

# The National Association of Broadcasters

NATIONAL PRESS BUILDING \* \* \* \* \* WASHINGTON, D. C.

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## NAB REPORTS

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### BROADCAST ADVERTISING IN FEBRUARY

#### Developments of the Month

WITH the exception of an 8.5% increase in national non-network volume, broadcast advertising in February exhibited the usual seasonal trends. Total gross time sales were \$7,205,145, a decrease of 2.5% as compared with the preceding month. National network volume declined 5.0%. Local broadcast advertising dropped 3.5%, while regional network business remained at approximately the previous month's level. Both declines were less than occurred in February of the preceding year.

#### Comparison with Previous Year

Broadcast advertising volume continues to maintain a consistently higher level than during the same period of 1934. Total broadcast advertising in February was 21.2% greater than during the same month of last year. Gains in specific forms of broadcast advertising were as follows: National networks, 24.4%; regional networks, 5.5%; national non-network business, 23.6%; and local broadcast advertising, 9.5%.

#### Comparison with Other Media

Major media exhibited the usual seasonal trends during February. National magazine advertising rose slightly during the month, though by no more than the usual seasonal amount. National farm paper advertising increased 59.3% as compared with January, while newspaper advertising decreased slightly. Magazine volume was 6.3% above last February, while national farm paper and newspaper advertising each rose 5.7%.

#### Non-network Trends

General non-network advertising, national and local combined, increased slightly during the month and was

16.1% above the same month of 1934. Stations of 5,000 watts and over in power increased their business 5.6% above January, and reached a level 31.4% higher than February of last year. Regional station non-network business declined 12.9% during the month and was 4.2% under the 1934 level. Local station volume remained unchanged during the month and was 27.0% above last year.

New England, Middle Atlantic, Mountain and Pacific non-network advertising declined slightly in February, as seems to be usual, while Southern and Middle Western business rose moderately, again seemingly a normal trend. Gains in non-network volume in various sections, as compared with last February, were as follows: New England-Middle Atlantic Area, 5.9%; Southern Area, 18.8%; Middle West, 13.8%, and Mountain and Pacific district, 10.3%.

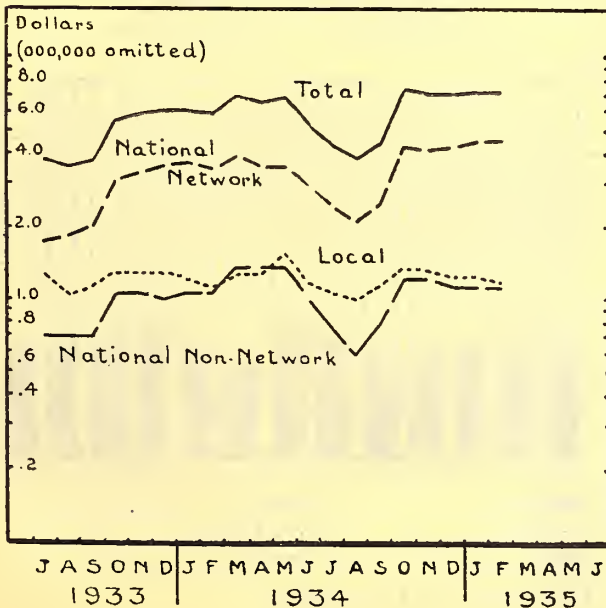
No new trends were indicated as to types of rendition employed in non-network advertising. Electrical transcription volume continued slow, national volume being 3.2% under last February and local volume 4.0% lower. National non-network live talent business continued to show strength and was 37.5% above the level of the previous year. National announcement volume was 42.0% higher than last February, due to the very poor showing of the latter month rather than to any general upward trend. Local live talent volume was 13.8% greater than the same month of 1934.

#### Sponsor Trends in February

The usual seasonal trends were in evidence in most fields of broadcast advertising sponsorship. The February decline in automotive advertising was only half as great as in 1934. Clothing advertising increased appreciably in all fields. Drug advertising continued to show strength everywhere except in the local field. A general increase occurred in household equipment advertising for the second consecutive month. National non-network and local financial advertising were both approximately 40.0%

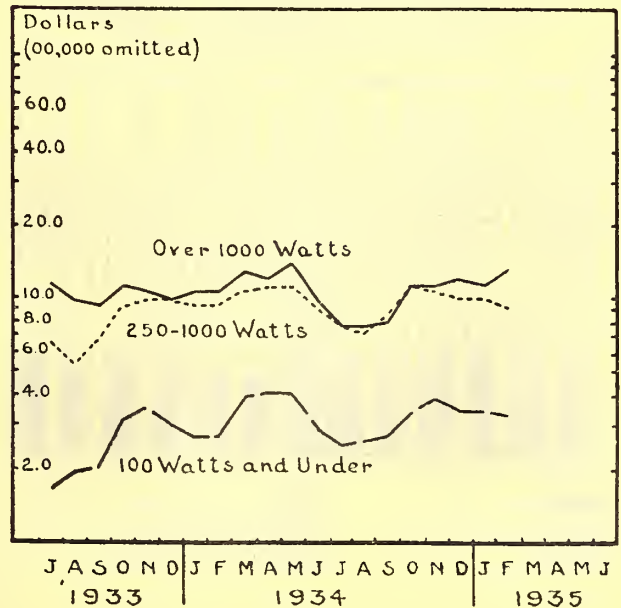
### RADIO BROADCAST ADVERTISING VOLUME

July, 1933, to February, 1935

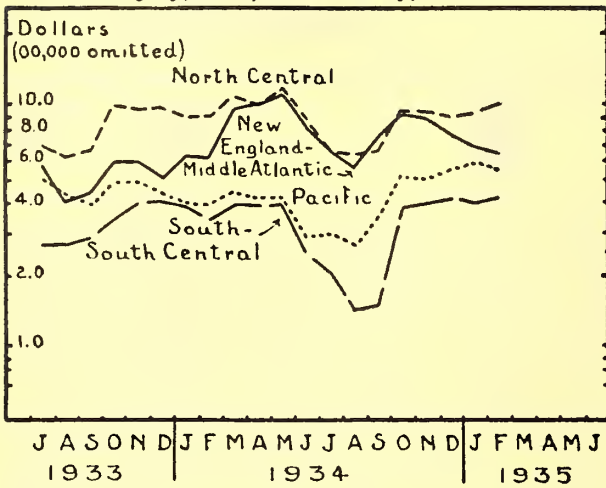


### NON-NETWORK ADVERTISING BY STATION POWER

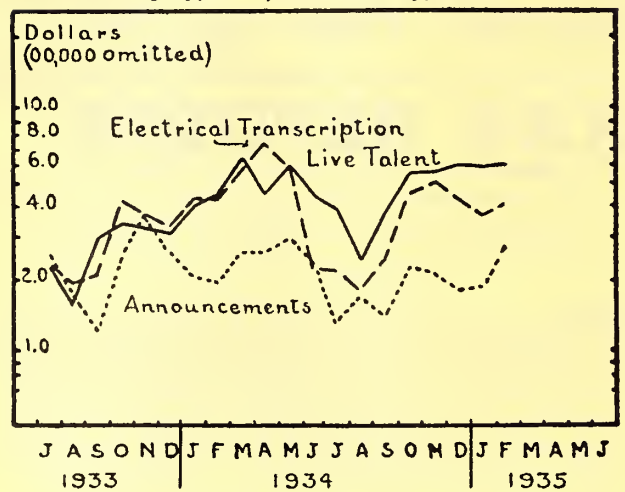
July, 1933, to February, 1935



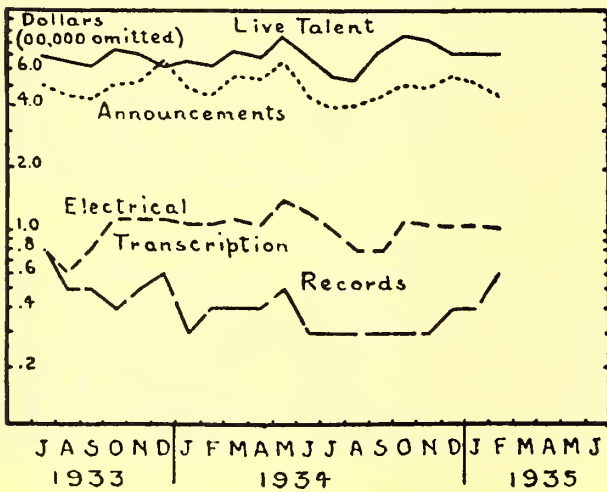
**NON-NETWORK ADVERTISING BY GEOGRAPHICAL DISTRICTS**  
July, 1933, to February, 1935



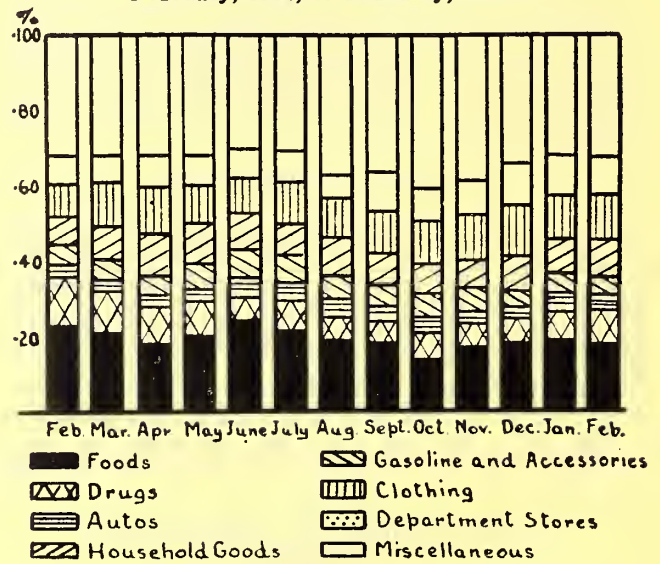
**NATIONAL NON-NETWORK ADVERTISING BY TYPE OF RENDITION**  
July, 1933, to February, 1935



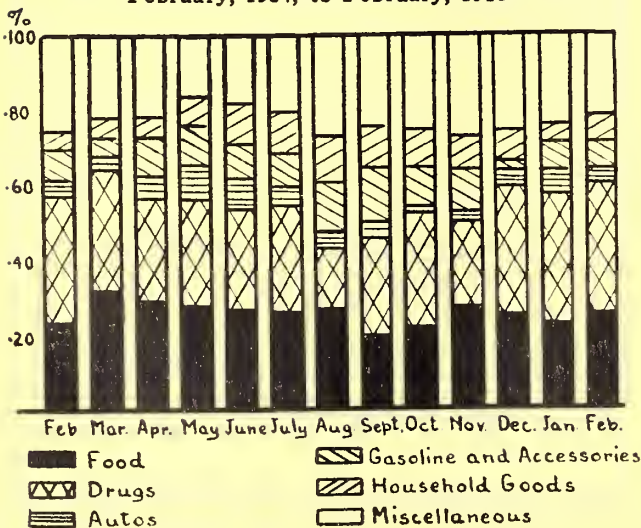
**LOCAL BROADCAST ADVERTISING BY TYPE OF RENDITION**  
July, 1933, to February, 1935



**NATIONAL NETWORK ADVERTISING BY TYPE OF SPONSORING BUSINESS**  
February, 1934, to February, 1935



**NATIONAL NON-NETWORK ADVERTISING BY TYPE OF SPONSORING BUSINESS**  
February, 1934, to February, 1935



**LOCAL ADVERTISING BY TYPE OF SPONSORING BUSINESS**  
February, 1934, to February, 1935





greater than in the preceding February. General retail advertising experienced a gain of 48.2% as compared with the same month of 1934, while department store advertising showed a rise of 70.5% as compared with the same period.

Detailed information regarding the trends in broadcast advertising by various sponsor groups are as follows:

1a. **Amusements.** National non-network volume declined materially compared to January, local volume decreasing 11.4%. General level unchanged as compared to February of last year.

1. **Automotive.** General decline as compared to previous month, though only half as great as in 1934. National network volume 22.8% above same month of last year. Regional volume down 5.0%. National non-network business up 11.5%, and local volume 14.6%.

2. **Gasoline and accessories.** General declines as compared with January, though less than in previous year. Declines as follows: National networks, 8.0%; regional networks, 23.0%; national non-networks, 8.6%; and local 5.0%. National network volume 16.0% under last February. Regional network business up 12.8%. Gains in national non-network and local business 14.2% and 6.4%, respectively.

3. **Clothing.** Local volume decreased 10.0% as compared January, seemingly the usual seasonal amount. National network advertising up 37.8%, with slight gains in regional and national non-network fields. Gains as compared to same month of 1934 are as follows: National networks, 30.0%; regional networks, more than three-fold; national non-network, five-fold; local, 45.8%.

4. **Drugs and pharmaceuticals.** National network volume 1.3% under January level, regional network 19.0% greater, national non-network 11.4% greater, and local up 5.6%. Latter two trends seasonal. National network business 78.3% above last February, regional network volume three and one-half times greater, national non-network up 33.1%, and local down 13.8%.

5. **Toilet goods.** National non-network volume up 10.2% compared January, local up 50.0%. Seasonal trends mainly responsible. National and regional network volume unchanged. National network advertising 21.8% above last February, national non-network 8.8% greater, and local volume 38.0% less.

6. **Foodstuffs.** Compared to preceding month, national network down 11.7%, regional down 34.6%, national non-network up 20.8%, and local volume unchanged. National non-network volume 45.2% above same month 1934, national network level unchanged, local down 22.6%, and regional network down 5.3%.

7. **Beverages.** National network volume down 9.0% as against previous month, national non-network down 26.2%, and local up 18.7%. Seasonal trends mainly responsible. National network volume 5.1% under previous February. Regional advertising 6.0% greater, local volume up 16.1%, and national non-network business down 30.0%.

8. **Confectionery.** National network business down 9.1% during month, local up 18.7%, and national non-network business

double January. Compared February, 1934, national network up 53.1%, national non-network up 13.8%, and local up 141.0%.

9. **Household equipment.** National network volume triple previous month, national non-network up 16.6%, regional down slightly, and local unchanged. Compared February last year, national network 74.3% greater, regional up materially, national non-network double, and local up 38.8%.

10. **Soaps and kitchen supplies.** National network down slightly, national non-network up 16.1%, and local down 10.0%, compared January. Compared February, 1934, national network up 79.8%, national non-network up 36.0%, and local volume unchanged.

11. **Insurance and financial.** National network and local volume 10.0% below previous month. National non-network 17.4% greater. Compared February last year, national network volume 15.8% above, national non-network 44.4% greater, and local up 41.2%.

12. **Radio.** Network volume down 5.8% compared January, and local down one-half. National network volume slightly ahead same month of last year, and local more than double.

13. **Department and general stores.** Local volume down 5.7% compared previous month, national non-network down materially. Compared preceding February, local 70.5% and national non-network 10.0% under.

14. **Tobacco products.** National network volume down 9.0% and national non-network down 18.0%. National network business 24.7% less than previous February, and national non-network advertising 32.7% greater.

15. **Miscellaneous.** National non-network and local volume comparatively unchanged from previous month. National non-network up 14.1% and regional volume up 16.2%. National network business 37.4% above February, 1934, national non-network 18.2% under, and local 5.3% above.

**Retail Advertising.** Retail advertising continued strong during February. The month's volume declined but 10.4% compared to January, a smaller seasonal decrease than usual, and remained at a level 48.2% above February of last year. Automotive volume was 51.3% greater than during the same month of 1934, department store advertising 70.0% greater, clothing store advertising 45.0% above, drug store, beauty parlor, gasoline station and accessory store advertising practically double; furniture store volume up 6.6% and hardware store advertising 70.0% greater.

### General Business Conditions

In spite of some slight recessions, March business activity remained fairly steady. Industrial production increased slightly during the month though averaging a fraction under February. Automotive production continued at a high level. Factory employment and payrolls rose slightly as compared with the preceding month. Freight car loadings remained comparatively unchanged,

## RADIO BROADCAST ADVERTISING BY TYPE OF SPONSORING BUSINESS (February, 1935)

Type of Sponsoring Business	Gross Time Sales				Total
	National Networks	Regional Networks	National Non-network	Local	
1a. Amusements .....	—	—	\$1,618	\$35,635	\$37,253
1-2. Automobiles and Accessories:	—	—	\$1,618	\$35,635	\$37,253
(1) Automobiles .....	\$324,989	\$1,590	51,905	48,408	426,892
(2) Accessories, gas and oils .....	264,333	7,117	96,130	65,910	433,490
3. Clothing and apparel .....	39,522	3,636	25,460	159,420	228,038
4-5. Drugs and toilet goods:	—	—	—	—	—
(4) Drugs and pharmaceuticals .....	696,480	7,486	383,580	94,178	1,181,724
(5) Toilet goods .....	889,623	1,060	73,980	29,992	994,655
6-8. Food products:	—	—	—	—	—
(6) Foodstuffs .....	908,097	14,929	264,630	175,343	1,362,999
(7) Beverages .....	261,927	5,400	25,442	71,995	364,764
(8) Confections .....	176,208	2,350	58,083	9,552	246,193
9-10. Household goods:	—	—	—	—	—
(9) Household equipment and furnishings .....	66,750	4,542	54,066	117,686	243,044
(10) Soap and kitchen supplies .....	244,738	705	36,540	2,450	284,433
11. Insurance and financial .....	44,274	—	27,360	50,942	122,576
12. Radios .....	91,144	—	785	8,520	100,449
13. Retail establishments .....	—	—	2,290	13,977	135,267
14. Tobacco products .....	295,363	1,200	13,243	1,960	311,766
15. Miscellaneous .....	168,984	8,008	219,550	335,060	731,602
<b>Total .....</b>	<b>\$4,472,432</b>	<b>\$58,023</b>	<b>\$1,334,662</b>	<b>\$1,340,028</b>	<b>\$7,205,145</b>

while department store sales experienced a slight increase. Retail trade forecasts were in the main favorable.

Grocery chain store sales in February, the latest month available, were 3.5% greater than during the same month of 1934. Rural retail sales were 12.5% greater, on the same basis, while automobile sales were approximately 60.0% ahead of the same period of last year.

Industrial activity, employment and payrolls are tending to

approximate and in cases to exceed 1931 levels, though the distribution and sale of goods still remains materially below that level.

Prices have remained comparatively steady in recent weeks. The food price index of the Department of Labor was 81.1% of the 1926 level during the third week of March, as compared with 62.4% during the same week of 1932. Prices of general consumers goods during the same period have risen from 71.1% to 77.3% of the 1926 level.

### TOTAL BROADCAST ADVERTISING

1935 Gross Time Sales

Class of Business	1935 Gross Time Sales		Cumulative Jan.-Feb.
	January	February	
National networks	\$4,711,529	\$4,472,432	\$9,183,961
Regional networks	57,916	58,023	115,939
National non-network	1,229,530	1,334,662	2,564,192
Local	1,388,850	1,340,028	2,728,878
<b>Total</b>	<b>\$7,387,825</b>	<b>\$7,205,145</b>	<b>\$14,592,970</b>

### ADVERTISING VOLUME BY MAJOR MEDIA

1935 Gross Time Sales

Advertising Medium	1935 Gross Time Sales		Cumulative Jan.-Feb.
	January	February	
Radio broadcasting	\$7,387,825	\$7,205,145	\$14,592,970
National magazines <sup>1</sup>	9,025,361	9,594,575	18,619,936
National farm papers	307,367	491,097	798,464
Newspapers <sup>2</sup>	36,481,000	35,393,000	71,874,000
<b>Total</b>	<b>\$53,201,553</b>	<b>\$52,683,817</b>	<b>\$105,885,370</b>

<sup>1</sup> National magazine totals for 124 periodicals, prepared by Publishers' Information Bureau, Inc., from which source national farm papers and a portion of national network figures also are taken.

<sup>2</sup> Estimated.

### NON-NETWORK BROADCAST ADVERTISING BY POWER OF STATION

1935 Gross Time Sales

Advertising Medium <sup>1</sup>	1935 Gross Time Sales		Cumulative Jan. Feb.
	January	February	
Over 1,000 watts	\$1,237,090	\$1,406,400	\$2,643,490
250-1,000 watts	1,030,840	920,245	1,951,085
100 watts	350,450	348,045	698,495
<b>Total</b>	<b>\$2,618,380</b>	<b>\$2,674,690</b>	<b>\$5,293,070</b>

<sup>1</sup> Includes principally high-powered regional and clear channel stations ranging from 5 kilowatts upwards in power.

### RETAIL ADVERTISING OVER INDIVIDUAL STATIONS

Type of Sponsoring Business	1934 Gross Time Sales	
	January	February
<b>Automobiles and accessories:</b>		
Automobile agencies and used car dealers	\$84,400	\$56,770
Gasoline stations, garages, etc.	60,000	50,020
Clothing and apparel shops	177,800	162,520
<b>Drugs and toilet goods:</b>		
Drug stores	20,770	13,960
Beauty parlors	9,110	9,588
<b>Food products:</b>		
Grocery stores, meat markets, etc.	38,638	42,973
Restaurants and eating places	16,020	15,410
Beverage retailers	10,336	3,418
Confectionery stores	1,720	2,145
<b>Household goods:</b>		
Household equipment retailers	29,300	29,432
Furniture stores	72,486	73,198
Hardware stores	9,328	7,650
Radio retailers	15,957	8,995
Department and general stores	148,205	135,267
Tobacco shops	614	150
Miscellaneous	71,345	75,180
<b>Total</b>	<b>\$766,029</b>	<b>\$686,676</b>

### NON-NETWORK BROADCAST ADVERTISING BY GEOGRAPHICAL DISTRICTS

1935 Gross Time Sales

Geographical District	1935 Gross Time Sales		Cumulative Jan.-Feb.
	January	February	
<b>New England-Middle</b>			
Atlantic Area	\$691,300	\$659,750	\$1,351,050
<b>South Atlantic-South</b>			
Central Area	401,460	418,060	819,520
North Central Area	939,790	1,052,400	1,992,190
Pacific and Mountain Area	585,830	544,480	1,130,310
<b>Total</b>	<b>\$2,618,380</b>	<b>\$2,674,690</b>	<b>\$5,293,070</b>

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

1935 Gross Time Sales

Type of Rendition	National Non-network		Local		Total		Cumulative Jan.-Feb.
	January	February	January	February	January	February	
Electrical transcriptions	\$376,480	\$419,590	\$114,180	\$104,931	\$490,660	\$524,521	\$1,015,181
Live talent programs	597,685	615,923	723,735	717,836	1,321,420	1,333,759	2,655,179
Records	3,850	9,340	43,500	63,643	47,350	72,983	120,333
Announcements	251,515	289,809	507,435	453,618	758,950	743,427	1,502,377
<b>Total</b>	<b>\$1,229,530</b>	<b>\$1,334,662</b>	<b>\$1,388,850</b>	<b>\$1,340,028</b>	<b>\$2,618,380</b>	<b>\$2,674,690</b>	<b>\$5,293,070</b>