

# The National Association of Broadcasters

NATIONAL PRESS BUILDING \* \* \* \* \* WASHINGTON, D. C.  
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## NAB REPORTS

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### BROADCAST ADVERTISING IN NOVEMBER

#### Developments of the Month

**B**RROADCAST advertising declined slightly in November. Total gross time sales amounted to \$7,232,592, a decrease of 1.9% as compared with October. A drop of 3.5% in national network volume and one of 3.0% in local broadcast advertising were responsible for the downward trend. Regional network advertising rose 11.4% as against the preceding month, while national spot volume gained 4.0%.

#### Comparison with Preceding Year

November time sales showed a marked improvement over the same month of 1933. Total gross time sales were 20.8% above the previous year's level. Regional networks led with an increase of 44.4%. National networks gained 26.7% in volume, national spot advertising 19.8%, and local broadcast advertising 5.2%. The degree to which the current month's revenues exceeded those of the same period of 1933 was less with respect to all portions of the broadcast advertising field than it had been in October.

#### Comparison with Other Media

National magazine advertising declined 3.6% as compared with October. Magazine advertising revenues, however, were 10.4% higher than in November of the preceding year. National farm paper volume rose slightly during the month, experiencing a gain of 5.9% as against the same period of 1933. Newspaper advertising experienced the usual November seasonal decline, advertising volume dropping 3.7% as compared with the previous month. November newspaper advertising was 5.0% greater than for the same month of 1933.

#### Other Trends of the Month

Non-network advertising revenues of regional and clear channel stations declined slightly during the month, while

those of 100-watt stations rose 9.0%. Non-network revenues of stations of over 1,000 watts in power were 10.9% greater than in November, 1933. Stations in the 250-1,000-watt class experienced a 14.5% gain over the same period of last year, and 100-watt stations a gain of 5.7%. Except for a marked gain in revenues as compared with November a year ago on the part of the New England-Middle Atlantic Area, there were no significant changes in non-network broadcast advertising on the basis of geographical districts.

A rise of 11.0% in national spot electrical transcription volume as compared with October, and an 11.7% decline in local transcription business were the only trends of significance in the rendition field. November national spot transcription volume was 35.8% greater than in 1933, while live talent national spot increased 70.0%. Local transcription volume was 14.1% less than during the same month of last year, and local live talent business 17.3% greater. Spot announcement volume dropped 45.5% in the national field and 3.3% in the local field, records declining materially in both instances.

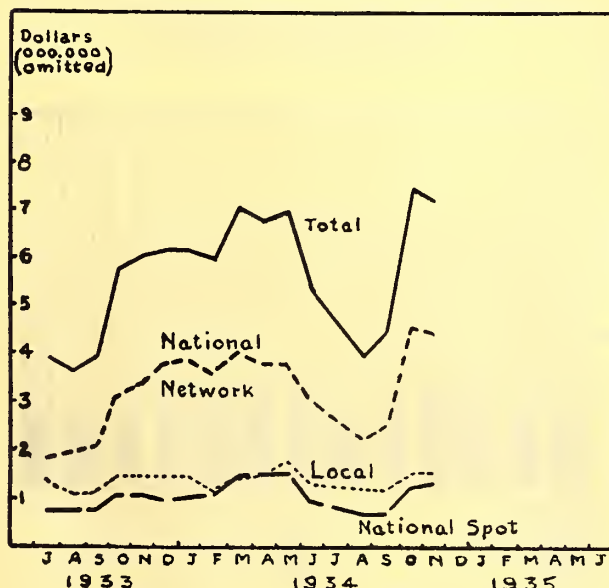
#### Broadcast Advertising Sponsors

Principal increases as compared with October included the following: National networks—Soap and kitchen supplies, 25.5%; foodstuffs, 3.5%, and pharmaceuticals, 6.5%. National spot advertising—Confectionery, 22.7%; cosmetics, 27.9%; pharmaceuticals, 10.0%, and foodstuffs, 9.0%. Local broadcast advertising—Radio sets, 18.1%, and foodstuffs, 31.0%. The most important declines in the national network field occurred in the automotive and clothing groups. National spot financial advertising, national and local soap and kitchen supply advertising, and local automotive volume also declined materially.

Compared with November, 1933, national networks experienced marked gains in the automotive, pharmaceutical, cosmetic, food, confectionery, household equipment, kitchen supply, radio set, and tobacco groups. Both household equipment and soap and kitchen supply advertising

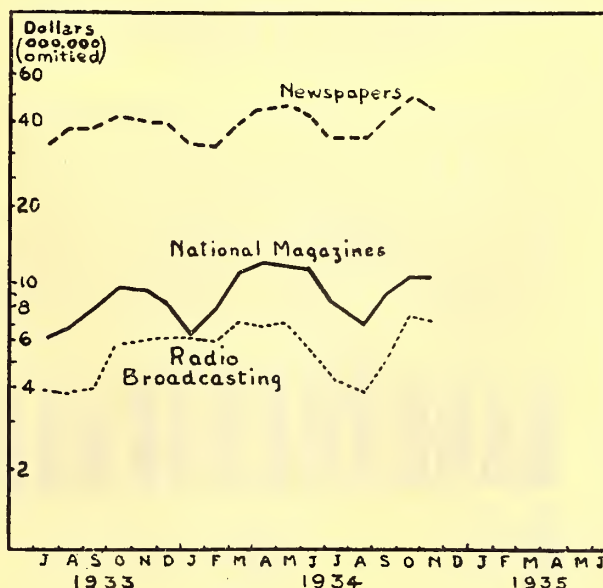
### RADIO BROADCAST ADVERTISING VOLUME

July, 1933, to June, 1935



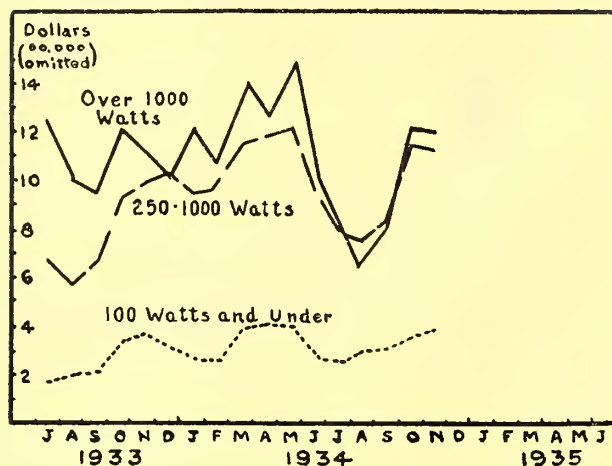
### ADVERTISING VOLUME MAJOR MEDIA

July, 1933, to June, 1935



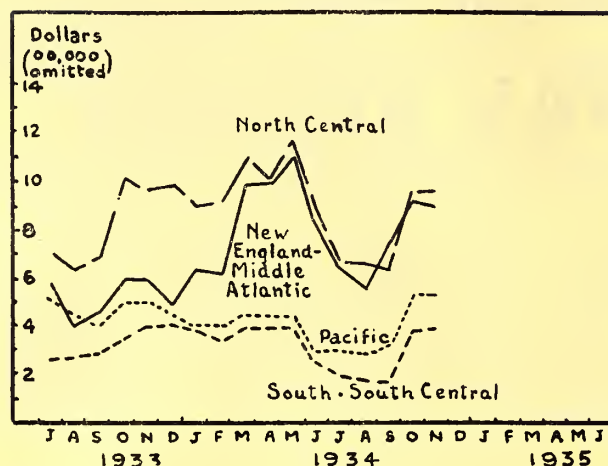
### NON-NETWORK ADVERTISING BY STATION POWER

July, 1933, to June, 1935



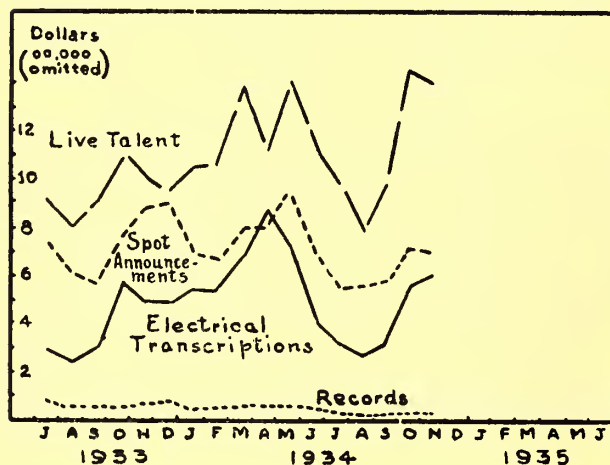
### NON-NETWORK ADVERTISING BY GEOGRAPHICAL DISTRICTS

July, 1933, to June, 1935



### NON-NETWORK BROADCAST ADVERTISING BY TYPE OF RENDITION

July, 1933, to June, 1935



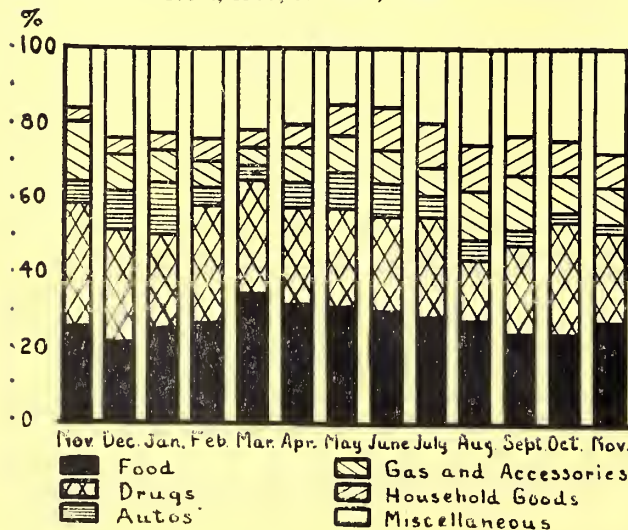
### NATIONAL NETWORK ADVERTISING BY TYPE OF SPONSORING BUSINESS

Nov., 1933, to Nov., 1934



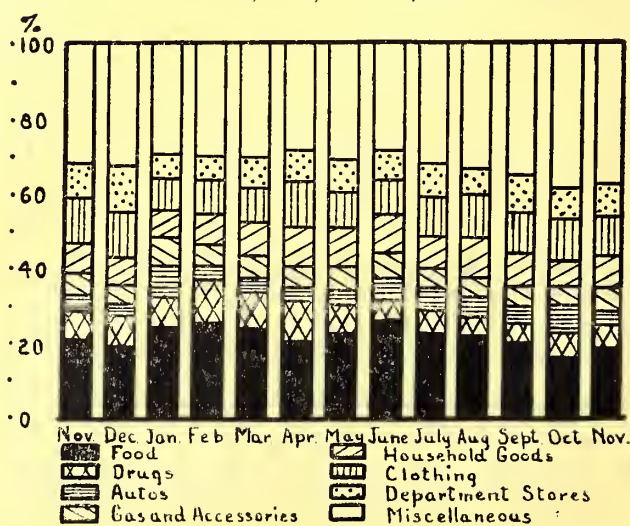
### NATIONAL SPOT ADVERTISING BY TYPE OF SPONSORING BUSINESS

Nov., 1933, to Nov., 1934



### LOCAL ADVERTISING BY TYPE OF SPONSORING BUSINESS

Nov., 1933, to Nov., 1934





practically doubled last November. National spot advertising exceeded the same month of last year in the clothing, pharmaceutical, food, household equipment, soap, financial, radio set, department store, and tobacco fields. Department store advertising (mostly mail order branches) rose to three and one-half times last year's level for November, while tobacco advertising increased approximately nine times. Local auto accessory and gasoline, radio set, and department store advertising also rose.

More detailed information as to trends in the various sponsor groups is as follows:

1a. **Amusements.** Little or no change from preceding month. Volume less than half November of last year. National and local both down.

1. **Automobiles.** Network down 48.9% as compared with October, local down 20.0%, and national spot unchanged. Network 14.8% above November, 1933, local unchanged, and national spot down 28.2%.

2. **Accessories, gasoline and oil.** Slight seasonal gains during month in all forms of broadcast advertising. National spot gain greatest with 9.3%. Networks 7.0% above last November, local broadcast advertising 9.0% greater, and national spot 23.3% less.

3. **Clothing and apparel.** Regional volume alone gained over October. National networks down 17.0%, national spot 13.0%, and local 6.6%. National network volume 21.0% below same month last year, and local advertising 5.5% lower. National spot volume up four and one-half times, work-suits being the principal reason.

4. **Drugs and pharmaceuticals.** Network volume 6.5% above October, and national spot volume 10.0% greater. Local down 21.0%. National network advertising 53.6% above November of last year, national spot business 36.6% greater, and local half as great.

5. **Cosmetics.** National network 7.6% below preceding month, local 38.0% lower, and national spot 27.9% greater. National network volume 38.0% above same period of 1933, national spot business half as great, and local volume unchanged.

6. **Foodstuffs.** National network gain over month was 3.7%, national spot 9.0%, and local 31.0%. Regional volume unchanged. Network volume 20.0% greater than in November, 1933, national spot 16.6% greater, and local 15.0% less.

7. **Beverages.** Practically no change from preceding month. Network volume 32.0% below same period of last year, and local volume 10.0% below. National spot business 14.7% greater.

8. **Confectionery.** Other than 22.7% gain in national spot volume, there was little change from preceding month. Network volume 38.2% greater than November, 1933, with some gains in the general field.

9. **Household equipment and appliances.** Network volume unchanged as compared with October, regional network doubled, national spot 34.0% greater, and local 6.0% less, the latter a seasonal trend. Network volume more than doubled same period of last year, with national spot up 50.0% and local business unchanged.

10. **Soap and kitchen supplies.** National networks up 25.5%, national spot down 14.0%, and local down 50.0% as compared with previous month. National network volume one and one-half times November, 1933, national spot volume five and one-half times that level, and local advertising halved.

11. **Financial and insurance.** Slight decrease in network volume as against October, national spot down 10.0%, and local up 6.0%.

12. **Radio sets.** National spot volume double previous month, with local up 18.1% and national network volume unchanged. Network advertising 59.8% above November last year, national spot 34.4% greater, and local more than tripled.

13. **Department and general stores.** Local volume unchanged. National spot more than tripled due to increase in mail order department store business principally.

14. **Tobacco.** National network volume 4.7% lower than preceding month. National spot up 9.0% and local up 31.0%. Compared with last November national network 63.4% greater and national spot nine times greater.

15. **Miscellaneous.** Spot and local business down as against October, with national network volume 38.0% greater. Marked increase in miscellaneous business over all parts of broadcasting structure during past few months indicates trend toward wider interest in radio.

**General Retail Advertising.** General retail advertising was 3.1% above October and 25.0% greater than in November, 1933. Principal gains during the month occurred in the gasoline and accessory, grocery store, furniture and hardware store, and retail radio fields. Automobile dealer, clothing store, and electrical equipment dealer advertising declined.

Automotive retail advertising was 46.4% greater than in November, 1933, drug store advertising 25.0% above that period, grocery store advertising 50.0% greater, restaurant advertising 61.2%, and furniture store advertising 42.5% above the same period of last year. Hardware store advertising tripled.

#### Business Conditions

The new year opens with a considerably more optimistic picture than that presented several months ago. The *New York Times* index of business activity on December 29 stood at 83.8% of the 1923-1925 level, as compared with 78.8% at the beginning of the month and 69.9% in December, 1932.

The index of steel activity was 39.0% of the 1923-1925 average, as compared with 30.0% at the close of 1933 and 14.0% at the end of the preceding year. The electric power index continued its gain of recent months, reaching the highest point it has achieved since December, 1930. Automobile production was 47.3% of the 1923-1925 average as compared with 30.3% a year ago. Freight car loadings in recent weeks have declined less than the usual seasonal amount. Rural retail sales in November were 5.0% above the same period of 1933, while grocery chain sales were 3.0% greater. Dollar sales of the two leading mail order companies in November were 23.0% above the preceding year. Preliminary reports of Christmas retail volume has been most encouraging.

### RADIO BROADCAST ADVERTISING BY TYPE OF SPONSORING BUSINESS (November, 1934)

Type of Sponsoring Business	Gross Time Sales				
	National Networks	Regional Networks	National Spot	Local	Total
1a. Amusements .....	—	—	\$772	\$30,460	\$31,232
1-2. Automobiles and Accessories:					
(1) Automobiles .....	\$263,800	—	28,133	43,217	335,150
(2) Accessories, gas and oils .....	342,390	\$24,805	139,340	86,022	592,557
3. Clothing and apparel .....	34,332	1,396	33,190	154,120	223,038
4-5. Drugs and toilet goods:					
(4) Drugs and pharmaceuticals .....	598,425	950	364,135	57,602	1,021,112
(5) Toilet goods .....	854,749	1,417	60,250	23,730	940,146
6-8. Food products:					
(6) Foodstuffs .....	923,132	25,188	244,317	203,678	1,396,315
(7) Beverages .....	246,096	9,600	47,180	39,270	342,146
(8) Confections .....	170,141	2,000	27,265	2,900	202,306
9-10. Household goods:					
(9) Household equipment and furnishings .....	28,943	5,224	63,150	109,170	206,487
(10) Soap and kitchen supplies .....	244,932	360	53,900	3,138	302,330
11. Insurance and financial .....	51,407	2,675	22,846	41,320	118,248
12. Radios .....	91,231	—	3,855	26,100	121,186
13. Retail establishments .....	—	—	9,392	125,167	134,559
14. Tobacco products .....	301,551	2,123	16,690	6,300	326,664
15. Miscellaneous .....	215,324	31,881	186,210	506,061	939,476
<b>Total .....</b>	<b>\$4,366,453</b>	<b>\$107,619</b>	<b>\$1,300,625</b>	<b>\$1,458,255</b>	<b>\$7,232,952</b>