

The National Association of Broadcasters

NATIONAL PRESS BUILDING * * * * * WASHINGTON, D. C.
PHILIP G. LOUCKS, Managing Director

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BROADCAST ADVERTISING IN MARCH

Developments of the Month

BRROADCAST advertising in March reached what is probably the highest level attained by the medium in any single month. Gross time sales totalled \$8,287,740 and were greater than for any period since the establishment of the NAB summaries of advertising volume.

General seasonal increases were experienced during the month. Total advertising volume was 15.0% greater than in February. National network volume increased, 10.8%; regional networks, 32.7%; national non-network business, 10.0%; and local broadcast advertising, 35.5%.

Comparison with Previous Year

Total broadcast advertising volume in March was 18.0% greater than for the same month of the previous year. National network advertising showed an increase of 23.0%, regional networks 16.1%, and local volume 25.7%. National non-network advertising, alone, decreased. Gross time sales in this field were 2.5% below those of March, 1934.

Comparison with Other Media

Compared with the 15.0% rise in broadcast advertising as against February, national magazines increased 28.6%, newspapers by a similar amount, and national farm papers, 9.0%. Part of this increase was seasonal. National magazine volume was 12.3% ahead of March, 1934, newspaper advertising 11.2% greater, and national farm paper advertising 7.6% above last March.

Non-network Trends

Increased network volume is reflected in the fact that non-network advertising over stations of more than 1,000 watts in power increased but 9.0% as compared with Feb-

ruary, whereas that of stations in the 250-1,000-watt group rose 40.6% and that of the 100-watt class increased 29.7%. The non-network advertising of all classes of stations was approximately 11.0% greater than in March, 1934.

Heaviest increases in non-network volume during the month occurred in the New England-Middle Atlantic Area, where gross time sales rose 35.4%. Southern volume rose 20.9%, Mountain and Pacific non-network advertising increased 21.3%, and Mid-western volume 14.8%. Compared with March, 1934, Southern non-network advertising was 28.5% greater, Mid-western 8.0%, and Mountain and Pacific volume 47.1% greater. New England-Middle Atlantic non-network advertising was 9.6% below last March, undoubtedly due to the rise in network advertising.

Practically all types of rendition experienced increased volume during the month. Electrical transcription volume, however, was below the March, 1934, level by 12.3% in the national non-network field and just equalled the previous year in local broadcast advertising. Live talent and announcement advertising in the national non-network field were 2.2% and 6.4% above last March, respectively. In the local field, increases over the same month of 1934 were as follows: Live talent 31.2%, announcements 18.9%, and records 20.0%.

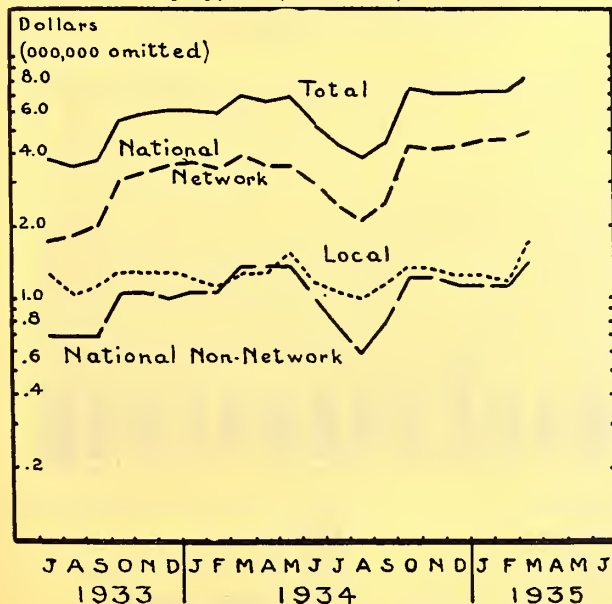
Sponsor Trends in March

Principal increases as compared with February were recorded in national non-network and local automotive advertising, which rose 123.0% and 54.2%, respectively; local clothing advertising, which increased 58.7%; national non-network toilet goods volume, which gained 31.1%; and national network and local house furnishings advertising. Network advertising of this type practically doubled the previous month's level, while local advertising increased 70.0%.

There were several notable gains as compared with March, 1934. All forms of automotive advertising showed

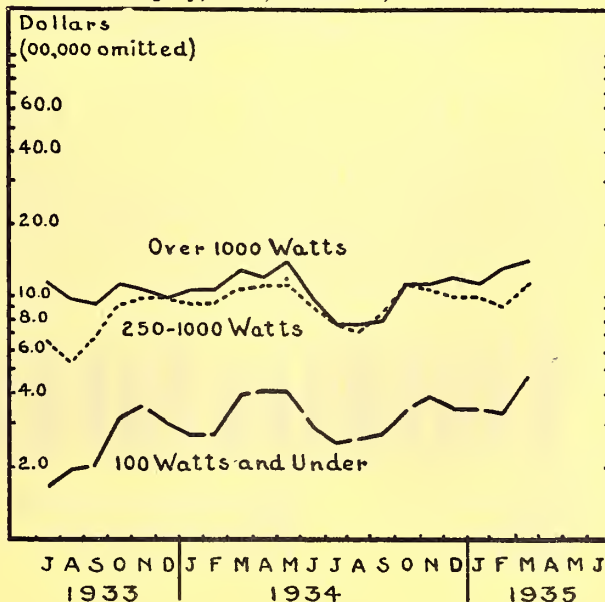
RADIO BROADCAST ADVERTISING VOLUME

July, 1933, to March, 1935



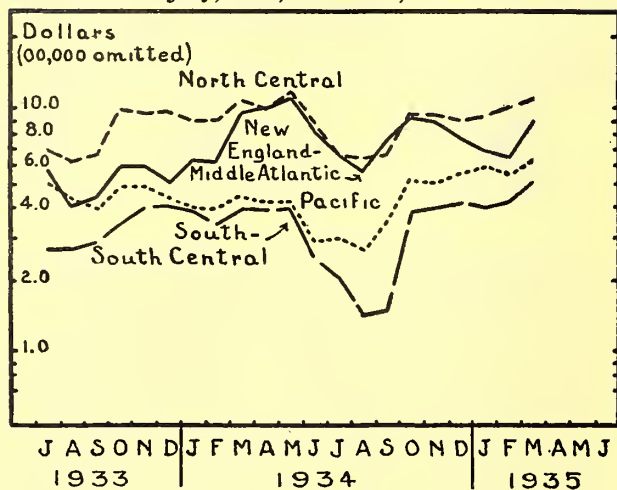
NON-NETWORK ADVERTISING BY STATION POWER

July, 1933, to March, 1935



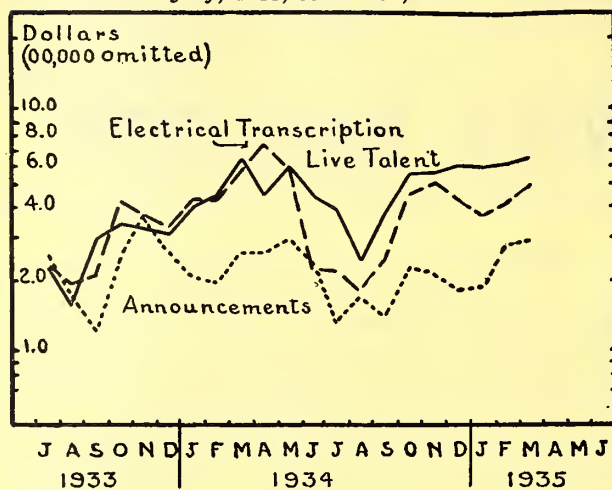
NON-NETWORK ADVERTISING BY GEOGRAPHICAL DISTRICTS

July, 1933, to March, 1935



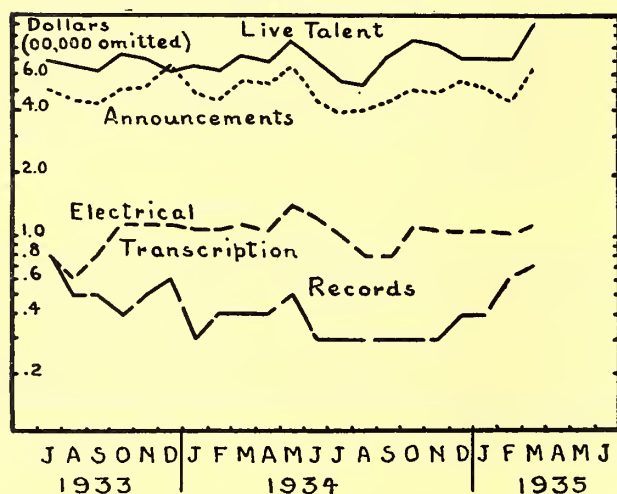
NATIONAL NON-NETWORK ADVERTISING BY TYPE OF RENDITION

July, 1933, to March, 1935



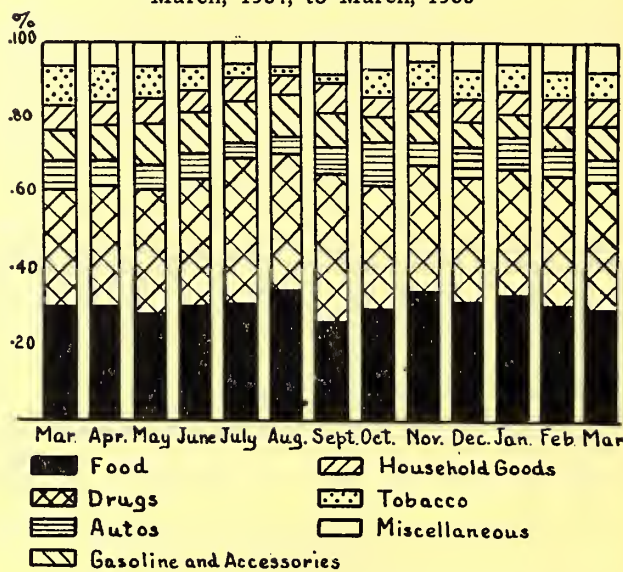
LOCAL BROADCAST ADVERTISING BY TYPE OF RENDITION

July, 1933, to March, 1935



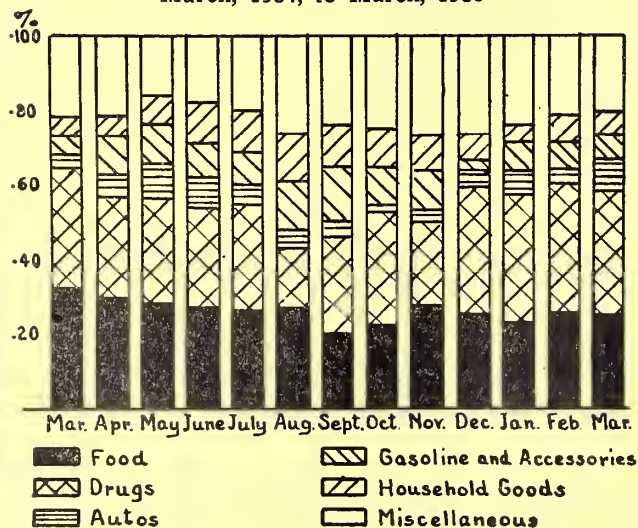
NATIONAL NETWORK ADVERTISING BY TYPE OF SPONSORING BUSINESS

March, 1934, to March, 1935



NATIONAL NON-NETWORK ADVERTISING BY TYPE OF SPONSORING BUSINESS

March, 1934, to March, 1935



LOCAL ADVERTISING BY TYPE OF SPONSORING BUSINESS

March, 1934, to March, 1935



increases. Network volume recorded a gain of 26.0%, national non-network advertising one of 161.3%, and local advertising an increase of 80.0%. Other increases were as follows: Local clothing, 64.2%; network confectionery, 54.4%; network household equipment, 43.7%; national non-network advertising in the same field, 31.7%; and local, 70.0%; network soap and kitchen supplies, 47.9%; and department store advertising, 38.7%.

Detailed Data on Sponsor Trends

1a. **Amusements.** National non-network unchanged and local up 25.7% as compared to February. National non-network doubled and local 19.8% above last March.

1. **Automotive.** National network unchanged as against February, regionals 43.0% ahead, national non-network 123.0% above, and local 54.2% above. National network 26.0% above March, 1934; national non-network 161.3% ahead, and local 80.0% above.

2. **Gasoline and accessories.** National networks 28.0% above previous month, regionals 24.2%, local 10.0%, and national non-network 6.2% lower. Compared with last March, national network volume unchanged, regional materially lower, national non-network advertising 29.0% greater, and local 10.0% below.

3. **Clothing.** National network volume doubled as against February, regional declined one-third, national non-network down 4.0%, and local up 58.7%. Compared to the same month of 1934, national network volume more than double, regional advertising nearly the same, national non-network up 15.2%, and local up 64.2%.

4. **Drugs and pharmaceuticals.** Network volume 4.1% above February, national non-network 3.0%, and local 8.9%. Compared to last March, national network advertising 7.9% lower, regional up slightly, national non-network up 2.0%, and local down 29.8%.

5. **Toilet goods.** National networks 5.0% above February, regional volume up materially, national non-network up 31.1%, and local down 20.0%. National networks 10.7% above last March, regional up materially, national non-network unchanged, and local up 20.0%.

6. **Foodstuffs.** National network volume 9.7% higher than preceding month, regional up 50.0%, national non-network up 3.0%, and local 23.4%. Compared with last March, national networks up 25.3%, regional up 29.6%, national non-network down 28.0%, and local down 5.6%.

7. **Beverages.** National networks up 8.7% as against February, national non-network 24.0% higher, and local unchanged. National networks unchanged as compared with same month of last year, regional down, national non-network down 42.8%, and local down 12.6%.

8. **Confectionery.** National networks increased 9.0% during the month, national non-network 25.7%, and local 11.0%. Compared with previous March, national network volume greater by 54.4%, regional advertising up materially, national non-network up 10.0%, and local volume tripled.

9. **Household equipment.** National network volume double February, national non-network unchanged and local up 70.0%. National network advertising 43.7% greater than during March, 1934, regional 67.0%, national non-network 31.7%, and local 70.0%.

10. **Soaps and kitchen supplies.** National networks 24.8% ahead of February, regional increased materially, national non-network up 27.7%, and local doubled. As compared with last March, national networks up 47.9%, regional up materially, national non-network 70.0% higher, and local 33.3% above.

11. **Financial.** National network volume 9.0% below February, national non-network half as great, and local up 33.3%. National network advertising 36.1% below previous March, national non-network 21.4% below, and local 21.5% above.

12. **Radio.** National network slightly ahead of February, national non-network tripled, and local up 57.7%. Networks more than double last March, national non-network up materially, and local up 48.8%.

13. **Department and general stores.** Advertising 14.0% above February and 38.7% greater than during the same month of last year.

14. **Tobacco products.** National network advertising 8.0% above preceding month, regional volume up eight-fold, national non-network more than doubled, and local up materially. As compared with last March, network volume 29.0% greater, national non-network volume up six-fold, and local up materially.

15. **Miscellaneous.** National networks 22.9% above February, regional unchanged, national non-network down slightly, and local up 51.8%. Compared to March, 1934, national network volume up 45.0%, national non-network business down approximately one-third, and local up 42.0%.

Retail Advertising

General retail broadcast advertising increased 36.6% as compared with February, and was 65.2% greater than during March of the preceding year. Principal gains during the month were in the automotive, accessory, clothing, and house furnishing fields.

Automobile dealer advertising over the radio was double that of last March, while accessory and gasoline retail advertising rose two and one-half times. Clothing and apparel store advertising was 67.3% greater than during the same month of 1934. Household equipment retail advertising was 46.0% greater than during the previous March, furniture store advertising doubled, and hardware store volume experienced a six-fold increase. Department store advertising was 38.7% greater than last March.

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

Type of Sponsoring Business	Gross Time Sales				Total
	National Networks	Regional Networks	National Non-network	Local	
1a. Amusements	—	—	\$1,370	\$44,445	\$45,815
1-2. Automobiles and Accessories:					
(1) Automobiles	\$318,945	\$2,250	115,740	73,734	510,669
(2) Accessories, gas and oils	339,450	8,789	89,995	71,890	510,124
3. Clothing and apparel	75,956	2,499	24,435	252,836	355,726
4-5. Drugs and toilet goods:					
(4) Drugs and pharmaceuticals	728,091	1,098	395,850	102,915	1,227,954
(5) Toilet goods	936,164	7,950	96,870	23,855	1,064,839
6-8. Food products:					
(6) Foodstuffs	988,006	21,488	273,560	215,740	1,498,794
(7) Beverages	284,663	—	32,347	72,240	389,250
(8) Confections	193,116	2,940	73,134	10,440	279,630
9-10. Household goods:					
(9) Household equipment and furnishings	116,169	1,468	54,720	199,405	371,762
(10) Soap and kitchen supplies	281,207	4,173	46,300	4,760	336,440
11. Insurance and financial	41,865	410	13,645	67,720	123,640
12. Radios	95,051	—	2,850	13,420	111,321
13. Retail establishments	—	—	6,930	146,800	153,730
14. Tobacco products	321,443	8,210	31,654	7,205	368,512
15. Miscellaneous	203,119	16,085	211,590	508,740	939,534
Total	\$4,923,245	\$77,360	\$1,470,990	\$1,816,145	\$8,287,740

General Business Conditions

There has been little change in general business conditions during April from those of the preceding month. The *New York Times* composite index of business activity remained at approximately the same level, though declining toward the close of April. Automobile production gained slightly prior to the present strike outbreaks.

TOTAL BROADCAST ADVERTISING

1935 Gross Time Sales

Class of Business	February	March	Cumulative Jan.-March
National networks.....	\$4,472,432	\$4,923,245	\$14,107,206
Regional networks	58,023	77,360	193,299
National non-networks	1,334,662	1,470,990	4,035,182
Local	1,340,028	1,816,145	4,545,023
Total	\$7,205,145	\$8,287,740	\$22,880,710

ADVERTISING VOLUME BY MAJOR MEDIA

1935 Gross Time and Space Sales

Advertising Medium	February	March	Cumulative Jan.-March
Radio broadcasting.....	\$7,205,145	\$8,287,740	\$22,880,710
National magazines ¹	9,594,575	12,348,858	30,968,794
National farm papers.....	491,097	534,800	1,333,264
Newspapers ²	35,393,000	45,600,000	117,474,000
Total	\$52,683,817	\$66,771,398	\$172,656,768

¹ Based on 124 magazines compiled by Publishers Information Bureau, Inc., from which source national farm papers and network figures also are taken.

² Estimated.

NON-NETWORK ADVERTISING BY POWER OF STATION

1935 Gross Time Sales

Power of Station	February	March	Cumulative Jan.-March
Over 1,000 watts.....	\$1,406,400	\$1,543,465	\$4,186,955
250-1,000 watts.....	920,245	1,293,670	3,244,755
100 watts	348,045	450,000	1,148,495
Total	\$2,674,690	\$3,287,135	\$8,580,205

NON-NETWORK BROADCAST ADVERTISING BY TYPE OF RENDITION

Type of Rendition	National Non-network		Local		Total		Cumulative Jan.-Mar.
	February	March	February	March	February	March	
Electrical transcriptions.....	\$419,590	\$504,675	\$104,931	\$122,280	\$524,521	\$626,955	\$1,642,136
Live talent programs.....	615,923	672,400	717,836	960,896	1,333,759	1,633,296	4,288,475
Records	9,340	4,476	63,643	71,334	72,983	75,810	196,143
Announcements	289,809	289,439	453,618	661,635	743,427	951,074	2,453,451
Total	\$1,334,662	\$1,470,990	\$1,340,028	\$1,816,145	\$2,674,690	\$3,287,135	\$8,580,205

Freight car loadings, indicative of trade movement, increased slightly. Construction volume remained at about the same level as March, when a seasonal increase should have occurred. Security markets showed gains in both stock and bond prices. Rural retail trade was 22.5% above March, 1934, and 15.0% ahead of last year for the first quarter of the year. Grocery chain store sales were the same as during March of last year.

NON-NETWORK ADVERTISING BY GEOGRAPHICAL DISTRICTS

1935 Gross Time Sales

Geographical District	February	March	Cumulative Jan.-March
New England-Middle Atlantic Area	\$659,750	\$894,000	\$2,245,050
South Atlantic-South Central Area	418,060	515,560	1,335,080
North Central Area.....	1,052,400	1,217,770	3,209,960
Pacific and Mountain Area....	544,480	659,805	1,790,115
Total	\$2,674,690	\$3,287,135	\$8,580,205

RETAIL RADIO ADVERTISING OVER INDIVIDUAL STATIONS

Type of Sponsoring Business	1935 Gross Time Sales	
	February	March
Automobiles and accessories:		
Automobile agencies and used car dealers...	\$56,770	\$74,450
Gasoline stations, garages, etc.....	50,020	74,265
Clothing and apparel shops.....	162,520	249,000
Drugs and toilet goods:		
Drug stores.....	13,960	15,700
Beauty parlors.....	9,588	11,285
Food products:		
Grocery stores, meat markets, etc.....	42,973	46,400
Restaurants and eating places	15,410	16,200
Beverage retailers	3,418	3,375
Confectionery stores	2,145	2,600
Household goods:		
Household equipment retailers.....	29,432	54,245
Furniture stores.....	73,198	109,270
Hardware stores	7,650	19,640
Radio retailers	8,995	13,554
Department and general stores.....	135,267	153,730
Tobacco shops	150	4,050
Miscellaneous	75,180	92,620
Total	\$686,676	\$940,384

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BROADCAST ADVERTISING: FIRST QUARTER, 1935

Developments of the Period

Broadcast advertising gained materially during the first quarter of the current year. Increased volume of the early winter was continued and added to. Total gross time sales of the medium during the first three months of the year were \$22,880,710, a gain of 19.6% over the corresponding quarter of 1934.

National network volume showed a gain of 23.9% as compared to the first three months of 1934. Other gains were as follows: regional networks, 10.4%; national non-network advertising, 10.1%; and local broadcast advertising, 13.3%. The gain in the local field is especially encouraging since, at the outset of the season, broadcast advertising of this type lagged materially behind the preceding year's level.

A comparison of gross time sales of various portions of the broadcasting structure during the first quarter of 1934 and 1935, respectively, is found in Table I.

TABLE I

TOTAL BROADCAST ADVERTISING (First Quarter)

Class of Business	Gross Time Sales	
	1934	1935
National networks.....	\$11,365,157	\$14,107,206
Regional networks.....	175,026	193,299
National non-network.....	3,664,591	4,035,182
Local	3,943,995	4,545,023
Total	\$19,148,769	\$22,880,710

The swiftly growing volume of national network advertising during the first quarter of 1934, as well as during the three preceding months, has resulted in changes in the proportion of total advertising volume represented by various parts of the medium. Whereas, during 1934, national network advertising constituted 58.5% of total gross time sales, it accounted for 61.3% of the volume of the medium during the first three months of the current year.

The proportion represented by regional networks remained comparatively unchanged, national non-network advertising dropped from 18.6% of total medium revenues to 17.3%, while local broadcast advertising declined from 22.0% to 20.6%.

Comparison with Other Media

Compared to the 19.6% gain on the part of broadcast advertising over the corresponding quarter of 1934, national magazine advertising rose 20.6%, newspaper advertising 7.8% and national farm paper advertising 6.0%. Advertising revenues for the various media during the periods under consideration are found in Table II.

TABLE II

ADVERTISING VOLUME BY MAJOR MEDIA (First Quarter)

Advertising Medium	Gross Time and Space Sales	
	1934	1935
Radio broadcasting.....	\$19,148,769	\$22,880,710
National magazines.....	25,695,372	30,968,794
National farm papers.....	1,257,590	1,333,264
Newspapers	108,743,000	117,474,000
Total	\$154,844,731	\$172,656,768

Non-network Advertising Trends

Encouragement is found for the general economic progress of broadcasting in the marked rise in advertising on local stations in the 100 watt class. Gross time sales of this group were 22.0% ahead of those for the first quarter of the preceding year. Stations of from 250 to 1,000 watts in power experienced an increase of 5.5% in non-network revenues while those over 1,000 watts in power gained 14.0%.

Non-network advertising by power of station is found in Table III.

TABLE III

NON-NETWORK ADVERTISING BY POWER OF STATION (First Quarter)

Power of Station	Gross Time Sales	
	1934	1935
Over 1,000 watts.....	\$3,593,448	\$4,186,955
250-1,000 watts.....	3,072,552	3,244,755
100 watts.....	942,586	1,148,495
Total	\$7,608,586	\$8,580,205

Marked difference existed in the rise of non-network advertising in various parts of the country. Gross time sales in the New England-Middle Atlantic area remained practically unchanged from those of the preceding year. Increased network advertising, concentrated in part in this section and reducing available time for non-network business, undoubtedly was at least partly responsible for this trend.

Non-network advertising in the South Central-South Atlantic district increased 16.3% as compared to the same period of 1934. Mid-western non-network volume rose 8.1%, and Mountain and Pacific broadcast advertising gained 42.6%. Details in this field are found in Table IV.

TABLE IV

NON-NETWORK ADVERTISING BY GEOGRAPHICAL DISTRICTS (First Quarter)

Geographical District	Gross Time Sales	
	1934	1935
New England-Middle Atlantic Area..	\$2,240,608	\$2,245,050
South Atlantic-South Central Area..	1,147,130	1,335,080
North Central Area.....	2,966,217	3,209,960
Pacific and Mountain Area.....	1,254,631	1,790,115
Total	\$7,608,586	\$8,580,205

Advertising by Types of Rendition

The trend in the non-network field by types of rendition is particularly interesting. Electrical transcription advertising fared relatively poorly in both the national and local fields. National non-network advertising of this type was 10.7% lower than during the first quarter of last year, while local transcription volume experienced a gain of but 2.0%.

The outstanding gains of the period were made in the live talent field. National non-network volume of this type rose 25.0% as compared to the first three months of 1934, while local broadcast advertising employing talent in studio programs increased 20.1%. Announcement volume rose 20.3% in the national non-network field and 7.8% in the local field. Records declined materially in national non-network advertising and increased 71.8% in the local field.

Details regarding the volume of broadcast advertising employing various types of rendition during the first quarter of the current and preceding years are found in Table V.

TABLE V
NON-NETWORK BROADCAST ADVERTISING BY TYPE OF RENDITION
(First Quarter)

<i>Type of Rendition</i>	<i>National Non-network</i>		<i>Gross Time Sales</i>		<i>Total</i>	
	<i>1934</i>	<i>1935</i>	<i>Local</i>	<i>1934</i>	<i>1934</i>	<i>1935</i>
Electrical transcriptions.....	\$1,439,825	\$1,300,745		\$334,429	\$1,774,254	\$1,642,136
Live talent programs.....	1,510,498	1,886,008		1,999,897	3,510,395	4,288,475
Records	22,910	17,666		103,789	126,699	196,143
Announcements	691,358	830,763		1,505,880	2,197,238	2,453,451
Total	\$3,664,591	\$4,035,282		\$3,943,995	\$7,608,586	\$8,580,205

A comparison of the relative proportion of various types of rendition utilized in non-network broadcasting during the first quarter of 1934 and 1935 respectively, is found in Table VI.

TABLE VI
RELATIVE PROPORTION OF VARIOUS TYPES OF RENDITION USED IN NON-NETWORK BROADCAST ADVERTISING
(First Quarter, 1934-1935)

<i>Type of Rendition</i>	<i>Percentage represented by rendition type</i>		<i>Percentage represented by rendition type</i>	
	<i>National</i>	<i>Non-network</i>	<i>Local</i>	<i>Local</i>
	<i>1934</i>	<i>1935</i>	<i>1934</i>	<i>1935</i>
Electrical transcriptions...	39.0%	32.1%	8.7%	7.5%
Live talent programs.....	41.3%	44.2%	50.7%	52.8%
Records	6%	4%	2.6%	3.9%
Announcements	20.1%	23.3%	38.0%	35.8%
Total	100.0%	100.0%	100.0%	100.0%

Trends in Sponsorship

The outstanding developments in the volume of broadcast advertising sponsored by different product and service groups are as follows:

National network automotive advertising increased 43.5% as compared with that of the first quarter of last year. National non-network and local volume increased only slightly in spite of the March rise, advertising of this type coming later in 1935 than it did in the preceding year.

Clothing advertising rose 80.0% in the network field, doubled in the national non-network field and rose 54.0% in the local field.

National network food advertising rose 31.7%, confectionery advertising 52.0% and soap and kitchen supply volume 62.8%. National non-network advertising in the last-mentioned field increased 78.1% as compared with the corresponding quarter of 1934.

National non-network household equipment advertising rose 47.6%, while local advertising increased 60.0% in this field. Department and general store advertising increased 58.6%.

The gross time sales of various sponsoring product and service groups during the first quarter of the current year are found in Table VII.

TABLE VII
RADIO BROADCAST ADVERTISING BY TYPE OF SPONSORING BUSINESS
(First Quarter, 1935)

<i>Type of Sponsoring Business</i>	<i>Gross Time Sales</i>				<i>Total</i>
	<i>National Networks</i>	<i>Regional Networks</i>	<i>National Non-network</i>	<i>Local</i>	
1a. Amusements	—	—	\$13,938	\$119,845	\$133,783
1-2. Automobiles and accessories:					
(1) Automobiles	\$1,015,043	\$6,490	239,275	193,652	1,454,460
(2) Accessories, gas and oils.....	890,824	25,288	291,365	207,218	1,414,695
3. Clothing and apparel.....	144,070	9,612	74,245	587,066	814,993
4-5. Drugs and toilet goods:					
(4) Drugs and pharmaceuticals.....	2,130,879	14,895	1,123,130	286,226	3,555,130
(5) Toilet goods.....	2,739,139	10,070	260,895	73,547	3,083,651
6-8. Food products:					
(6) Foodstuffs	2,911,488	59,646	748,090	568,823	4,288,047
(7) Beverages	836,024	5,400	91,629	207,115	1,140,168
(8) Confections	564,197	5,540	158,342	26,767	754,846
9-10. Household goods:					
(9) Household equipment and furnishings.....	198,281	10,919	154,556	435,327	799,083
(10) Soap and kitchen supplies.....	779,979	4,878	114,380	9,860	909,097
11. Insurance and financial.....	134,700	410	64,373	175,327	374,810
12. Radios	282,898	—	3,835	38,505	325,238
13. Retail establishments.....	—	—	16,470	420,732	437,202
14. Tobacco products.....	939,434	9,410	60,732	10,585	1,020,161
15. Miscellaneous	540,250	30,741	619,927	1,184,428	2,375,346
Total	\$14,107,206	\$193,299	\$4,035,182	\$4,545,023	\$22,880,710

A detailed analysis of the trends in these various fields is as follows:

1a. *Amusements.* A very slight increase over the same period of last year.

1. *Automotive.* National network volume showed an increase of 43.5% over the first quarter of 1934. Regional networks advertising gained slightly, national non-network advertising rose 5.3%, and local advertising increased 5.2%.

2. *Gasoline and accessories.* Network volume declined 6.6%. National non-network advertising rose 1.8%, and local dropped 8.0%.

3. *Clothing.* National network advertising rose 80.0%, regional volume tripled, national non-network advertising doubled, and local advertising increased 54.0%.

4. *Drugs and pharmaceuticals.* National network advertising dropped 11.8%, regional volume doubled, national non-network volume gained 25.6%, and local advertising decreased 25.2%.

5. *Toilet goods.* National network advertising increased 14.5%, national non-network rose 10.7%, and local broadcast advertising dropped 14.4%. The regional network advertising in this field is new.

6. *Foodstuffs.* Network advertising increased 31.7%, regional network advertising 22.0%, and national non-network volume 2.0%.

Local broadcast advertising dropped 19.1% as compared with the same period of 1934.

7. *Beverages.* National network volume remained practically unchanged, with national non-network advertising declining 14.8% and local volume gaining 5.0%.

8. *Confectionery.* Network advertising increased 52.0%. Regional network advertising in this field increased very materially. National non-network advertising dropped 15.0%, and local broadcast advertising tripled.

9. *Household equipment.* Network volume increased 13.8%. Regional network advertising again was new. National non-network advertising rose 47.6%, and local volume rose 60.0%.

10. *Soap and kitchen supplies.* National networks increased their advertising in this field by 62.8% and national non-network volume rose 78.1%. Local advertising declined materially. Regional volume again constitutes a new sponsor for this field as far as any marked quantity is concerned.

11. *Insurance and financial.* There was a slight increase in national network volume. National non-network advertising rose 42.2%, and local 48.3%.

12. *Radio.* National network volume more than doubled, with local increasing practically to the same degree.

13. *Department and general stores.* Advertising of this type rose 58.6% as compared with the first quarter of 1934.

14. *Tobacco products.* National network advertising decreased 24.6%. Regional network advertising rose materially, while national non-network advertising tripled.

15. *Miscellaneous.* Network volume rose 38.7%, and local advertising increased 19.1%. National non-network advertising dropped 20.3%.

Retail Advertising

General retail advertising gained 48.5% as compared with the same quarter of 1934. Principal gains were as follows: automobile dealer advertising, 21.8%; gasoline and accessories more than

doubled; clothing stores, 50.1%; household equipment retailers, 35.5%; furniture stores, 86.0%; and hardware store advertising more than doubled. Retail advertising during the first quarter of the current year is found in Table VIII.

TABLE VIII
RETAIL RADIO ADVERTISING OVER
INDIVIDUAL STATIONS
(First Quarter, 1935)

<i>Type of Sponsoring Business</i>	<i>Gross Time Sales</i>
Automobiles and accessories:	
Automobile agencies and used car dealers.....	\$215,620
Gasoline stations, garages, etc.....	184,285
Clothing and apparel shops.....	589,320
Drugs and toilet goods:	
Drug stores	50,430
Beauty parlors.....	29,983
Food products:	
Grocery stores, meat markets, etc.....	128,011
Restaurants and eating places.....	47,630
Beverage retailers	17,129
Confectionery stores.....	6,465
Household goods:	
Household equipment retailers.....	112,977
Furniture stores.....	254,954
Hardware stores.....	36,618
Radio retailers.....	38,506
Department and general stores.....	437,202
Tobacco shops.....	4,814
Miscellaneous	239,145
Total	\$2,393,089