

Viewing Signs Through the Eyes of the Beholders: Perceptual Evidence from the American Grocery Shopper Survey

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National Signage Research & Education Conference
October 9, 2014

Overview of Presentation

1. A brief look back and update
2. Perception = Reality
3. Regulation of signage through the eyes of consumers

A brief look back...

- Establishment of Womack/Gemini chair (2007)
- NSREC keynote address (2009)
- BrandSpark's partnership – Longitudinal tracking
- Signs of the Times
- Speeches / presentations / Nat'l AMA
- Expert witness cases
- Added signage to marketing curriculum

BrandSpark / Better Homes and Gardens American Grocery Shopper Survey

- 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.

Previous surveys established that...

- Signs draw traffic to businesses
- Consumers infer quality from signage
- Signage trumps radio, internet, newspapers
- Over half of the population has driven by and failed to find a business due to signage communication failures
- Must be easily legible
- Can cause loss of business and consumer frustration when too small / illegible

Findings Regarding Aesthetics

- Most consumers prefer variety over uniformity of signage.
- < 10% of the population prefers non-verbal signs. 4 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.

Longitudinal Findings -1-

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

Four year avg. = 33.3% YES

Longitudinal Findings -2-

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

Four year avg. = 38.5% YES

Longitudinal Findings -3-

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

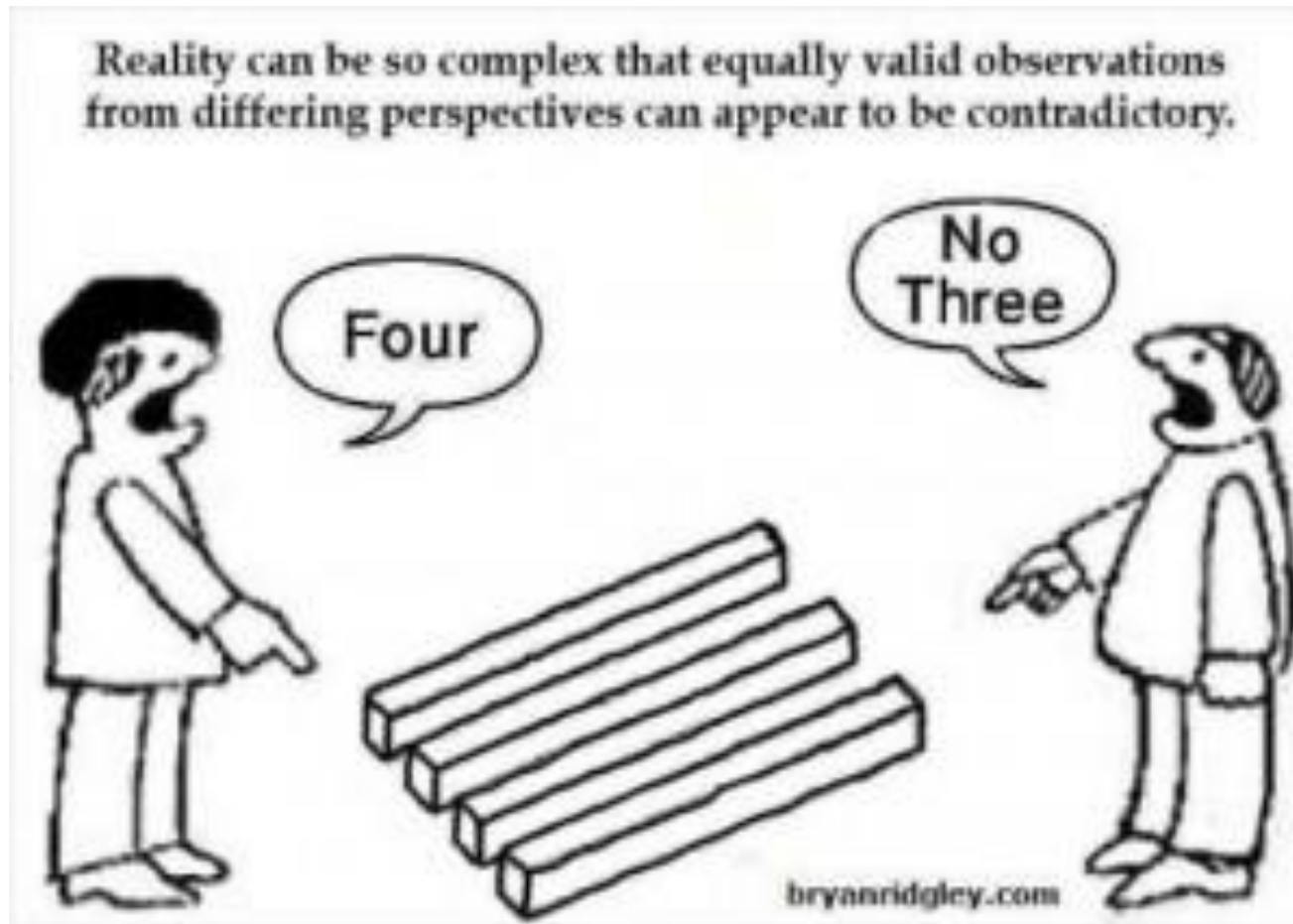
Four year avg = 53.8% YES

To whom has this happened?

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

- Women (68%) more prone than men (53%)
- Positively associated with education level
- Affects all age groups – not a “senior” problem
 - 30-34 age group (77.6%)
- No geographic correlation

II. Perception = Reality



Perception = Reality

- Objective v. subjective reality.
- People do not perceive things as they are; they perceive things as they perceive them.
- Perception is subjective, distorted, inaccurate.
- But consumers base their behaviors on their perceptions.

Researching Consumers' Perceptions

- Asking questions
- Perceptual mapping

	Atlanta	Boston	Chicago	Dallas	Denver	Houston	Las Vegas	Los Angeles	Miami	New Orleans	New York	Phoenix	San Francisco	Seattle	Washington
Atlanta		1095	715	805	1437	844	1920	2230	675	499	884	1832	2537	2730	657
Boston	1095		983	1815	1991	1886	2500	3036	1539	1541	213	2664	3179	3043	44
Chicago	715	983		931	1050	1092	1500	2112	1390	947	840	1729	2212	2052	695
Dallas	805	1815	931		801	242	1150	1425	1332	504	1604	1027	1765	2122	1372
Denver	1437	1991	1050	801		1032	885	1174	2094	1305	1780	836	1266	1373	1635
Houston	844	1886	1092	242	1032		1525	1556	1237	365	1675	1158	1958	2348	1443
Las Vegas	1920	2500	1500	1150	885	1525		289	2640	1805	2486	294	573	1188	2568
Los Angeles	2230	3036	2112	1425	1174	1556	289		2757	1921	2825	398	403	1150	2680
Miami	675	1539	1390	1332	2094	1237	2640	2757		892	1328	2359	3097	3389	1101
New Orleans	499	1541	947	504	1305	365	1805	1921	892		1330	1523	2269	2626	1098
New York	884	213	840	1604	1780	1675	2486	2825	1328	1330		2442	3036	2900	229
Phoenix	1832	2664	1729	1027	836	1158	294	398	2359	1523	2442		800	1482	2278
San Francisco	2537	3179	2212	1765	1266	1958	573	403	3097	2269	3036	800		817	2864
Seattle	2730	3043	2052	2122	1373	2348	1188	1150	3389	2626	2900	1482	817		2755
Washington D.C.	657	440	695	1372	1635	1443	2568	2680	1101	1098	229	2278	2864	2755	

What Makes Signs Difficult to Read?

(Kellaris, 2013)

- #1 - The letters are too small (83.3%)
- #2 – The placement of the sign makes it hard to see (71.4%)
- #3 – The sign is not sufficiently lit at night (63.6%)
- #4 – The color of the letters does not stand out from the background (60.3%)
- #5 – Digital signs change the message too fast (52.6%)
- #6 – The letters use a fancy font (47.8%)

What Makes Signs Difficult to Read? -2-

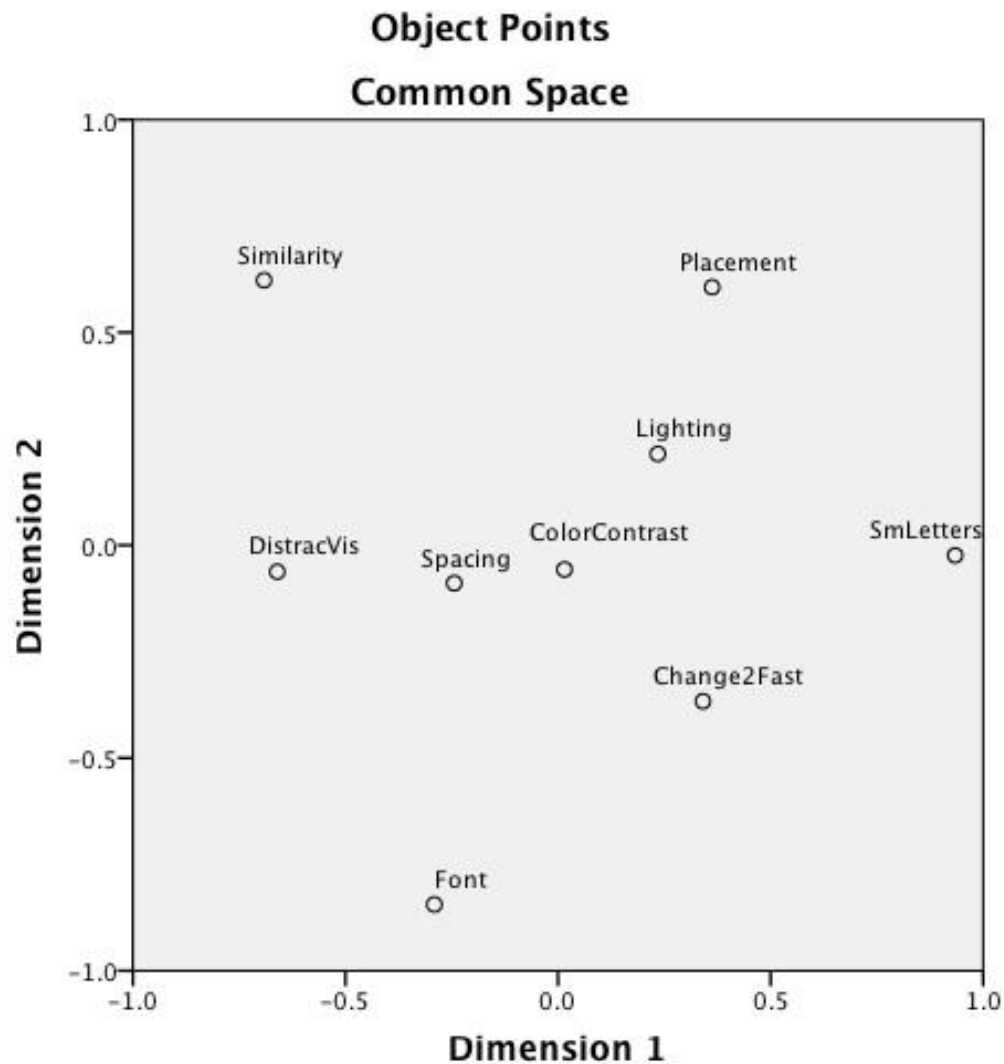
#7 – The letters are spaced too closely together (35.6%)



#8 – Sign looks very similar to others nearby (34.4%)

#9 – There are distracting visuals on the sign (31.7%)

Perceptual Map



III. Consumer Attitudes Towards the Regulation of Signs

- Online survey via Amazon M-Turk data collection service
- National sample of American adult consumers
- Initial $N = 546$
- Qualified $N = 516$ (54.8% male, 44.6% female)
- Ages 18 – 80 (77% 30-60 years)
- 44 U.S. states

Survey Content

Questionnaire...

- presented a sign regulation scenario and measured perceptions,
- Presented ten statements about regulation of signage and asked extent of agreement/disagreement,
- measured demographics and political orientations.

Scenario -1-

The City Council of Nicetown, Ohio, like most municipal governments, has an interest in regulating the signs used by stores, restaurants, other businesses, and churches in their town. When regulating signs, the Council's goals are to prevent safety hazards and to preserve an attractive appearance ("aesthetics"). The local sign ordinance places restrictions on the placement, height, area, and letter size of signs. To achieve a more uniform look in the town's shopping district, the ordinance also regulates the color of signs, and specifies that they cannot exceed a certain size and elevation.

Scenario -2-

Although these regulations result in a neat, orderly, attractive shopping district, they also create some problems. For example, many shoppers have a difficult time finding businesses. Many drive by and miss a business because the sign is too small to read or placed flat against the building, such that it is difficult to see from the road while driving. Business owners also complain that regulations prevent expression of their businesses' unique character, because their sign looks so much like all the other signs in the district. Additionally, a church was recently denied a permit to erect a new sign, because the small decorative cross rising above the main area of the sign was considered part of the sign and was 12 inches above the legal height limit.

Response Measures

In this situation, the city's actions seem...

Just 7 6 5 4 3 2 1 Unjust

Fair to business owners 7 6 5 4 3 2 1 Unfair to business owners

Fair to citizens 7 6 5 4 3 2 1 Unfair to citizens

Warranted 7 6 5 4 3 2 1 Unwarranted

Balanced 7 6 5 4 3 2 1 Unbalanced

Ethical 7 6 5 4 3 2 1 Unethical

Beneficial for the community 7 6 5 4 3 2 1 Not beneficial

The amount of restriction in this situation seems...

Appropriate 7 6 5 4 3 2 1 Inappropriate

Insufficient 7 6 5 4 3 2 1 Excessive

Responses to Scenario -1-

In this situation, the city's actions seem...

Just(7)Unjust(1)	Mean = 3.31
Fair(7)Unfair(1) to business owners	Mean = 2.69
Fair(7)Unfair(1) to citizens	Mean = 3.42
Warranted(7)Unwarranted(1)	Mean = 3.26
Balanced(7)Unbalanced(1)	Mean = 3.48
Ethical(7)Unethical(1)	Mean = 4.01
Beneficial(7)NotBeneficial(1) for the community	Mean = 3.17
OVERALL JUDGMENT	Mean = 3.33

Responses to Scenario -2-

The amount of restriction in this situation seems...

Inappropriate(1)Appropriate(7) Mean = 2.94

Excessive(1)Insufficient(7) Mean = 2.52

Effect of Political Orientation?

Political orientation measures:

- Conservatism/Liberalism
- Libertarianism/Authoritarianism
- Political party affiliation

Effect of Political Orientation

	Conservatives	Liberals
Just(7) Unjust(1)	3.3	3.3
Fair(7) Unfair(1) to business	2.6	2.7
Fair(7) Unfair(1) to citizens	3.3	3.5
Warranted(7) Unwarranted(1)	3.1	3.3
Balanced(7) Unbalanced(1)	3.3	3.6
Ethical(7) Unethical(1)	3.9	4.1
Beneficial(7) Not Beneficial(1)	3.1	3.2

No statistical differences

Effect of Political Orientation

	Conservatives	Liberals
Inappropriateness(1)/Appropriateness(7) of restriction	2.9	3.0
Excessiveness(1)/ Insufficiency(7) of restriction	2.5	2.5

No statistical differences

“In principle, business owners should be allowed wide latitude to use signs that promote their commercial interests.”

Overall Mean	Conservatives	Liberals
5.13	5.24	5.04

7 = strongly agree, 1 = strongly disagree

“Commercial signage, such as that used to identify stores, restaurants, and other businesses, must be tightly regulated to prevent chaos.

Overall Mean	Conservatives	Liberals
3.28	3.26	3.30

7 = strongly agree, 1 = strongly disagree

“Restrictions placed on the size and placement of signs can lead to signs that are too small and hard to read.”

Overall Mean	Conservatives	Liberals
5.69	5.67	5.71

7 = strongly agree, 1 = strongly disagree

“Excessive restriction of signage can lead to loss of business, which reduces tax revenues in the community.”

Overall Mean	Conservatives	Liberals
5.45	5.52	5.39

7 = strongly agree, 1 = strongly disagree

“Excessive restriction of signage in commercial areas can lead to inconvenience for shoppers seeking out a store or other business.”

Overall Mean	Conservatives	Liberals
5.75	5.75	5.74

7 = strongly agree, 1 = strongly disagree

“I would prefer more regulation of signage
in the community where I shop.”

Overall Mean	Conservatives	Liberals
2.75	2.62	2.86

7 = strongly agree, 1 = strongly disagree

“I have a wide band of tolerance for commercial signage,
given that signs convey useful information.”

Overall Mean	Conservatives	Liberals
5.39	5.57	5.22

7 = strongly agree, 1 = strongly disagree
 $t = 2.99, p < .003$ (two-tailed)

“Commercial signage is self-regulating in the sense that if consumers don’t like a sign, they will be less likely to patronize the business it represents.”

Overall Mean	Conservatives	Liberals
4.70	4.80	4.61

7 = strongly agree, 1 = strongly disagree

“Commercial signage should be regulated within reasonable limits.”
(Of course, but there is a follow-up question...)

Overall Mean	Conservatives	Liberals
4.81	4.61	4.98

7 = strongly agree, 1 = strongly disagree
 $t = -2.84, p < .005$ (two-tailed)

“When ‘reasonable limits’ are in dispute, regulators should strive to err on the side of liberty over restriction.”

Overall Mean	Conservatives	Liberals
5.47	5.65	5.31

7 = strongly agree, 1 = strongly disagree
 $t = 3.37, p < .001$ (two-tailed)

What does this mean for planners and regulators?

- Objective research evidence can be used to make informed decisions vs. reliance on opinion/theory/customary practice.
- Sign regulators can conduct such research in their own communities to gauge local preferences.
- Planners can help mitigate drive-by failures through reassessment of size and placement restrictions.

What does this mean for the signage industry?

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

Thank you!

