Tuesday 15 January	Bradford	ABC1	Rural	Frequent	At least 3 participants must have bought 1 brand
3	6.30 – 8:00pm Tuesday 8 January	Birmingham	C2DE	Urban	Infrequent	At least 3 participants must have bought 1 brand
4	6.30 – 8:00pm Tuesday 15 January	Thatcham	ABC1	Small Town	Infrequent	At least 3 participants must have bought 1 brand
5	6.30 – 8:00pm Thursday 17 January	Putney	Mixed	Urban	Non-visitor	All participants must have bought 1 brand
6	6:30 – 8:00pm Wednesday 9 January	Dunfermline	Mixed	Small Town	Non-visitor	At least 3 participants must have bought 1 brand

Key Questions	Notes	Approx timing
1. Introduction		10mins
<ul style="list-style-type: none"> <li data-bbox="240 353 877 1220"> <p>• MODERATOR INTRODUCTION:</p> <p>Thank respondents for taking part. Introduce self, Ipsos MORI (including role – independent research organisation) IF ASKED, SAY THAT IT WILL BECOME CLEAR WHO THE RESEARCH IS ON BEHALF OF, BUT THAT WE WILL KEEP IT TO OURSELVES AT THIS POINT SO AS NOT TO PREJUDICE RESPONSES. Explain aim of the discussion – we will be discussing views about different products and holiday destinations. Introduce group process - informal discussion; no right or wrong answers; all opinions are valid; interested in finding out a range of views / experiences; want to hear from everyone. Reassure respondents of confidentiality and anonymity – information will not be personally attributed. Gain permission to record for transcription purposes. Housekeeping: timing, mobiles, toilets, thank you, payment at the end.</p> <li data-bbox="240 1323 861 1496"> <p>• RESPONDENT INTRODUCTION AND BACKGROUND:</p> <p>Go round the table getting each participant to introduce themselves, where they live, and where they shop for food and drink.</p> 	<p data-bbox="906 353 1214 472">Orientates respondents and prepares them to take part in the group discussion.</p> <p data-bbox="906 483 1214 667">Outlines the 'rules' of the interview (including those we are required to tell them about under MRS and Data Protection Act guidelines)</p> <p data-bbox="906 1330 1214 1603">Warms up the respondents, helps to establish the group dynamic and gives respondents a chance to start talking about something easy. Provides useful contextual information.</p>	

2. Consumer brands		20 mins
<p>We're going to start off by talking about some different products.</p> <p>USE SHOWCARDS OF PRODUCTS</p> <p>Who has bought any of these products?</p> <p>What did you like about the products?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - Quality - Taste - Image - Historical connection to the product <p>Is there anything you dislike about the products? What was it that first made you buy the product?</p> <p>What words would you associate with each of the products?</p> <p>ASK ABOUT EACH BRAND INDIVIDUALLY. RECORD ANSWERS ON FLIPCHART</p> <p>Are there similarities between any of these products?</p> <p>Which of these products do you think has the best image?</p> <p>What do you understand by a 'brand'?</p> <p>What do you think shapes brands?</p> <ul style="list-style-type: none"> - Information about the product - Marketing / advertising - Packaging <p>How important are brands to you?</p> <p>How important do you think brands are generally to other people?</p> <p>Do brands make a difference to which products you choose to buy?</p> <p>Are you conscious of different brand images when shopping in the supermarket?</p>	<p>Gives understanding of past consumer behaviour</p> <p>Explores what 'brands' mean to people</p> <p>Assesses whether or not these have a conscious impact on consumer behaviour</p>	

<p>FLIPCHART EXERCISE</p> <p>ASK FOR DETAILS OF WHAT MAKES A SUCCESSFUL BRAND. ENCOURAGE PARTICIPANTS TO GIVE EXAMPLES OF OTHER BRANDS TO ILLUSTRATE THEIR POINTS. NOTE DOWN EXAMPLES ON FLIPCHART AND MARK THE RESPONSES WHICH ARE MENTIONED MOST FREQUENTLY OR HAVE THE MOST AGREEMENT FROM THE GROUP.</p> <p>What do you think makes a ‘good brand’?</p> <p>PROBE – sales vs. image</p> <p>Are there some characteristics that are common to all successful brands?</p> <p>Can you give me any examples of successful brands?</p> <p>What is it that you like about them?</p>		
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3. Interconnectedness between geographic and consumer brands		15 mins
<p>In the next section, we're going to talk about the link between brands and the area they are made.</p> <p>Do you know whereabouts these products are made?</p> <ul style="list-style-type: none">- ALLOW PARTICIPANTS TO SUGGEST OPTIONS FOR ALL BRANDS BEFORE REVEALING THE AREA THEY ARE MADE- IF TOWNS / AREAS ARE SUGGESTED (KENDAL, HAWKSHEAD, WENSLEYDALE ETC.), PROBE FOR THE COUNTY/AREA THESE TOWNS ARE IN <p>Was the manufacturing location important to you when buying the products?</p> <p>IF NO, PROBE FOR WHY IT MAKES NO DIFFERENCE</p> <p>IF YES, PROBE FOR WHY THE LOCATION IS IMPORTANT</p> <p>Does the fact that they are from Cumbria (or Yorkshire) make you any more or less likely to buy them?</p> <p>Would it matter to you if the products were made somewhere else?</p> <p>Do the product brands overlap with your views of the area in which they are made?</p> <p>Why do you think this is?</p> <p>If there are similarities between your views of these products and the areas they are made...</p> <p>Do you think that tells us anything?</p> <ul style="list-style-type: none">- Is it coincidental?- Does one brand influence the other? <p>Is there a link between brand images and your views of the area they were made?</p> <ul style="list-style-type: none">- If there is, which way round do you think it works?- Does the area shape your view of a product?- Can a product shape your view of the area?	<p>Explores awareness of brand's location</p> <p>Seeks to clarify the relationship between the two different types of brands</p> <p>Aims to understand the extent to which one shapes the other</p>	

<p>If your view of the area changed, would this have any impact on your perception of the brands?</p> <p>Does the degree of overlap between the two brands make any difference to how much your views of the products would be affected?</p> <p>Would it make a difference if you discovered one of the products was from somewhere that you had a negative impression of?</p> <p>PROBE - Would you still buy the product but not as frequently? Would you buy it at all?</p>		
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<p>Are there any similarities between the two areas?</p> <p>If you had to pick out 3-5 words that summed up each, which ones would you choose?</p> <p>What are the key differences between your perceptions of 'Cumbria' and 'The Lake District'?</p> <p>Who has visited these places?</p> <p>How often do you visit generally?</p> <p>What were the main reasons that you chose to visit?</p> <p>How often are you likely to visit in the future?</p> <p>Is there anything that you can find in Cumbria / the Lake District that is unique?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - Relate back to consumer brands - e.g. Can you get that product elsewhere? <p>Has anyone visited West Cumbria / the Cumbrian coast?</p> <p>Is it different from Cumbria?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - In what ways? - How much? <p>What words come to mind when you think of West Cumbria / the Cumbrian coast?</p>	<p>Considers past and future tourist behaviour which provides useful contextual information</p>	
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5. Impact of negative perceptions of the area on consumer brands		20 mins
<p>Earlier in the discussion, we talked about consumer brands, geographic brands and the level of interconnectedness between the two.</p> <p>The final topic we want to consider is about how changes in your view of an area may impact on your views of either the other two areas we have discussed or any related products.</p> <p>Firstly, if something negative happened in either area, do you think it would impact upon your view of the other?</p> <ul style="list-style-type: none"> - Is this linked to your views about how much the two areas overlap? - If it would change your opinion, why do you think that is? <p>What sort of negative events would affect your views about the areas?</p> <p>IF NECESSARY, PROVIDE EXAMPLE OF ASH DISEASE IN PARTS OF CUMBRIA</p> <p>Would your view of the Lake District change?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - How would it change? - Why do you think this is? <p>Would you be any less likely to visit the Lake District?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - Why do you think this is? - Is it purely to do with geographic proximity? - Or does it affect the brand image of the Lake District? <p>Would other events that occur in one area be any less likely to make you visit the other?</p> <p>ONLY PROVIDE EXAMPLES IF NECESSARY</p> <ul style="list-style-type: none"> - Foot-and-mouth disease - Flooding - Shootings <p>Would these events change the words you would associate with each area?</p>	<p>Assesses impact of changed perceptions of one area on the other two areas discussed</p> <p>Make clear that in this example and we want to know how such things might change their views rather than reactions to an actual event.</p>	

<p>Would all these types of events have the same impact on your views?</p> <p>PROBE IF NO:</p> <ul style="list-style-type: none"> - How would the impact be different? - Are there different levels of impact? <p>Finally, bearing in mind what we discussed earlier about the links between geographic areas and consumer brands...</p> <p>Earlier we briefly talked about whether or not your attitude towards brands could be affected by a change in perception of the area they were made.</p> <p>Do you think you would be any less likely to buy products if your view of the area they were from changes?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - Why do you think this is? - Would you still buy the product but not as frequently? Would you buy it at all? <p>If the events we've just talked about happened...</p> <p>Would your view of these products change?</p> <p>Do you think you would be any less likely to buy these products?</p> <ul style="list-style-type: none"> - Why do you think this is? - What is that would change your opinion of the products - Would you make the link between the product and the area? - How would this make you any less likely to buy the products? <p>PROBE AMONGST THOSE THAT SAID WHERE PRODUCT WAS MADE IMPACTS ON PURCHASING DECISION:</p> <ul style="list-style-type: none"> - Does this mean you would be less likely to buy products if your perceptions of the area went downhill? <p>PROBE AMONGST THOSE THAT SAID QUALITY OF THE PRODUCT WAS PARAMOUNT:</p> <ul style="list-style-type: none"> - Does this mean you would be equally like to buy these products in the future? 	<p>Attempts to forecast what impact a negative event in an area would have on related consumer brands</p> <p>If Ash disease or Foot-and-mouth disease is discussed, make it clear that the safety of the brands discussed here would not be affected.</p>	
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<p>PROBE FOR FINAL THOUGHTS</p> <p>If you would be less likely to buy the product after negative events, why do you think this is?</p> <p>What impact would a negative perception of an area have on your view of products that are made there?</p>	<p>Explain what it is that drives this change in perceptions of consumer brands</p>	
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5. Conclusions		5 mins
<p>What is the key message from our discussion today?</p> <p>What difference does the provenance of a product (where it comes from) make to whether or not you decide to buy it?</p> <p>IF NECESSARY:</p> <ul style="list-style-type: none"> - Our client for this research is the Cumbria Brand Management Group, a consortium of local councils and stakeholders who are interested in the general public's current perception of Cumbria and the Lake District. <p>Reassure anonymity, thanks and hand out incentives.</p>		

CUMBRIA BASELINE BRAND SURVEY

UK BUSINESS QUANTITATIVE QUESTIONNAIRE FINAL 14/12/12

Good morning/afternoon. This survey asks about what is important to you when looking at where to base your business and what makes somewhere a good place to operate from. We would appreciate you taking the time to complete this interview, which will take approximately 15 minutes. Your answers and comments will be treated in total confidence and cannot be traced back to you in any way.

S1. Are you involved in decisions about where your company operates from?

Yes – CONTINUE

No – CLOSE INTERVIEW

FACTORS IN ATTRACTING BUSINESSES

Q1. Below are some specific business location factors. On a scale of 1 to 10, where 1 is not at all important and 10 is extremely important, how important or not do you think the following factors are in helping to attract businesses to an area? SINGLE CODE FOR EACH STATEMENT. ROTATE ORDER OF STATEMENTS

- a. Availability of affordable office space/premises
- b. High quality work environment
- c. Availability of a skilled workforce
- d. Availability of graduates
- e. Accessibility and transport links
- f. Proximity to customers
- g. Proximity to suppliers
- h. Broadband connectivity
- i. Availability of financial business support and business advice
- j. Accessibility to leisure and cultural facilities
- k. Affordable cost of living
- l. Good housing quality
- m. Proximity to the countryside
- n. Local heritage and tradition
- o. The image of the area
- p. Good quality local schools
- q. Strength of the local economy
- r. Good quality healthcare
- s. Spouse/partner career opportunity

1 – Not at all important

2

3

4

5

6

7

8

9

10 – Extremely important

Don't know

SOURCES OF INFORMATION

Q2. If you were considering relocating or expanding your business with a new operations site what information would you want to know to make your decision on where to relocate or expand to?
OPEN QUESTION, WRITE IN COMMENTS

Q3. Where would you go to get this information? Please select all you think apply. MULTICODE ALLOWED. ROTATE ORDER OF STATEMENTS

Chambers of commerce
Local authorities/local government
Local Enterprise Partnerships
Local development/inward investment agencies
Tourist Boards
The Internet (WRITE IN WEBSITE TYPES)
Specialist relocation experts
Industry peers
Friends and family
Central government departments, eg UKTI
Embassies
Trade shows
The media (WRITE IN)
Other (WRITE IN)
Don't know

Q4. Which one or two of the following do you think would be most effective in providing this type of information? MULTICODE ALLOWED. ROTATE ORDER OF STATEMENTS

Websites
Email newsletters
Events/conferences
Articles in trade publications
Articles in media (newspapers & TV)
Case studies
Face to face meetings
In-depth reports
Summary reports with key information
Short leaflets
DVD/Film footage
Publications (eg. Magazines)
Other (WRITE IN)
Don't know

THE NORTHWEST OVERALL

Q5. As you may know, England is divided into several regions for the purposes of administration of government services, one of which is Northwest England. Which counties do you think are in Northwest England.

OPEN QUESTION, WRITE IN COMMENTS

Q6. There are five counties in Northwest England. For each of the counties below please tick the option to show how well, or not, you know the county.

SINGLE CODE FOR EACH COUNTY. ROTATE ORDER OF COUNTIES

- a. Cheshire (including Chester)
- b. Cumbria
- c. Greater Manchester
- d. Merseyside (including Liverpool)
- e. Lancashire

I know it very well

I know a fair amount about it

I know just a little about it

I've heard of it but know nothing

I've never heard of it

Don't know

ASK ALL THOSE WHO KNOW OR HAVE HEARD ABOUT EACH COUNTY AT Q6 (CODES 1-4)

Q7. Taking into account any of the things you think are important, is your overall opinion and impression of each county favourable or unfavourable?

SINGLE CODE FOR EACH COUNTY. ROTATE ORDER OF COUNTIES

- a. Cheshire (including Chester)
- b. Cumbria
- c. Greater Manchester
- d. Merseyside (including Liverpool)
- e. Lancashire

Very favourable

Fairly favourable

Neither favourable nor unfavourable

Fairly unfavourable

Very unfavourable

Don't know

Q8. Overall, how would you rate England's Northwest as a business location? SINGLE CODE

Very good

Fairly good

Neither good nor poor

Fairly poor

Very poor

Don't know

CUMBRIA AS A BUSINESS LOCATION

Q9. Thinking specifically about Cumbria now. Do you think that Cumbria is better or worse than other areas in the UK as a business location, or is it about the same? SINGLE CODE

- Much better
- A little better
- About the same
- A little worse
- Much worse
- Don't know

Q10. Earlier we asked how important you feel specific factors are in helping to attract businesses to an area. To what extent do you feel that Cumbria provides these factors? SINGLE CODE FOR EACH STATEMENT. ROTATE ORDER OF STATEMENTS

- t. **Availability of affordable office space/premises**
 - a. **High quality work environment**
 - b. **Availability of a skilled workforce**
 - c. **Availability of graduates**
 - d. **Accessibility and transport links**
 - e. **Proximity to customers**
 - f. **Proximity to suppliers**
 - g. **Broadband connectivity**
 - h. **Availability of financial business support and business advice**
 - i. **Accessibility to leisure and cultural facilities**
 - j. **Affordable cost of living**
 - k. **Good housing quality**
 - l. **Proximity to the countryside**
 - m. **Local heritage and tradition**
 - n. **The image of the area**
 - o. **Good quality local schools**
 - p. **Strength of the local economy**
 - q. **Good quality healthcare**
 - r. **Spouse/partner career opportunity**

- 1 – Cumbria does not provide it at all
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10- Cumbria provides it completely
- Don't know

Q11. Aside from economic factors and financial incentives, what things do you think would make businesses consider relocating or moving to Cumbria?
OPEN QUESTION, WRITE IN COMMENTS

Q12. Which industry sectors, if any, would you associate with Cumbria? Please select all you think apply. MULTICODE ALLOWED

Aerospace and aviation
Biotechnology
Business and Professional Services
Chemicals
Construction/building technologies
Creative industries/media
Defence technology/engineering
Digital Industries
Energy
Environmental/ecotechnologies
Food and drink
Manufacturing
Maritime
Mining & quarrying
Pharmaceuticals/ Medical Devices
Sport
Textiles and paper
Tourism
Other (WRITE IN)
None SINGLE CODE ONLY
Don't know SINGLE CODE ONLY

Q13. How good or poor you would say Cumbria is for providing the following ...? SINGLE CODE FOR EACH STATEMENT

- a. A location for inward investment**
- b. The necessary skillbase for your industry**
- c. Competitive operating costs**
- d. An image to enhance your brand reputation**
- e. Availability of sites and premises**

Very good
Fairly good
Neither good nor poor
Fairly poor
Very poor
Don't know

Q14. Over the last two years, do you think Cumbria has improved as a place to do business, got worse or stayed the same? SINGLE CODE

Improved
Stayed the same
Got worse
Don't know

CUMBRIA'S ECONOMIC OUTLOOK

TO AVOID ORDER BIAS, Q15 TO Q17 TO BE REVERVSED FOR HALF THE SAMPLE

Q15. Compared to other areas in Great Britain, do you think Cumbria is better or worse equipped to cope with the current economic downturn, or is it about the same? SINGLE CODE

Much better
A little better
About the same
A little worse
Much worse
Don't know

Q16. Do you think that the general economic condition of Cumbria will improve, stay the same, or get worse over the next 12 months? SINGLE CODE

Improve
Stay the same
Get worse
Don't know

Q17. And do you think that the general economic condition of the country in general will improve, stay the same, or get worse over the next 12 months? SINGLE CODE

Improve
Stay the same
Get worse
Don't know

GENERAL PERCEPTIONS OF CUMBRIA

Q18. Thinking more generally about Cumbria, from the list below, which, if any, of these descriptions would you use to describe Cumbria? Please choose as many as apply MULTICODE ALLOWED. ROTATE ORDER

Accessible
Aspirational
Boring
Clean
Cosmopolitan
Disappointing
Engaging
Expensive
Glamorous
Green
Indulgent
Inspiring
Nostalgic
Overrated
Romantic
Remote
Rustic
Safe
Special
Tacky
Tired
Trendy
Vibrant
None of these

Q19. Below are some statements about Cumbria. How much do you agree or disagree with each statement? SINGLE CODE EACH STATEMENT. ROTATE ORDER OF STATEMENTS

- a. **Cumbria has an image that does not reflect the reality of the region**
- b. **Cumbria is too diverse to be promoted as a single area**
- c. **Cumbria is a good place for visitors**
- d. **Cumbria is a good place to take holidays in**
- e. **Cumbria is a good place to base a business**

Strongly agree

Tend to agree

Neither agree nor disagree

Tend to disagree

Strongly disagree

Don't know/no opinion

Q20. Overall, how would you rate Cumbria as an area to live in? SINGLE CODE

Very good

Fairly good

Neither good nor poor

Fairly poor

Very poor

Don't know

Q21. Do you think the quality of life for residents living in Cumbria is better or worse than for people living in other regions in the UK, or is it about the same? SINGLE CODE

Much better

A little better

About the same

A little worse

Much worse

Don't know

CLASSIFICATION QUESTIONS

And now, please could you tell me some details about your company. This information will be used for analysis only.

Q22. Approximately, how many employees work for your company?

1-50

51-250

251-999

1,000+

Refused (NOT SHOWN ON SCREEN)

Q23. And approximately what is your annual turnover?

Up to £250,000
£250,000-500,000
£500,000-750,000
£750,000-1m
1m-1.25m
1.25m-1.5m
1.5m-1.75m
1.75m-2m
Up to £2m
£2-£5m
Over £5m-£25m
Over £25m-£50m
Over £50m
Refused (NOT SHOWN ON SCREEN)

Q24. Which industry sector best describes your main area of business?

Chemicals
Textiles
Aerospace
Mechanical/Other engineering
Energy
Automotive
Food & drink
Environmental technologies
Life sciences
Medical equipment and technology
Financial and professional services
Tourism
Computer software/internet –based services
Media/advertising/public relations
Other

Q25. How many sites does your business operate from?

WRITE IN NUMBER

Q26. In which regions are your operations based? MULTICODE ALLOWED

London
East of England
East Midlands
West Midlands
Yorkshire & Humberside
North East
North West
South East
South West
Wales
Scotland

Q27. We may wish to conduct further research about perceptions of Cumbria as a place to do business. Are you willing to be recontacted by Ipsos MORI or Cumbria Chamber of Commerce in the next 2 years to take part in such research?

Yes (GATHER EMAIL AND TELEPHONE CONTACT DETAILS)
No

Discussion Guide for Baseline Brand Perception Depth Interviews

1. Objectives of the interviews:

The key objectives of the project are to explore:

- What it is that attracts these buyers of branded food and drink products when they are sourcing new products;
- How they promote new products to their own customers;
- Perceptions of Cumbria;
- Whether provenance/the geographic brand adds anything to the consumer brand;
- Their reactions to brands should negative stories about the region emerge.

Group discussion sections	Notes	Approx timing
1. Welcome and introductions	Sets the scene and gets background information on participants	3 mins
2. Perceptions and importance of brands	Explores what 'brands' mean to participants and whether or not these have a conscious impact on buying / selling behaviour	10 mins
3. Provenance and its importance	Uncovers the importance of provenance to buyers when making decisions about buying products	10 mins
4. Cumbria and the Lake District	Considers geographic and consumer brands from Cumbria	5 mins
5. Impact of negative perceptions of an area on consumer brands	Attempts to forecast what impact a negative event in a geographic area would have on related consumer brands	10 mins
6. Conclusions and summing up	Key messages from the discussion	2 mins
		Total: 40 minutes

Type of Business	Number of interviews
Small, independent retailers	8
Large supermarkets and distributors	3
Organisations which import / distribute UK products overseas	4
Tourism Operators	4

Key Questions	Notes	Approx timing
1. Introduction		5 mins
<ul style="list-style-type: none"> • MODERATOR INTRODUCTION: Thank participant for taking part. Introduce self, Ipsos MORI (including role – independent research organisation) IF ASKED, SAY THAT IT WILL BECOME CLEAR WHO THE RESEARCH IS ON BEHALF OF, BUT THAT WE WILL KEEP IT TO OURSELVES AT THIS POINT SO AS NOT TO PREJUDICE RESPONSES. Explain aim of the interview – we will be discussing views about different products and the areas where they are made. Reassure participant of confidentiality and anonymity – information will not be personally attributed. Gain permission to record for transcription purposes. NOTE PARTICIPANT DETAILS: <ul style="list-style-type: none"> - Type of organisation - The market they are in - Their role in the organisation - Experience in the industry 	<p>Orientates participant and prepares them for the interview.</p> <p>Outlines the ‘rules’ of the interview (including those we are required to tell participants about under MRS and Data Protection Act guidelines)</p>	

2. Perceptions and importance of brands		10 mins
<p>We're going to start off by talking about some different products and how you decide what to stock / promote.</p> <p>What is most likely to attract you to a brand / product?</p> <p>How do you find out about brands?</p> <p>What do you think shapes a product's brand?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - Information about the product? - Marketing / advertising? - Packaging? <p>How important are brands to you?</p> <p>How important do you think brands are generally to customers?</p> <p>Do brands make a difference to which products you choose to buy?</p> <p>What do you think makes a 'good brand'?</p> <p>PROBE – sales vs. image</p> <p>Are there some characteristics that are common to all successful brands?</p>	<p>Explores buying decisions</p> <p>Explores what 'brands' mean to participant</p>	

3. Provenance and its importance (not for tourism organisations)		10 mins
<p>In the next section, we're going to talk about the link between brands and the area they are made.</p> <p>Do you know whereabouts the products you sell / promote are made?</p> <p>Was the manufacturing location important to you when buying / promoting the products?</p> <p>IF NO, PROBE FOR WHY IT MAKES NO DIFFERENCE</p> <p>IF YES, PROBE FOR WHY THE LOCATION IS IMPORTANT</p> <p>Would it matter to you if the products were made somewhere else?</p> <p>Do the product brands overlap with your views of the area in which they are made?</p> <p>Why do you think this is?</p> <p>Would it make a difference if you discovered one of the products was from somewhere that you had a negative impression of?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - Would you still buy the product but not as frequently? - Would you buy it at all? <p>When you are selling products, how much emphasis do you place on provenance?</p> <p>USE SHOWCARDS OF PRODUCTS</p> <p>Have you bought any of these products for your business?</p> <p>IF YES: What did you like about the products?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - Quality - Taste - Image - Historical connection to the product <p>Is there anything you dislike about the products?</p>	<p>Explores awareness of area in which products are made</p> <p>Considers importance of area in which products are made</p> <p>Explores awareness of Cumbrian products</p>	

<p>What was it that first attracted you to the product?</p> <p>ASK ALL</p> <p>Does the fact that they are from Cumbria (or Yorkshire) make you any more or less likely to buy/promote them?</p> <p>If there are similarities between your views of these products and the areas they are made...</p> <p>Do you think that tells us anything?</p> <ul style="list-style-type: none"> - Is it coincidental? - Does one brand influence the other? <p>Is there a link between brand images and your views of the area they were made?</p> <ul style="list-style-type: none"> - If there is, which way round do you think it works? - Does the area shape your view of a product? - Can a product shape your view of the area? <p>If your view of the area changed, would this have any impact on your perception of the brands?</p> <p>Does the degree of overlap between the two brands make any difference to how much your views of the products would be affected?</p>	<p>Seeks to clarify the relationship between the two different types of brands</p> <p>Aims to understand the extent to which one shapes the other</p>	
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4. Cumbria and the Lake District		5 mins
<p>TOURISM ORGANISATIONS ONLY</p> <p>Which regions and areas within the UK are most attractive to your market?</p> <p>What is it that makes these areas attractive to your market?</p> <p>How do Cumbria and the Lake District compare to the other regions and areas of the UK? Are they easier/harder to promote?</p> <p>Could/do these elements exist in other areas?</p> <p>How does the average consumer in your market view Cumbria and the Lake District?</p>	<p>Seeks to establish relative perceptions of Cumbria/Lake District</p>	<p>5 minutes</p>
<p>We're now going to talk about your views of Cumbria and the Lake District.</p> <p>Are there any geographic differences between these two areas?</p> <ul style="list-style-type: none"> - Are they the same to you? - Is there any overlap? - Are they two distinct and separate places? <p>If the Lake District and Cumbria were viewed as a brand, what words or images would you associate with them?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - What sort of personality would they have? - How do they make you feel? - What would their slogan / catchphrase be? <p>Are there any similarities between the two areas?</p> <p>What are the key differences between the two areas?</p> <p>Is there anything that you can find in Cumbria or the Lake District that is unique?</p>	<p>Looks into perceptions of different geographic areas in Cumbria and the extent to which these are viewed as different</p> <p>Probe for intangibles rather than wet, rainy, mountainous etc.</p>	

5. Impact of negative perceptions of the area on consumer brands		10 mins
<p>The final topic we want to consider is about how changes in your view of an area may impact on your views of either similar areas or any related products.</p> <p>Firstly, if something negative happened in either area, do you think it would impact upon your view of the other?</p> <ul style="list-style-type: none"> - Is this linked to your views about how much the two areas overlap? - If it would change your opinion, why do you think that is? <p>What sort of negative events would affect your views about the areas?</p> <p>IF NECESSARY, PROVIDE EXAMPLE OF ASH DISEASE IN PARTS OF CUMBRIA</p> <p>Would your view of the Lake District change?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - How would it change? - Why do you think this is? <p>Would other events that occur in one area be any less likely to make you visit the other?</p> <p>ONLY PROVIDE EXAMPLES IF NECESSARY</p> <ul style="list-style-type: none"> - Foot-and-mouth disease - Flooding - Shootings <p>Would these events change the words you would associate with each area?</p> <p>Would all these types of events have the same impact on your views?</p> <p>PROBE IF NO:</p> <ul style="list-style-type: none"> - How would the impact be different? - Are there different levels of impact? <p>Finally, bearing in mind what we discussed earlier about the links between geographic areas and consumer brands...</p> <p>Do you think you would be any less likely to buy or sell products for your business if your view of the area they were from changed?</p>	<p>Assesses impact of changed perceptions of one area on the other two areas discussed</p> <p>Make clear that in this example and we want to know how such things might change their views rather than reactions to an actual event.</p> <p>Attempts to forecast what impact a negative event in an area would have on related consumer brands</p> <p>If Ash disease or Foot-and-mouth disease is discussed, make it clear that the safety of the brands discussed here would not be affected.</p>	

<p>PROBE:</p> <ul style="list-style-type: none"> - Why do you think this is? - Would you still buy the products but not as frequently? Would you buy them at all? <p>If the events we've just talked about happened...</p> <p>Would your view of these products change?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - Why do you think this is? - Would you make the link between the product and the area? - How would this make you any less likely to buy the products? <p>PROBE WHERE PARTICIPANT SUGGESTS WHERE PRODUCT WAS MADE IMPACTS ON PURCHASING DECISION:</p> <ul style="list-style-type: none"> - Does this mean you would be less likely to buy products if your perceptions of the area went downhill? <p>PROBE WHERE PARTICIPANT SUGGESTS THAT QUALITY OF THE PRODUCT IS PARAMOUNT:</p> <ul style="list-style-type: none"> - Does this mean you would be equally likely to buy these products in the future? <p>Would your promoting / selling of these products change?</p> <p>PROBE FOR FINAL THOUGHTS</p> <p>If you would be less likely to buy/promote the product after negative events, why do you think this is?</p> <p>What impact would a negative perception of an area have on your view of products that are made there?</p>	<p>Explain what it is that drives this change in perceptions of consumer brands</p>	
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6. Conclusions		5 mins
<p>What is the key message from our discussion today?</p> <p>What difference does the provenance of a product (where it comes from) make to whether or not you decide to buy it?</p> <p>IF NECESSARY:</p> <ul style="list-style-type: none">- Our client for this research is the Cumbria Brand Management Group, a consortium of local councils and stakeholders who are interested in current perceptions of Cumbria and the Lake District. <p>Reassure anonymity, thanks and hand out incentive.</p>		