

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

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The American Shopper Study™ is conducted annually, in conjunction with the *Better Homes and Gardens* Best New Product Awards program, by leading independent market research firm BrandSpark International. Insights from a nationally-representative consumer panel of U.S. households are mined by BrandSpark in collaboration with academic partners at the University of Cincinnati Lindner College of Business. The 2011 survey, reported at last year's NSREC conference (Kellaris 2011), included a number of items related to signage communication. Findings provide objective evidence showing that (1) signs draw traffic to businesses, (2) consumers infer quality from signage, (3) signage trumps radio, internet and newspapers as an informational source regarding new products, and (4) a significant portion of the U.S. population (about half) has driven by and failed to find a business due to signage communication failure. (See also Kellaris 2012.)

As a follow-up to that survey, BrandSpark ran a supplemental study in 2012 that included new items related to signage, as well as the previous year's signage items. Invitations to participate in the study were sent via email to 7,000 consumer panelists, representing households in all 50 states. A stratified quota sample of 784 complete responses was weighted to conform to U.S. MRI data and reflects the principal shopper in terms of gender, age, and census region.

Longitudinal comparisons show slight increases in the proportion of consumers that have been drawn into unfamiliar stores based on the quality of their signs (35.8%), have made quality assumptions based on a store having clear and attractive signage (41.5%), and have driven by and failed to find a business because the signage was too small or unclear (60.8%). Results indicate that women (vs. men) experience signage-communication failures more often, that signage-communication failure affects all age groups (i.e., it is not a "senior" problem), and that it is positively associated with education level. People with more (vs. less) education are more likely to seek and use information from signage. Hence, they are more prone to communication failure when signs are not clearly visible and legible.

Additional items explored issues in signage communication and aesthetics. Findings show that one of the first things consumers notice about a new or unfamiliar business is the signage outside its building (75.2% agree or strong agree; 4.5% disagree). Findings also indicate that, in addition to identifying a business, signs can "convey the personality or character of the business" (85.7% agree or strongly agree; 2.4% disagree). Concerning the issue of legibility, 90.9% of consumers agree that "the letters on signs should be large enough for passing motorists to read at a

glance.” Moreover, 81.5% report getting “frustrated and annoyed when signs are too small to read.” In summary of the communication findings, the evidence suggests that signage drives traffic to businesses, creates first impressions, implies quality, conveys personality and must be easily legible, and loss of business and consumer frustration result when signs are too small or otherwise illegible.

The 2012 survey also explored issues related to the aesthetics of signage. Findings show that almost three times as many consumers prefer signs with words over signs composed entirely of symbols or icons, but about half (47.9%) of the consumer population prefers a combination of words and symbols.

Regarding the aesthetic impact of signage size, only 16.7% of consumers believe that “smaller signs are generally more attractive than larger signs.” Over a third (34.3%) disagree. There is also evidence that consumers prefer variety of signage design within a business district over uniformity of size/appearance, with 62.7% reporting that variety of signage design within a business district is “interesting and appealing” (7.2% disagree). Regarding uniformity of design, 58.0% of consumers believe that uniformity “...looks attractive, but makes businesses harder to identify [businesses] at a glance.” Findings also indicate that, in addition to functional utility of signage, consumers value signs for their historic and cultural significance. Only 4% disagree with the statement “vintage signs are worth preserving...”

In summary of our findings on signage aesthetics, it appears that most consumers prefer variety over uniformity of signage. Only an eighth 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. And a large majority of consumers believe vintage signs are worth preserving for their historic and cultural value.

These findings have a number of practical implications for planners, designers, and the signage industry.

References

Kellaris, James J. (2011), “100,000 Shoppers Can’t Be Wrong: Signage Communication Evidence from the BrandSpark International Grocery Shopper Survey.” *The Science of Signage: Proceedings of the National Signage Research and Education Conference*, Signage Foundation, Inc, Cincinnati, October 12-13, 2011.

Kellaris, James J. (2012), “On the Value of Signs,” *Signs of the Times*, 234 (3), p. 106.