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HOME IMPROVEMENT: EIGHT STUDIES REVEAL AUDIO IS SALES ENGINE OF THE CATEGORY



By Pierre Bouvard November 1, 2021

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Eight consumer studies commissioned by the CUMULUS MEDIA | Westwood One Audio Active Group over a six-year period find audio listeners are the engine of home improvement sales and reveal creative and media strategies that can optimize impact.

Eight things to know:

- **The Home Depot has a branding opportunity as few loyal shoppers are aware of their innovative shopping apps and home improvement tech tools.**
- **Women prefer female voiceovers:** A major study found ads with a female voiceover drove stronger brand awareness and brand perceptions among both men and women.

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- **Big audio users are massive home improvement shoppers:** Podcast listeners and heavy AM/FM radio listeners are much bigger home improvement shoppers than heavy TV viewers. Heavy audio listeners spend more (4X) and shop more frequently (+43%).
- **Heavy up spending works:** A home improvement retailer that increased AM/FM radio spend 2.3X in 21 local markets experienced a significant surge in store traffic and sales.
- **Audio is an ideal media platform to tout home improvement e-commerce as heavy AM/FM radio and podcast listeners are more likely to shop online.**
- **AM/FM radio ads that focus on sales events for different home improvement departments create a “halo effect” that results in increased online shopping and store visits.**
- **AM/FM radio generates significant incremental reach for home improvement TV campaigns:** Recent TV campaigns for The Home Depot and a home improvement retailer saw significant lift in reach with the addition of AM/FM radio. The younger the demographic, the greater the reach lift generated by AM/FM radio.
- **AM/FM radio generates three times the sales lift of TV in a historic Nielsen TV and AM/FM radio sales effect study for a home improvement retailer.**

The Home Depot has a branding opportunity as few loyal shoppers are aware of their innovative shopping apps and home improvement tech tools

The Home Depot has innovative shopping tools that help shoppers navigate the stores to find items. Their app offers item finders, store navigation, and augmented reality to help homeowners visualize what new colors, designs, and improvements would look like.

Few frequent shoppers of The Home Depot are aware of these innovative shopping tools and apps, according to a MARU/Matchbox study commissioned by the CUMULUS MEDIA | Westwood One Audio Active Group in November 2020.

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Though awareness of The Home Depot's shopping innovation tools and functionality is nearly double among loyal customers, there is still room for improvement

% of respondents who associated each statement with The Home Depot

	Total	Shopped most often at The Home Depot
Has an app with a product locator to help me find products I need while I'm at a store	17%	30%
Has an app with a project calculator to help me estimate what I need to complete a project	15%	24%
Has an app with augmented reality so that I can see how products will look inside my home	9%	15%
Has an app where I can take a picture and immediately find the product that I need	8%	12%

How to read: 9% of respondents thought of The Home Depot as the home improvement retailer that "has an app with augmented reality so that I can see how products will look inside my home."

Source: MARU/Matchbox National Study - November 2020, 965 total respondents 18+

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Virtually all of The Home Depot's marketing efforts are focused on department special sales events. Very little marketing resources are devoted to brand building or touting useful shopping innovations. Campaigns touting these innovative shopping apps and tools could build greater shopper loyalty, brand perceptions, and sales.

Women prefer female voiceovers

A home improvement retailer that only used male voiceovers in their AM/FM radio ads wanted to study the impact of using female voiceover talent. Certain home improvement departments, like paint for example, report that the majority of purchase decisions are made by women.

The CUMULUS MEDIA | Westwood One Audio Active Group retained Nielsen to test consumer reaction to AM/FM radio ads voiced by women versus the traditional male narration. Certain DMAs were only exposed to AM/FM radio campaigns with a female voiceover. Other DMA markets heard the same ad with the usual male voiceover.

Markets with the female-voiced ads saw much stronger increases in brand awareness. Both men and women saw greater lifts in brand awareness as a result of the female-voiced ads.

Nielsen: Spirits
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Brand Fit And
Generates
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Equity And
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Especially Among
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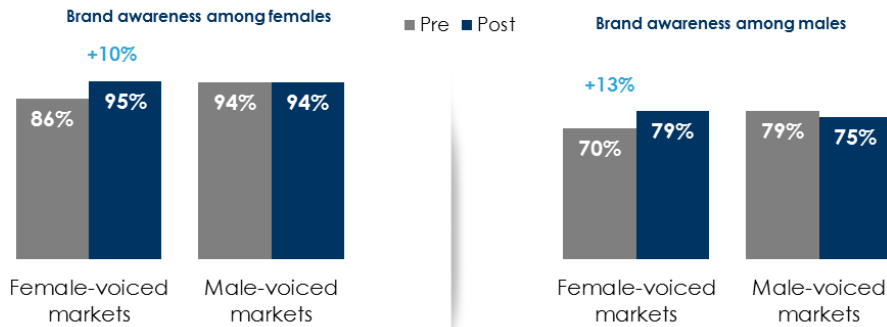
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The female-voiced ad grows brand awareness among both men and women



Source: Nielsen Campaign Effect Study - Home Improvement Retailer/Westwood One Q1 2017 Radio Campaign. Pre / Post: Males in Female-voiced markets 103 / 96; Males in Male-voiced markets 65 / 77; Pre / Post: Females in Female-voiced markets 98 / 106; Females in Male-voiced markets 101 / 111. Q8: When thinking about home improvement retailers, which ones come to mind?

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Brand perceptions for “a retailer for someone like me” and “a store where I feel comfortable shopping” were much stronger among women who were exposed to the female-voiced AM/FM radio ads.

Among women, female creative significantly lifts perceptions for “retailer for someone like me,” “store where I feel comfortable shopping,” “understands my needs,” and “provides the tools and advice I need to do projects myself”

Among women	Female-voiced markets	
	Pre	Post
Low-price leader	72.1	75.8
Home improvement authority	80.9	82.8
Understands my needs	86.0	90.3
Retailer for someone like me	85.4	94.8
Store where I feel comfortable shopping	87.7	95.1
Offers large selection of top-brand products	92.0	93.5
Provides the tools and advice I need to do projects myself	89.8	95.4

Source: Nielsen Campaign Effect Study - Home Improvement Retailer/Westwood One Q1 2017 Radio Campaign. Pre / Post (Among Aware of Home Improvement Retailer): Females in Female-voiced markets: 94 / 106; Male-voiced markets: 100 / 111. Q17: Please indicate how strongly you agree or disagree with the following statements about The Home Improvement Retailer.

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Of greatest significance, women exposed to female-voiced ads were better able to recall departmental ads from the home improvement retailer. After the female-voiced campaign, 80% of women could recall at least one of the retailer’s departmental ads compared to only 58% for the male-voiced campaign.

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Jun 21, 2021



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As the economy recovers, companies are looking to hire. AM/FM radio is the ideal medium for reaching passive job seekers. Here's why: bit.ly/2PI5hA6 [#westwoodone](#)



Over 80% of job seekers regularly listen to AM/FM radio

May 6, 2021

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May 4,

Among women, the female version significantly increases likelihood of being able to recall department advertising

Among females

Female-voiced markets			Male-voiced markets		
Department	Pre	Post	Department	Pre	Post
Recall any department	56%	80%	Recall any department	69%	58%
Appliances	37%	46%	Appliances	39%	21%
Paint	36%	30%	Paint	34%	25%
Flooring	26%	28%	Flooring	42%	32%
Lighting	21%	22%	Lighting	20%	10%
Tools	21%	20%	Tools	33%	15%
Other	2%	5%	Other	5%	2%
Don't recall	44%	20%	Don't recall	31%	42%

Source: Nielsen Campaign Effect Study - Home Improvement Retailer/Neighborhood One Q1 2017 Radio Campaign. NOTE: Small sample sizes. Recalled hearing ad for The Home Improvement Retailer. Females in Female-voiced markets Pre / Post: 40 / 30. Females in Male-voiced markets Pre / Post: 35 / 40. Spots running during the post-wave of the study included Carpet & Tile. Q1: You mentioned that you heard radio advertising recently for The Home Improvement Retailer. Which of the following departments (if any) were featured in the radio ad(s)?

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Big audio users are massive home improvement shoppers

A recent study conducted by MARU/Matchbox examined home improvement shopping behavior among heavy AM/FM radio listeners, podcast listeners, and heavy TV viewers. Audio listeners purchase from more retailers, shop more often, and spend far more than average.

Media scorecard: AM/FM radio and podcast listeners are home improvement super consumers

Home improvement spend by media usage

		Total	Heavy AM/FM radio listeners (8+ hours/week)	Podcast listeners	Heavy TV viewers (24+ hours/week)
Past year	Average spend at retailers	\$697	\$2,442	\$2,824	\$487
	Average # of shopping trips	4.7	6.8	6.1	4.5
	Average spent per shopping trip	\$150	\$357	\$466	\$157
	Average retailers shopped	3.1	4.2	4.2	3.0

How to read: The typical heavy AM/FM radio listener spent an average of \$2,442 at home improvement retailers in the past year.

Source: MARU/Matchbox National Study - November 2020, 965 total respondents 18+

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Versus heavy TV viewers, heavy AM/FM radio listeners **spend five times as much** (\$2,442 versus \$487), shop more retailers (4.2 versus 3), and make more shopping trips (6.8 versus 4.5). Podcast listeners also outperform TV viewers by sizable margins.

Heavy up spending works: Sales grow +9%, customers increase +3%, and store foot traffic up +5%

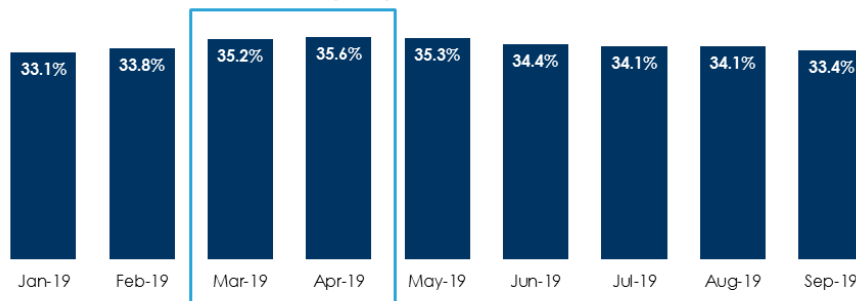
A home improvement retailer wanted to measure the store traffic and sales effect in markets where AM/FM radio spend more than doubled. Nielsen was retained to measure sales generated by AM/FM radio ads in the heavy up markets where spend was increased by 2.3X versus markets with typical spend levels.

Nielsen matched credit card spending in Portable People Meter homes of consumers who were exposed and not exposed to the AM/FM radio campaign. In the heavy up markets, sales grew +9% more than the typical weight markets and customer growth increased +3%.

PlacIQ, the firm that measures consumer foot traffic, was commissioned to study monthly foot traffic to the retailer before and after the heavy up campaign. PlacIQ reported the retailer's share of home improvement in-store traffic grew +5% from February 2019, the month before the heavy up campaign, to April 2019.

PlacIQ share of home improvement retail visitation: AM/FM radio heavy up lifts store visitation by +5%

% share of in-store home improvement retail visitation in 44 heavy up markets
Heavy up campaign:
+5% from February to April



Source: PlacIQ Traffic Health by DMA report January 2018 through September 2019

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Audio is an ideal media platform to tout home improvement e-commerce as heavy AM/FM radio and podcast listeners are more likely to shop online

In the MARU/Matchbox study, home improvement customers were asked if in the coming year they would shop more in-store, online, or in-store and online about the same amount. When looking at the profile of future online shoppers, they tended to lean 18-49, female, and were big podcast fans. Home improvement customers who planned to shop more in-store skewed male and older.

Those who plan to do more online shopping are younger, female, and podcast listeners

	In the next year, I plan to shop for home improvement/home decor...		
	In-store more often	Online and in-store about the same amount	Online more often
Persons 18-34	22%	30%	33%
Persons 35-49	24%	30%	36%
Persons 50-64	25%	25%	18%
Persons 65+	28%	15%	13%
Men	54%	50%	48%
Women	46%	50%	52%
Heavy AM/FM radio listeners	24%	26%	27%
Podcast listeners	34%	44%	50%
Heavy TV viewers	31%	22%	22%
Average spend (past year)	\$1,782	\$1,491	\$1,646

How to read: Select a shopper segment and read down. Among consumers who plan to shop online more often for home improvement/home decor in the next year, 33% are 18-34.

Source: MARU/Matchbox National Study – November 2020, 965 total respondents 18+

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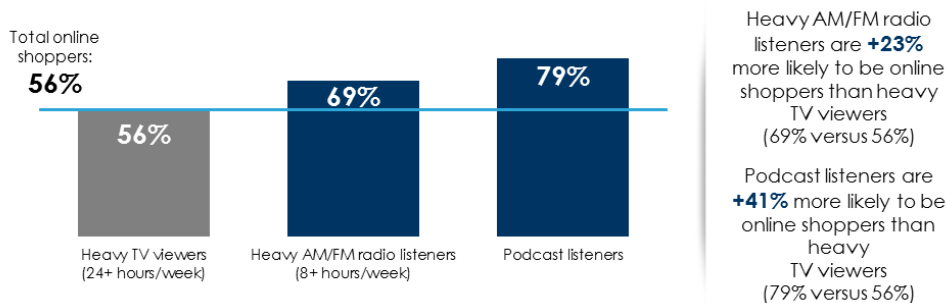
Home improvement shoppers were asked if they had shopped online in the last year. Overall, 56% said they had shopped online in the past year.

Heavy AM/FM radio listeners (69%) and the podcast audience (79%) are far more likely to be online home improvement shoppers. Podcast listeners are +41% more likely to have shopped online. Heavy AM/FM radio listeners are +23% more likely to shop online.

Versus linear TV viewers, audio listeners are more likely to shop online for home improvement. Audio is a much stronger sales channel for direct-to-consumer brands and firms seeking online transactions.

Audio consumers are more likely to be online home improvement shoppers compared to heavy TV viewers

% who shopped online for home improvement/home decor (past year)



How to read: 69% of heavy AM/FM radio listeners shopped online for home improvement/home decor in the past year.

Source: MARU/Matchbox National Study – November 2020, 965 total respondents 18+

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AM/FM radio ads that focus on sales events for different home improvement departments create a “halo effect” that results in increased online shopping and store visits

A home improvement retailer wondered if a series of simultaneous AM/FM radio campaigns for different departments created a synergistic campaign effect for the brand. Nielsen surveyed consumers on the number of AM/FM radio campaigns they could recall from the retailer.

The greater the number of AM/FM radio campaigns recalled, the more likely consumers took an action such as going to the store and shopping on the retailer's website. Nielsen found those who recalled 3+ AM/FM radio ads shopped in-store and online and researched products/services at a higher rate.

Halo effect: Hearing multiple ads from the home improvement retailer had a major impact on actions taken after exposure

Recall of 3+ AM/FM radio department ads drives consumers to shop and research products/services at the home improvement retailer stores and on the web at a higher rate

Which of the following actions, if any, did you take after hearing the home improvement retailer ads:	0 ads	1 ad	2 ads	3+ ads
Went to a home improvement retailer store	47%	37%	47%	57%
Went to the home improvement retailer website	28%	38%	34%	49%
Clicked on an online ad for the home improvement retailer	22%	32%	26%	57%
Sought out more information on a product featured in ad	32%	29%	29%	45%
Purchased product/service from the home improvement retailer store	4%	2%	11%	8%
Ordered product from the home improvement retailer website	1%	--	1%	4%

Source: Nielsen 2016 study commissioned by Westwood One

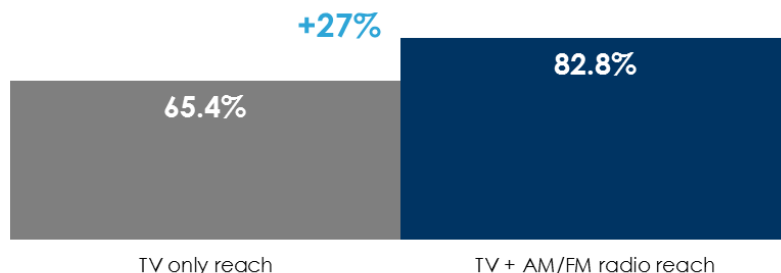
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AM/FM radio generates significant incremental reach for home improvement TV campaigns

A Nielsen Media Impact analysis of recent home improvement retailer TV campaigns reveals significant lift in reach with the overlay of AM/FM radio. In May 2021, a home improvement retailer's TV campaign reached 65% of persons 18+. The AM/FM radio campaign generated an additional +27% of reach, lifting campaign reach to 83%.

AM/FM radio delivers significant incremental reach (+27%) to a home improvement retailer's TV campaign

Nielsen Media Impact: % reach persons 18+: TV only vs. TV + AM/FM radio, May 2021 campaign



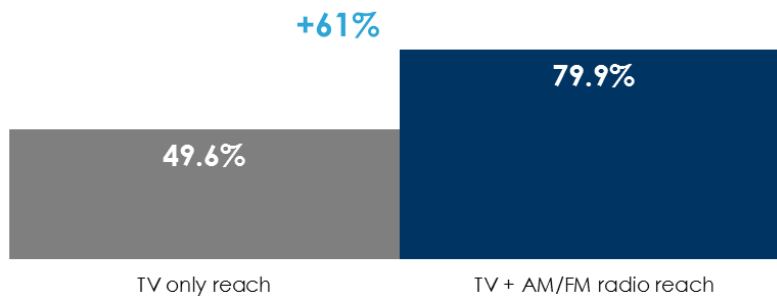
Source: Nielsen Media Impact May 2021, persons 18+: TV budget and TV ad occurrence based on Nielsen Ad Intel. AM/FM radio spend based on Miller Kaplan May 2021 Advertiser History report; Network Radio GRPs based on all RADAR networks at an average CPP of \$5000

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Nielsen Media Impact reports The Home Depot's May 2021 TV campaign reached only half of American persons 25-49. The Home Depot's AM/FM radio campaign caused their TV reach to soar by +61% for a total net reach of 80%.

AM/FM radio delivers significant incremental reach (+61%) to The Home Depot's TV campaign

Nielsen Media Impact: % reach persons 25-49, The Home Depot May 2021 campaign



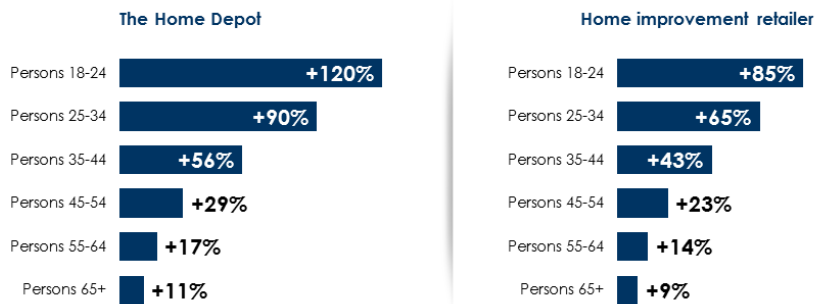
Source: Nielsen Media Impact May 2019 & May 2021, persons 25-49; TV budget and TV ad occurrence based on Nielsen Ad Intel; AM/FM radio spend based on Miller Kaplan Advertiser History report; Network Radio GRPs based on all RADAR networks at an average CPP of \$5000

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Nielsen Media Impact found the younger the demographic, the greater the lift in reach generated by AM/FM radio. The home improvement retailer's AM/FM radio campaign generated an incremental reach lift of +43% among persons 35-44. The Home Depot's AM/FM radio campaign increased reach by +90% among persons 25-34.

The younger the demo, the greater the incremental reach growth generated by AM/FM radio

Nielsen Media Impact: incremental reach lift %: TV only vs. TV + AM/FM radio, May 2021 campaigns



How to read: Among persons 18-24, AM/FM radio contributed +85% incremental reach to the May 2021 campaign of the home improvement retailer.

Source: Nielsen Media Impact May 2021, persons 18+; TV budget and TV ad occurrence based on Nielsen Ad Intel; AM/FM radio spend based on Miller Kaplan May 2021 Advertiser History report; Network Radio GRPs based on all RADAR networks at an average CPP of \$5000

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AM/FM radio generates three times the sales lift of TV in a historic Nielsen TV and AM/FM radio sales effect study for a home improvement retailer

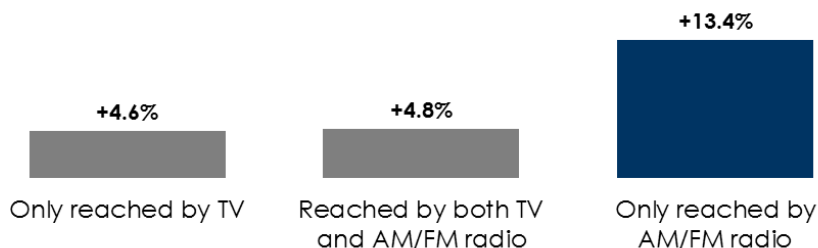
A home improvement retailer sought to understand the sales effect of their AM/FM radio spend in the context of their television campaigns. In a first for the category, Nielsen was commissioned to undertake a study of the entire TV and AM/FM radio investment for a given month.

Nielsen matched TV and AM/FM radio advertising exposures from the Portable People Meter to credit and debit card purchases from the same homes. Purchases among those not exposed to the campaign were compared to those exposed.

Consumers exposed to just the AM/FM radio campaign generated a +13.4% increase in sales, three times that of those who were only exposed to the TV campaign.

AM/FM radio drove the strongest sales growth

% change exposed/unexposed: total spend



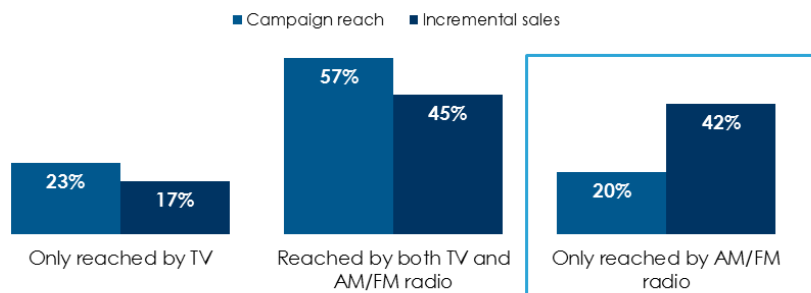
Source: Nielsen Buyer Insights, P18+. Retailer TV Only Campaign Sample: Unexposed (n=3,393)/Exposed (n=8,526); AM/FM Radio Only Campaign Sample: Unexposed (n=3,393)/Exposed (n=5,376); Both TV and AM/FM Radio Only Campaign Sample: Unexposed (n=3,393)/Exposed (n=20,173). Pre-Period: 5/1/2017 – 5/28/2017; Campaign Period: 4/30/2018 – 5/27/2018

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AM/FM radio advertising exposure drove the vast majority of the home improvement retailer's sales. Those only reached by the AM/FM radio campaign represented 20% of total campaign reach but generated 42% of the incremental sales lift.

Consumers reached both by the TV and AM/FM radio campaign were responsible for 45% of the sales lift. Those just exposed to the TV campaign represented only 17% of incremental sales.

Those only exposed to AM/FM radio represented 20% of the total reach yet generated 42% of incremental sales lift



How to read: The left bars represent the proportion of total campaign reach only exposed on TV, both TV/AM/FM radio, and only on AM/FM radio. The darker bars on the right represent the share of incremental sales lift generated by each of the three media segments. Those only reached by the AM/FM radio ads represent 20% of total campaign reach but generated 42% of the entire sales lift.

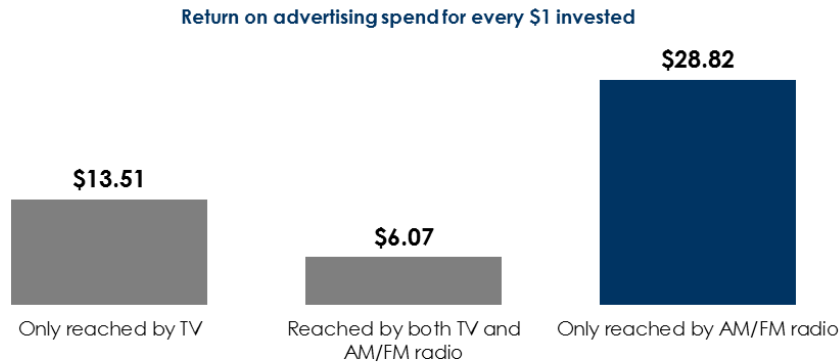
Source: Nielsen PPM Custom Analysis, 4/30/18 – 5/27/18 / P18+ unique audience exposed to the retailer's campaign on TV & AM/FM radio

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Not only was AM/FM radio the most effective media platform for the retailer, it was also the most efficient. AM/FM radio's return on advertising spend was twice that of television.

A dollar of AM/FM radio advertising generated \$28.82 in incremental sales. A dollar of TV advertising resulted in \$13.51 of sales for the home improvement retailer.

AM/FM radio had the strongest return on advertising spend



Source: Nielsen Buyer Insights, P18+. Retailer TV Only Campaign Sample: Unexposed (n=3,393)/Exposed (n=8,526); AM/FM Radio Only Campaign Sample: Unexposed (n=3,393)/Exposed (n=5,374); Both TV and AM/FM Radio Only Campaign Sample: Unexposed (n=3,393)/Exposed (n=20,173). Pre-Period: 5/1/2017 – 5/28/2017; Campaign Period: 4/30/2018 – 5/27/2018

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Key takeaways:

- **The Home Depot has a branding opportunity as few loyal shoppers are aware of their innovative shopping apps and home improvement tech tools.**
- **Women prefer female voiceovers:** A major study found ads with a female voiceover drove stronger brand awareness and brand perceptions among both men and women.
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