

## Signals not the signs

How consumers read pubs from the outside

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Background

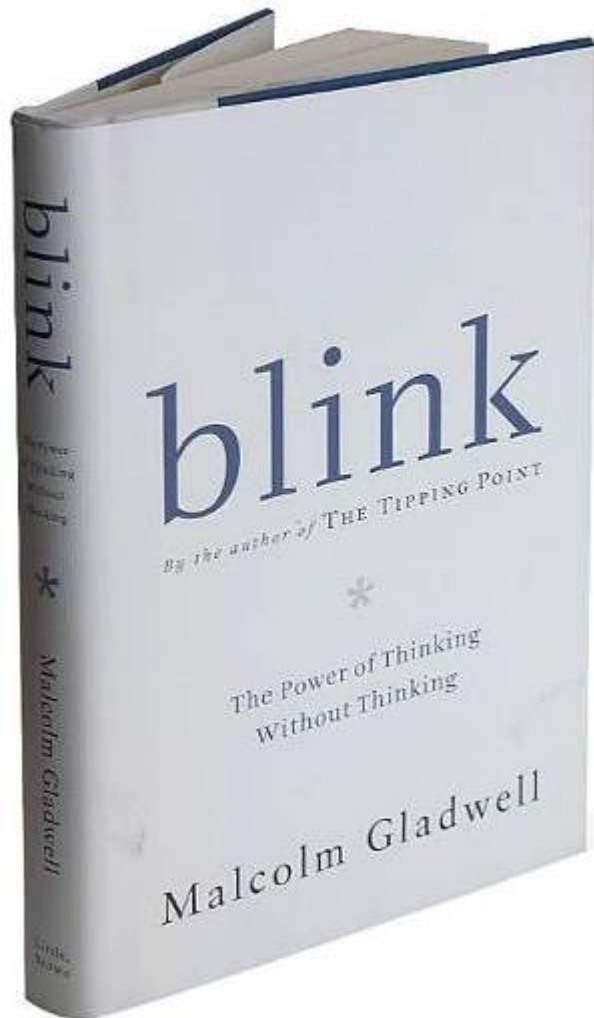
# External appearance – does it matter?



- Current and future choices and recommendations
  - because the external promise tells you what to expect inside
  
- It sets expectations
  - reinforcing the experience
  
- It's the shop window of the pub industry
  - influencing public perceptions of “pubs”
  - corporate pride

## Background

# Consumers make instant judgements about pubs



- As Malcolm Gladwell says in “Blink”
  - people “think without thinking”
  - they “thin slice” the evidence to reach conclusions
- Consumers “thin slice” what the pub looks like from the outside in an instant
  - they read the signals not the signs

## “Signs” vs. “Signage” vs. “Signals”

### Signs

The actual words and logos

- Provide information
- Convey ownership
- Third party endorsement (eg Cask Marque)

### Signage

The combined impact of all aspects of the signs

- Integration with architecture
- Number, size, content
- Condition
- Materials, font and filigree

### Signals

The visual clues that combine to set expectations and influence consumer choice

- Architecture, setting, colours
- Condition – cleanliness and maintenance
- Signage
- Indicators of consumer type (kids equipment, Sky, pool etc)

Background

90% of all communication is visual rather than verbal



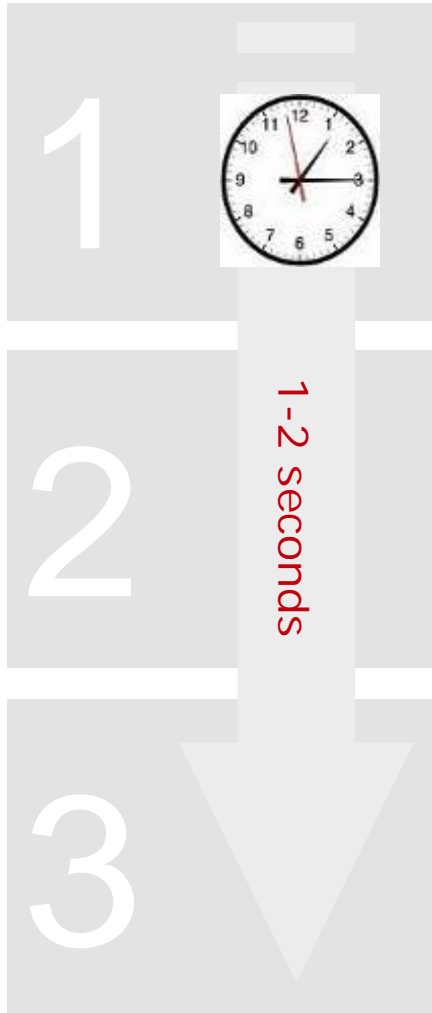
### Pale and sweaty

The first televised presidential debate in 1960 proved a godsend for the photogenic John Kennedy and the opposite for the rather less attractive Vice-President Richard Nixon. Looking back, Nixon wrote: "After the programme ended, callers, including my mother, wanted to know if anything was wrong, because I did not look well". The impression lingered; Nixon lost.

Radio listeners were split on who won the debate  
The large majority of TV viewers said Kennedy won the debate

How consumers "thin slice"

# Consumers "thin slice" the signals on pub externals to form an impression



## Architecture, colours and setting set expectations

- Modern or traditional?
- Local or drive to?

## Condition tells you if the pub is any good

- Condition of the building, the garden, the car park, the signs, the hanging baskets *etc...*
- How well looked after outside = quality of service inside

## Signals refine expectations

- How many signs, how they integrate with architecture, how written, materials, colours, filigree *etc...*
- Includes fixed signs, blackboards, banner, stickers

How consumers “thin slice”

## Example of how consumers “thin slice” the signals



Step 1: Architecture and setting: Both local urban pubs

Step 2: Condition: Both okay but A looks slightly more “tired” than B

Step 3: Signals:

A has banners, satellite dish, “brewery” signage, pub tables = solid local pub, male orientated, drink-led

B lacks signage but what there is integrates with building = mix of locals and others, more expensive,

Step 1 Architecture, colours and setting set expectations

# Step 1: Architecture, colours and setting set expectations



Flat roof  
Car park  
Brewery signs  
Residential setting  
= “Estate pub”

Black on black  
Open windows  
Modern furniture  
Lower case  
= “Traditional pub gentrified”

Thatched roof  
Ivy  
Unmade roads  
Open outlook  
= “Country pub”

Step 2 Condition dictates acceptability

## Step 2: Condition is the *key* factor - it tells consumers if the pub is likely to be any good



- How clean and well looked after the pub is on the outside communicates to people how clean and well looked the pub is likely to be inside
- The condition of the windows, the paintwork, the garden, the car park, the hanging baskets, the signs etc – all send signals about the likely internal
  - cleanliness of toilets
  - kitchen hygiene
  - how often the pipes are done
  - condition of the beer
  - service etc...
- Consumers are tuned into these signals
  - they “thin slice” the evidence
  - they’re usually proved correct

Step 2 Condition dictates acceptability

Good external condition suggests good service and retail standards inside – across all pub types



Step 2 Condition dictates acceptability

Poor external condition suggests poor internal service, lower standards inside

Lack of comfort



Tired fabric



Poster over name



Missing letters



Tatty signs



Dead hanging baskets



Step 3 Signals refine expectations

Signals refine expectations (remember that signals = “the visual clues that combine to set expectations and influence choice”)



Step 3 Signals refine expectations

# Signs themselves sends signals



The sign says "Quality Food" but the signals don't



The sign doesn't say "Quality Food" but the signals do

Step 3 Signals refine expectations

The number of signs can send signals to consumers about the pub



- More signs and banners
- = MAINSTREAM/STANDARD
- More male, limited portfolio, basic food



- Fewer signs and banners
- = MORE PREMIUM
- Mixed clientele, varied portfolio, more developed food

Step 3 Signals refine expectations

# Blackboards help set consumer expectations about the type and quality of food



- Coloured chalks, perma pens, hyperbole
- = MAINSTREAM/STANDARD
- Micro-waved food, wipe clean menus, corporate

- White chalk, handwritten, descriptive,
- = MORE PREMIUM
- Home cooked food, changing menu, individual

Step 3 Signals refine expectations

# Garden furniture sends signals to consumers



- All in one benches, branded brollies, plastic chairs

= MAINSTREAM/STANDARD

- More male, pub fayre, standard beer portfolio



- Individual chairs and tables, wooden, unbranded brollies

= MORE PREMIUM

- More expensive, better quality food, wider range of beers etc

Step 3 Signals refine expectations

# Consumers thin slice external signals in combination

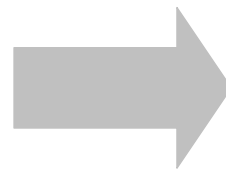


Black external but...  
- Posters, banners  
- Brewery signs  
- Font and filigree  
= Mainstream

Black external but...  
- Open windows,  
- Modern furniture  
- Minimal text  
= Premium

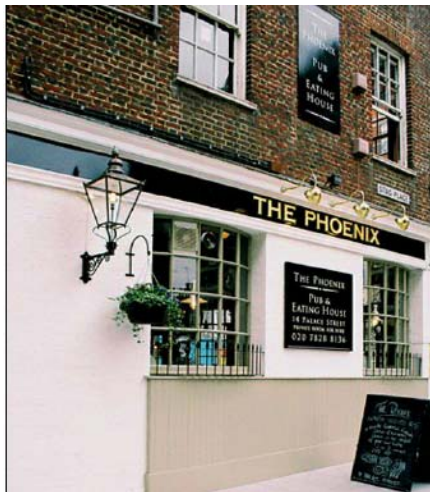
Why consumers read the signals and act

Consumers will continue to read the signals and act because experience tells them they're usually right



Implications

External appearance should sell the internal offer – don't oversell a premium offer or undersell a basic one



Implications

External appearance should sell the internal offer – don't send mixed signals



## Implications

External appearance should sell the internal offer – don't send confusing signals



- External = traditional, residential local pub?

- Internal = modern, urban bar?



## Summary

# Signals not the signs – the implications of how consumers read pubs from the outside.

1

Think hard about external retail standards

- It affects what consumers think about your pub
- It influences perceptions of the whole pub industry

2

External appearance should sell the internal offer

- Don't undersell a premium offer or oversell a basic one
- Don't send mixed signals

3

Remember that consumers read signals not signs

- Publicans and Pub Co's need a Signals strategy
- Think about what your pub looks like from 50 yards away

# Cardinal



Thank you

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