

**100,000 Shoppers Can't Be Wrong: Signage Communication Evidence from The BrandSpark / Better Homes and Gardens American Shopper Study**

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Overview

The BrandSpark / Better Homes and Gardens American Shopper Study™ is performed annually by leading independent market research firm BrandSpark International in conjunction with the Better Homes and Gardens Best New Product Awards program. The sample for this survey includes 100,218 North American households, including 63,664 US consumers ages 18 to 65+. The US sample is stratified by gender, age, and Census region, weighted to conform to US MRI principal shopper data. Insights from this consumer panel representing households in all 50 states are mined in collaboration with academic partners from the University of Cincinnati, Lindner College of Business.

The most recent survey included several items of interest to the signage industry and planners, including some of the critical issues identified in the charette sessions at the 2010 NSREC conference.

Survey items regarding the economic value of signage to business and consumers include (1) the effect of signage quality on driving traffic into stores, (2) shoppers' use of signage as inferential cues for drawing quality inferences about stores, and (3) the perceived usefulness of outdoor and indoor signage (versus other media) vis-à-vis finding out about new products. The survey documents the proportion of consumers who have driven by and failed to find a business because the signage was too small or unclear, as well as characteristics of consumers who have experienced such visual communication failures.

Across genders, age groups, and regions, 29% of American consumers report that they have been drawn into unfamiliar stores based on the quality of the store's signage. The 18-24 year old age group is most prone to this effect, with over half reporting being drawn into an unfamiliar store on the basis of signage. Some regional differences were also observed, with consumers in western states being slightly more prone to this effect.

Over a third of American consumers (34.5%) report that they have made quality assumptions about a business on the basis of clear and attractive signage. No gender or regional differences were observed, but consumers in the 18-24 age group appear to be more prone to drawing quality inferences on the basis of signage quality. The “impressionable years hypothesis” (Krosnick & Alwin 1989) and thin-slice judgment theory (Kardes 2006) may help explain this pattern. Whereas younger shoppers have less experience upon which to draw, they are more reliant on heuristic cues to make judgments.

The survey also explored an important visual acuity issue: driving by and failing to find a business because its signage was too small or unclear. This appears to be a major problem, as 49.7% of American consumers report that this has happened to them. Although the problem is universal across genders and regions, it varies across age groups. Surprisingly, this is not a “senior citizen” phenomenon, as both younger and older age groups report more signage communication failure than the middle (35-49, 50-64) age groups. In fact, 64% of females aged 18-24 report having driven by and failed to find a business due to small, unclear signage.

How does signage compare with other communication media in terms of perceived usefulness as a source of information about new products? The survey asked respondents to rate the perceived usefulness of various media, including television, radio, newspapers, etc. Although television was rated as the most useful source of new product information, indoor signage ties with magazines as the second most useful source, and outdoor signage ranked third, beating out radio, internet, and newspaper ads.

Effective signage communication is a joint product of both the signage and the viewer. Hence the survey explored how reactions to signage varies across consumer characterized by psychographic profiles. Survey items allowed us to classify respondents into low versus high environmental consciousness, low vs. high health consciousness, and interdependent vs. independent self-construal segments.

The high environmentally conscious group was found to perceive outdoor signage as more useful, to be more likely to be drawn into stores on the basis of signage, and to be more likely to make quality inferences on the basis of signage. We speculate that their information drawn from the environment. Hence, ironically, although highly environmentally conscious individuals may not “like” outdoor signage, they find it more useful than do less environmentally conscious individuals.

Health conscious consumers show a similar pattern of perceiving signage as more useful and beckoning. We speculate that health conscious individuals may be more message prone. That is, they are more likely to seek out and use information than are less health conscious individuals, who habitually ignore potentially beneficial information.

Consumers can be characterized in terms of self-construal, which is how they view themselves in relation to others. People with an independent self-construal are individualists and prefer to be known as an individual rather than as a member of a group. People with an interdependent self-construal, by contrast, tend to view themselves in relation to others, as part of a group. How consumers view themselves can have profound and far-reaching effects on perception and judgment. For that reason, we classified consumers into predominantly interdependent vs. predominantly independent groups and compared their responses to the signage questions. Consumers with predominantly interdependent self-construal were found to perceive signage as more useful, to be more likely to be drawn into stores on the basis of signage, and to be more likely to make quality inferences on the basis of signage. We believe this may be due to their orientation to the external world. Interdependents have a greater tendency to look outside themselves for information and guidance. Hence they are more prone to signage effects. Interestingly, because each of us is a composite of many “selves,” an interdependent self-construal can be evoked, at least temporarily, even among those with an independent self-construal. Relatively subtle cues, such as showing an image of a family or group of people rather than an individual, can evoke an interdependent mind-set that may amplify the beneficial effects of signage.

The presentation concludes with a discussion of future research.

Further Evidence from the BrandSpark / *Better Homes and Gardens* American Shopper Study™:  
A Longitudinal Update and Extension

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# The BrandSpark / *Better Homes and Gardens* American Shopper Study™

- Annual survey by BrandSpark International, a leading independent market research firm, conducted in conjunction with the *Better Homes and Gardens* Best New Products Awards program.
- Insights from a consumer panel representing households in all 50 states are mined by BrandSpark in collaboration with academic partners in UC's Lindner College of Business.

# THE 2011 SURVEY

Established that:

- Signs draw traffic to businesses
- Consumers infer quality from signage
- Signage trumps radio, internet, newspapers
- About half of the population has driven by and failed to find a business due to signage communication failure

# THE 2012 SURVEY

- Longitudinal update of 2011 survey.
- Added new items concerning:
  - Signage communication
  - Aesthetics of signage

# SAMPLE

- US “mini survey” conducted as supplement to the annual BrandSpark/Better Homes & Gardens American Shopper Survey
- Sent to panel of >7,000 US consumers, ages 18+, in all 50 states
- Stratified sample ( $N = 784$ ), weighted to conform to US MRI data and reflect the principal shopper
  - Gender
  - Age
  - Census region

# Part I: Longitudinal Findings -1-

“I have been drawn into unfamiliar stores based on the quality of their signs.”

- 2011 = 29% yes                      2012 = 35.8% yes

# Longitudinal Findings -2-

“I have made quality assumptions based on a store having clear and attractive signage.”

- 2011 = 34.5% yes                      2012 = 41.5% yes

# Longitudinal Findings -3-

“I have driven by and failed to find a business because the signage was too small or unclear.”

- 2011 = 49.7% yes                      2012 = 60.8% yes

# To whom has this happened?

Characteristics of shoppers who have driven by and failed to find a business due to sign communication failure:

- Women (64.5%) more prone than men (52.8%)
- Positively associated with education level
- Affects all age groups – not a “senior” problem
- Higher SSC (sensitivity to signage)

# Part II: Signage Communication

“One of the first things I notice about a new or unfamiliar business is the signage outside its building.”

- 75.2% agree      20.4% neutral      4.5% disagree

# Signage Communication -2-

“In addition to identifying a business, signs can convey the personality or character of the business.”

- 85.7% agree      11.9% neutral      2.4% disagree

# Signage Communication -3-

“The letters on signs should be large enough for passing motorists to read at a glance.”

- 90.9% agree      8.4% neutral      0.7% disagree

# Signage Communication -4-

“I get frustrated and annoyed when signs are too small to read.”

- 81.5% agree      13.7% neutral      4.8% disagree

# Summary of Communication Findings

## Signage...

- drives traffic
- creates first impressions
- implies quality
- conveys personality
- must be easily legible
- can cause loss of business and consumer frustration when it is too small / illegible

# Signage Aesthetics -1-

“I prefer signage that uses symbols or icons rather than words.”

- 12.7% agree      51.7% neutral      35.6% disagree

# Signage Aesthetics -2-

“I prefer signs that use a combination of words and non-verbal symbols or icons.”

- 47.9% agree      44.2% neutral      7.9% disagree

# Signage Aesthetics -3-

“Smaller signs are generally more attractive than larger signs.”

- 13.5% agree      52.1% neutral      34.3% disagree

# Signage Aesthetics -4-

“Variety of signage design within a business district is interesting and appealing.”

- 62.7% agree      30.1% neutral      7.2% disagree

# Signage Aesthetics -5-

“Uniformity of signage within a business district looks attractive, but makes businesses harder to identify at a glance.”

- 58.0% agree      31.5% neutral      10.5% disagree

# Signage Aesthetics -6-

“Vintage signs are worth preserving due to their historic and cultural value.”

- 77.1% agree      18.9% neutral      4.0% disagree

# Summary of Aesthetics Findings

- Most consumers prefer variety over uniformity of signage.
- Only 1/8<sup>th</sup> of the population prefers non-verbal signs. Almost 3 times as many do not.
- Smaller signs are not perceived as *per se* more attractive than larger signs.
- Consumers demand legibility.
- A large majority of consumers believes vintage signs are worth preserving.

# What does this all mean for planners and regulators?

- Objective research evidence to make informed decisions vs. reliance on rhetorical opinion/theory/customary practice.
- Sign regulators can emulate such research in their own communities to gauge local opinion.
- Sign regulators need to be given access to such research at neutral times, not just when a new sign code is being written, or when a permit application is being made.
- Sign regulators who appreciate such information can help spread the word by telling local/national organizations/publications about the findings.
- Mitigating drive-by failures through size & placement.
- Small/uniform  $\neq$  aesthetically pleasing.

# What does this all mean for those who design signs?

- Consider consumers' communication preferences
- Balance of verbal/non-verbal content
- Legibility *über alles*
- Target audience differences
- Using design to mitigate drive-by failures

# What does this all mean for the signage industry?

- Objective basis for making product claims
- Customer education
- Dissemination of information
  - Company web sites and brochures
  - Trade publications
  - Associations

# Challenges for future research

- What vs. why & how
- Designing signage to overcome drive-by failures
- Responses to verbal vs. pictorial content

# Thank you!

