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BROADCAST ADVERTISING IN 1935

Highlights of the Year

Broadcast advertising volume reached a new high level during 1935. Gross time sales of the medium totalled \$87,523,848, a gain of 20.0% over the preceding year.

The most pronounced gains were experienced in the regional network and national non-network fields. Following a slight recession in 1934, local broadcast advertising rose materially and more than offset the losses of the previous year.

Local stations continued to show the greatest gains, while non-network business rose most rapidly in the southern and far western parts of the country.

Live talent programs, produced in station studios, showed the greatest increase of the year in the non-network field, due principally to the marked gain in the use of this type of rendition by national advertisers in their non-network broadcasting. Transcription volume experienced the most pronounced rise in the local broadcast advertising field.

Gains in broadcast advertising volume were general throughout all product and service groups employing the medium. Automotive, clothing, housefurnishing and tobacco advertising gained particularly. Financial advertising alone experienced any recession, declining 0.2% from the previous year's level. A general tendency toward more diversified sponsorship manifested itself throughout the year, as is evidenced partly by the statistical summaries as to radio advertising sponsorship and even more by examination of individual station accounts.

Total Broadcast Advertising

The volume of broadcast advertising placed over the various subdivisions of the medium during 1934 and 1935 is presented in Table I.

TABLE I

TOTAL BROADCAST ADVERTISING

Class of Business	Gross Time Sales	
	1934	1935
National networks	\$42,647,081	\$50,067,686 ¹
Regional networks	717,117	1,110,739
National non-network	13,541,770	17,063,688
Local	15,981,201	19,281,735
Total	\$72,887,169	\$87,523,848

¹ This includes the Mutual Network formed during the year.

Total broadcast advertising volume in 1935 increased 20.0% over the preceding year's level. It is particularly interesting to note that the rate of increase was maintained fairly steadily throughout the entire year.

National network advertising increased 17.4%. Regional network volume experienced the greatest gain over the preceding year, rising 54.7%. National non-network advertising rose 26.0%. Following a decrease in 1934 of 3.2% from the estimated previous year's level, local broadcast advertising rose materially during the year. Broadcast advertising of this type registered a gain of 20.6% over 1934.

It is interesting to note that gross time sales of the medium exceeded estimated 1931 volume by 25.0%, and the estimated depression low of the medium, \$57,000,000 in 1933, by 53.5%.

National network volume exceeded 1933 by 59.0%. Data are available with regard to other portions of the medium only for the latter half of that year. A comparison of revenues for that period with those of the corresponding months of 1935 showed the following

gains: Regional networks 160.4%, national non-network business 66.3%, and local broadcast advertising 22.0%.

Composition of Broadcast Advertising

The composition of the total broadcast advertising has remained very much the same as during the preceding year. National network advertising accounted for 57.2% of the industry's gross revenues during the year under review as compared to 58.5% in 1934, 55.2% in 1933, and an estimated 51.2% in 1931. The increasing proportion of total volume represented by national network advertising was due to the more rapid recovery of this portion of the medium from the effects of the depression. The situation over the past two years, however, seems to have become fairly well stabilized.

The marked rise in regional network volume is reflected in the growing proportion of total radio advertising which it represents. Regional network advertising accounted for 1.2% of total gross time sales in 1935 as compared to 0.9% in 1934 and 0.7% in 1933. National non-network advertising represented 19.5% of the gross volume of the medium in 1935 as against 18.6% in 1934 and 17.5% in 1933.

The relative importance of local broadcast advertising remained unchanged during the past year as compared with 1934. Advertising of this type accounted for 22.1% of total volume in 1935.

Comparison with Other Media

Broadcast advertising continued to make the most rapid forward strides of any medium during 1935. Compared to the 20.0% increase in gross time sales, national magazine volume rose 5.9% as against 1934. National farm paper advertising increased 7.0%, while newspaper lineage increased 5.8%. Newspaper department store advertising increased 3.4% as compared to a rise of 30.9% in radio department store volume.

Advertising volume by major media during the year of 1935 is found in Table II.

TABLE II

ADVERTISING BY MAJOR MEDIA

Advertising Medium	Gross Time and Space Sales	
	1934	1935
Radio broadcasting	\$72,887,169	\$87,523,848
National magazines ¹	116,268,492	123,093,289
National farm papers ²	5,200,067	5,565,059
Newspapers ²	485,481,718	517,513,000
Total	\$679,837,446	\$733,695,196

¹ Publishers' Information Bureau.

² Estimated.

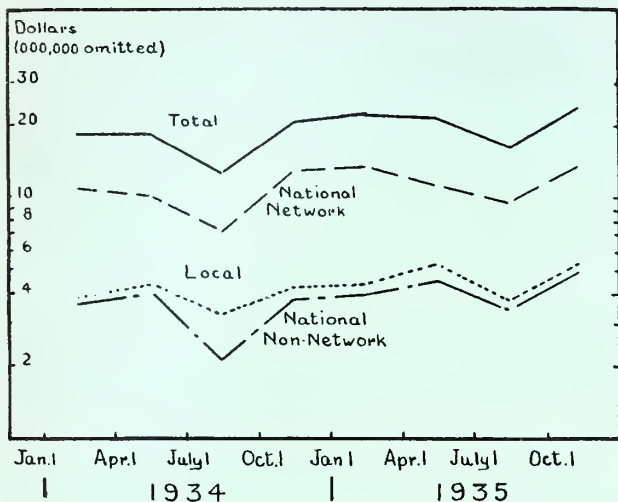
Non-network Broadcast Advertising

Non-network advertising rose 23.3% as compared to the preceding year. Local station volume continued to show the strength exhibited during the latter portion of 1934 and experienced a gain of 31.9% over that year. Clear channel and high-powered regional station non-network advertising increased 23.6% as compared to 1934, while regional station volume rose 19.9%.

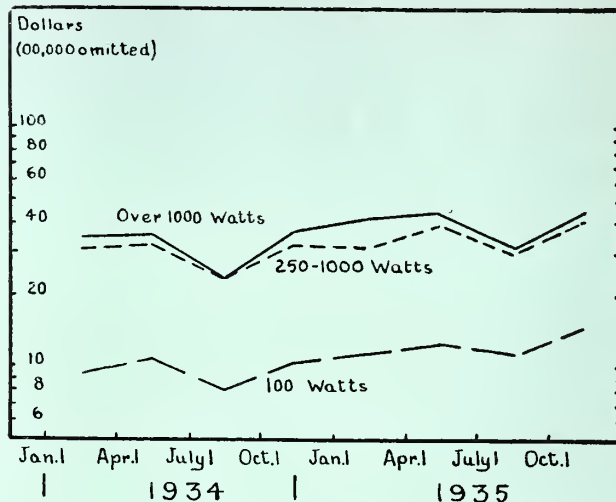
When comparison is made with the latter half of 1933, representing the depression low point of the industry, regional and local station non-network advertising is revealed to have made the most pronounced gains. Regional station non-network volume for the corresponding period of 1935 exceeded the 1933 level by 49.3%, while local station volume rose 76.5%. Clear channel and high-powered regional station non-network advertising experienced an increase of 18.6% over the level of two seasons ago.

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

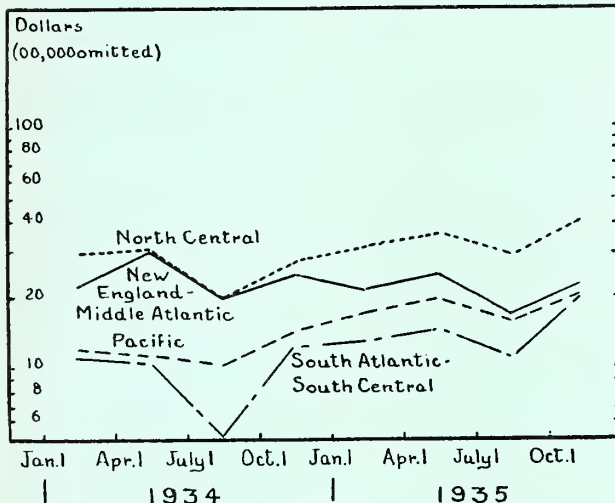
RADIO BROADCAST ADVERTISING VOLUME BY QUARTERS January, 1934 to December, 1935



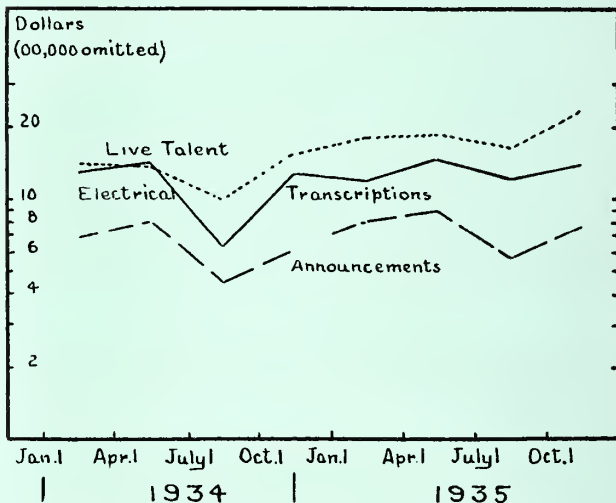
NON-NETWORK ADVERTISING BY STATION POWER (QUARTERLY) January, 1934 to December, 1935



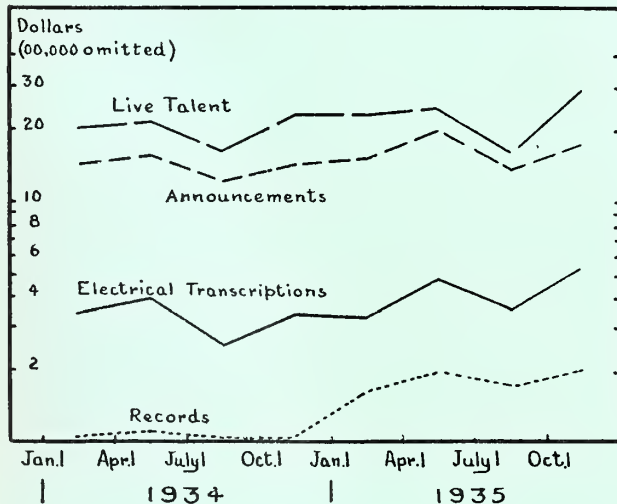
NON-NETWORK ADVERTISING BY GEO- GRAPHICAL DISTRICTS (QUARTERLY) January, 1934 to December, 1935



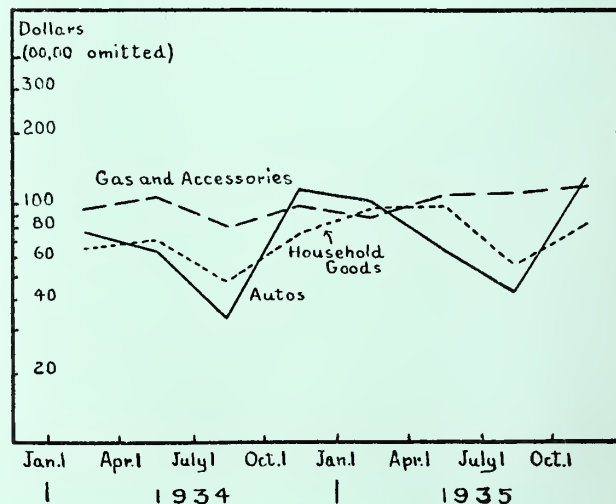
NATIONAL NON-NETWORK ADVERTISING BY TYPE OF RENDITION (QUARTERLY) January, 1934 to December, 1935



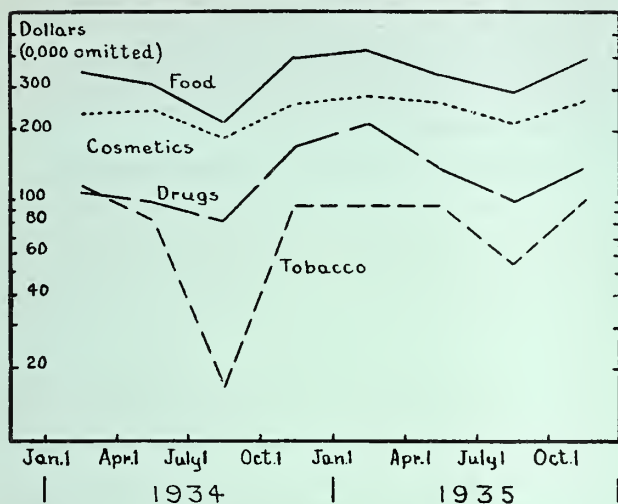
LOCAL ADVERTISING BY TYPE OF RENDITION (QUARTERLY) January, 1934 to December, 1935



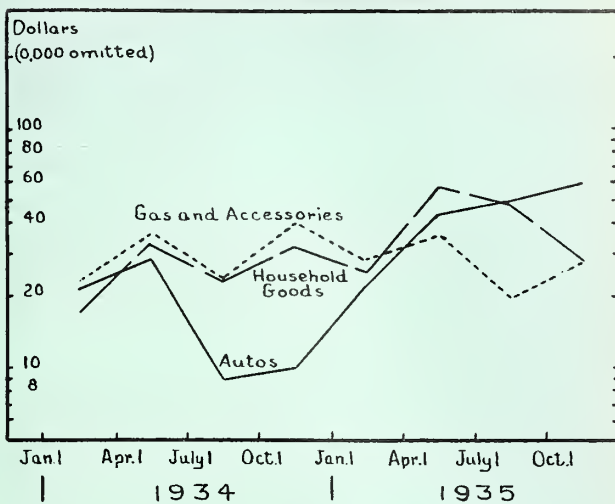
NATIONAL NETWORK ADVERTISING BY PRODUCT CLASSES (QUARTERLY) January, 1934 to December, 1935



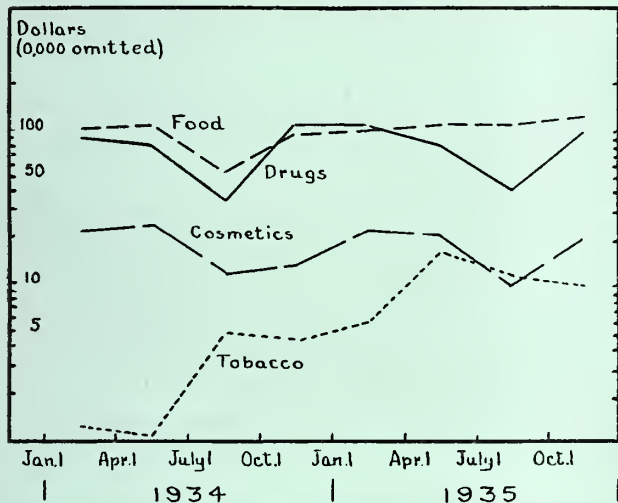
**NATIONAL NETWORK ADVERTISING BY
PRODUCT CLASSES (QUARTERLY)**
January, 1934 to December, 1935



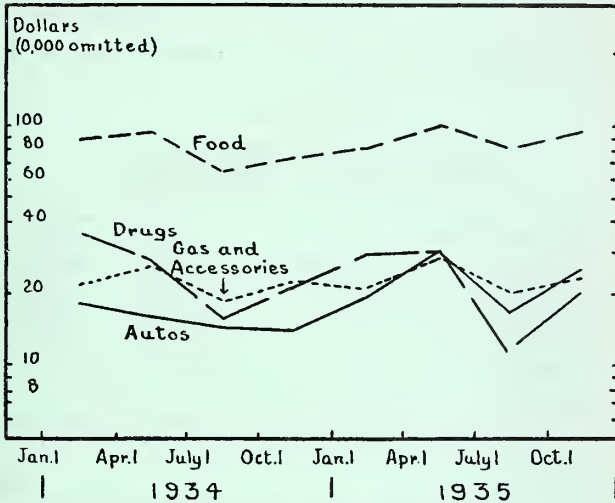
**NATIONAL NON-NETWORK ADVERTISING BY
PRODUCT CLASSES (QUARTERLY)**
January, 1934 to December, 1935



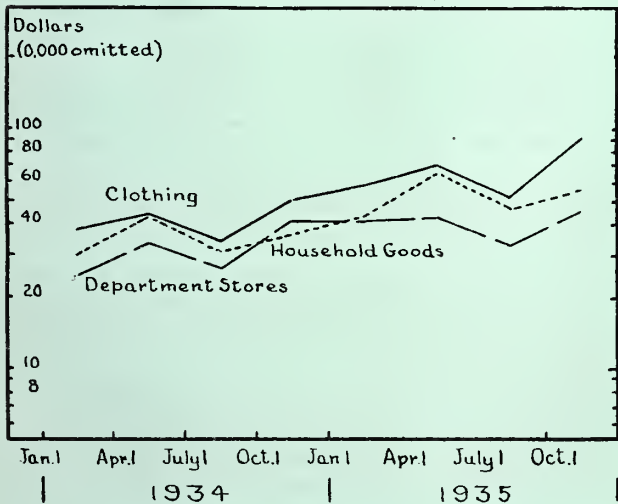
**NATIONAL NON-NETWORK ADVERTISING BY
PRODUCT CLASSES (QUARTERLY)**
January, 1934 to December, 1935



**LOCAL ADVERTISING BY PRODUCT CLASSES
(QUARTERLY)**
January, 1934 to December, 1935



**LOCAL ADVERTISING BY PRODUCT CLASSES
(QUARTERLY)**
January, 1934 to December, 1935



**BROADCAST ADVERTISING BY RETAIL
ESTABLISHMENTS (QUARTERLY)**
January, 1934 to December, 1935

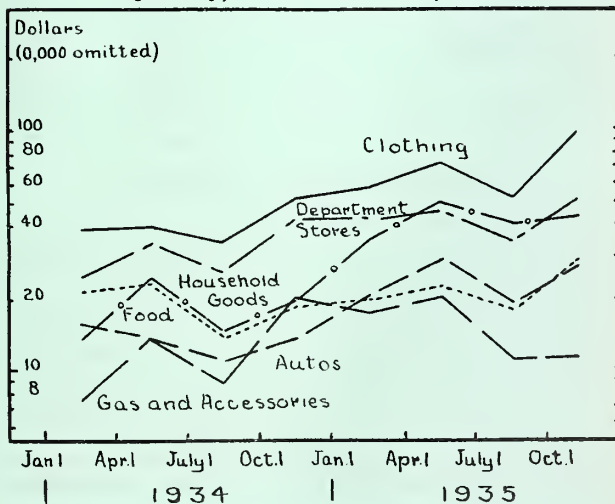


TABLE III
NON-NETWORK BROADCAST ADVERTISING BY
POWER OF STATION

<i>Power of Station</i>	<i>Gross Time Sales</i>	
	<i>1934</i>	<i>1935</i>
Over 1,000 watts.....	\$13,408,584	\$16,564,505
250-1,000 watts.....	12,132,301	14,523,795
100 watts.....	3,982,086	5,257,213
Total.....	\$29,522,971	\$36,345,513

There has been little change in the proportion of non-network advertising placed over stations of varying power as compared with 1934. Clear-channel and high-powered regional stations accounted for 45.5% of non-network volume during 1935. Regional stations represented 40.0% of the total, and local stations 14.5%. The proportion represented by regional stations declined approximately 1.0% from the previous year, while the percentage accounted for by local stations rose a corresponding amount.

The southern and far western portions of the country experienced the most important increases in non-network volume during the year. Non-network advertising in the South Atlantic and South Central States increased 52.8% as compared with 1934, while Mountain and Pacific State volume rose 49.3%. Non-network broadcast advertising in the North Central States experienced a gain of 28.6%, while volume in the New England and Middle Atlantic States rose 9.7%. The comparatively small gain in the last-mentioned region is probably due to the relatively large proportion of total station facilities affiliated with the so-called basic networks of the national network companies. The decided rise in network business has thus acted as an automatic brake on non-network growth by absorbing much of the desirable time.

Non-network broadcast advertising in various sections of the country is set forth in Table IV.

TABLE IV
NON-NETWORK ADVERTISING BY
GEOGRAPHICAL DISTRICTS

<i>Geographical District</i>	<i>Gross Time Sales</i>	
	<i>1934</i>	<i>1935</i>
New England-Middle Atlantic Area...	\$9,815,695	\$8,945,782
South Atlantic-South Central Area....	3,944,650	6,060,358
North Central Area.....	10,822,445	13,941,087
Pacific and Mountain Area.....	4,940,181	7,398,286
Total.....	\$29,522,971	\$36,345,513

The rise in non-network volume in the west and south has materially affected the relative proportion of total advertising of this

type accounted for by each section of the country. Whereas the New England and Middle Atlantic States accounted for 33.2% of total non-network volume in 1934, they represented but 24.5% in the following year. Non-network advertising represented by the South Atlantic and South Central States amounted to 16.6% during the year under review as compared to 13.5% in 1934.

The increase in the proportion accounted for by the Mountain and Pacific States was from 16.9% to 20.7%. Whereas the North Central States were responsible for 36.4% of total non-network advertising in 1934, they accounted for 38.2% in 1935.

Non-network Advertising by Type of Rendition

Live talent programs, produced in station studios, experienced the greatest increase of any major type of rendition during the year, gaining 25.1% over the 1934 level. Transcription volume rose 18.9%, while announcement business increased 19.6%. Records, representing but a small proportion of total non-network advertising volume by type of rendition, registered a gain of 83.7% over the previous year.

The marked gain in live talent business was due principally to a decided trend toward the use of this type of rendition by national advertisers in their non-network broadcasting. National non-network live talent advertising rose 38.2% during the year, as compared to a rise of 15.3% in transcription volume and of 19.1% in announcement business.

Compared to the last six months of 1933, for which data alone are available, national transcription advertising for the corresponding period of 1935 rose 59.6%, live talent volume increased 146.0%, and announcement revenues declined 9.6%.

Local broadcast advertising presented a somewhat different picture as to trends in the use of various types of rendition. Largely because of a marked rise during the latter portion of the year, local transcription volume showed a gain of 33.5% over 1934. Record volume rose 82.4%, live talent business 15.5%, and announcement revenues 20.3%.

Comparing the latter half of the year under review to the corresponding period of 1933 emphasizes, even more clearly, the local transcription trend during the past two seasons. Transcription volume is found to have gained 54.9%, live talent 10.3%, records 12.1%, and announcements 13.9%.

The proportion of total non-network broadcast advertising represented by various types of rendition differed very little from that of the previous year, both in the national and local fields. With regard to total non-network advertising, transcriptions represented 20.9%, live talent 48.3%, records 2.3%, and announcements 28.5%.

In the case of national non-network advertising, transcriptions accounted for 37.7% of total volume, live talent 42.9%, records 0.4%, and announcements 19.0%. Transcription volume amounted to 9.0% of the local broadcast advertising total, live talent 50.0%, records 3.8%, and announcements 37.2%.

Broadcast advertising by type of rendition is represented in Table V.

TABLE V
NON-NETWORK BROADCAST ADVERTISING BY TYPE OF SPONSORING BUSINESS

<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>1935</i>
Electrical transcriptions.....	\$5,090,925	\$5,870,614	\$1,308,265	\$1,743,894	\$6,399,190	\$7,614,508
Live talent programs.....	5,798,723	8,015,119	8,356,675	9,664,411	14,155,399	17,679,530
Records.....	55,847	103,914	407,280	745,157	463,127	849,071
Announcements.....	2,596,275	3,074,131	5,908,980	7,128,273	8,505,255	10,202,404
Total.....	\$13,541,770	\$17,063,778	\$15,981,201	\$19,281,735	\$29,522,971	\$36,345,513

Broadcast Advertising Sponsorship

With the exception of financial advertising, which declined 0.2% as compared to the preceding year, all forms of broadcast advertising sponsorship experienced gains during 1935. Automotive advertising increased 49.6% as against 1934. Automotive volume rose on all portions of the medium, national non-network business leading with a gain of 148.8%. Clothing advertising volume rose 52.8%, due principally to an increase in the local field. Housefurnishings advertising exceeded the 1934 level by 47.7%, local volume again being responsible in the main. Department store advertising increased 35.3%; national non-network volume, composed of advertising by the retail branches of mail order houses, rose 93.8%.

Other increases as compared to 1934 were as follows: Amusements, 1.4%; gasoline and accessories, 5.6%; drugs and pharmaceuticals,

18.3%; cosmetics, 9.0%; foodstuffs, 20.6%; beverages, 1.0%; confectionery, 30.0%; soap and kitchen supplies, 3.8%; radio sets, 66.0%; tobacco products, 26.5%; and miscellaneous advertisers, 11.8%.

Foodstuffs again lead the sponsor field, accounting for 19.0% of the total broadcast advertising volume of the year. This was the same as in 1934. The combined food, beverage and confectionery group represented 26.7% of the year's radio advertising volume, as compared to 27.4% in 1934.

Cosmetics ranked second, with 13.1% of the medium's total as compared to 14.4% in the previous year. Drugs and pharmaceuticals ranked third with 12.1% in 1935 and 12.3% in the year prior to that. The miscellaneous group again ranked fourth, accounting for 10.2% of the total revenues of the medium during the year under review,

and 11.3% in 1934. Accessories placed fifth, as in the preceding year, accounting for 7.6% in 1935 and 8.6% in 1934.

The most marked change in proportion of total broadcast advertising represented by it occurred in the automotive field, which, though

remaining in sixth place, rose from 5.7% of the medium's revenues to 7.1%.

Broadcast advertising in 1934 and 1935 by different product and service groups is found in Tables VI (A) and VI (B).

TABLE VI(A)
BROADCAST ADVERTISING BY TYPE OF SPONSORING BUSINESS
(1935)

Type of Sponsoring Business	National Networks		Regional Networks		Gross Time Sales National Non-network		Local		Total	
1a. Amusements	—	—	—	—	\$53,740	.3%	\$504,515	2.6%	\$558,255	.6%
1-2. Automobiles and accessories:										
1. Automobiles	\$3,466,379	6.9%	\$8,174	.7%	1,795,853	10.5%	949,056	4.9%	6,219,462	7.1%
2. Accessories, gas and oils	4,311,909	8.6%	156,937	14.1%	1,152,268	6.6%	966,093	5.0%	6,587,207	7.6%
3. Clothing and apparel	456,743	.9%	54,103	4.9%	367,420	2.2%	2,757,916	14.3%	3,636,182	4.2%
4-5. Drugs and toilet goods:										
4. Drugs and pharmaceuticals	6,145,306	12.3%	76,627	6.9%	3,480,850	20.5%	918,934	4.8%	10,621,717	12.1%
5. Toilet goods	10,294,126	20.6%	33,769	3.0%	851,281	5.0%	276,395	1.4%	11,455,571	13.1%
6-8. Food products:										
6. Foodstuffs	10,456,847	20.9%	272,317	24.5%	3,513,948	20.6%	2,405,326	12.5%	16,648,438	19.0%
7. Beverages	3,016,912	6.0%	31,963	2.9%	658,622	3.9%	1,063,642	5.5%	4,771,139	5.5%
8. Confections	1,317,113	2.6%	48,122	4.3%	431,733	2.5%	126,307	.7%	1,923,275	2.2%
9-10. Household goods:										
9. Household equipment and furnishings	566,610	1.1%	83,212	7.5%	670,221	3.9%	2,096,064	10.9%	3,416,107	3.9%
10. Soaps and kitchen supplies	2,816,578	5.6%	51,246	4.6%	940,083	5.5%	87,743	.5%	3,895,650	4.5%
11. Insurance and financial	442,425	.9%	5,350	.5%	208,429	1.2%	673,867	3.5%	1,330,071	1.5%
12. Radios	1,081,460	2.2%	—	—	129,565	.8%	191,543	1.0%	1,402,568	1.6%
13. Retail establishments	59,119	.1%	860	.1%	109,008	.6%	1,659,122	8.6%	1,828,109	2.1%
14. Tobacco products	3,528,790	7.1%	169,565	15.3%	457,380	2.7%	79,611	.4%	4,235,346	4.8%
15. Miscellaneous	2,107,369	4.2%	118,494	10.7%	2,243,287	13.2%	4,525,601	23.4%	8,994,751	10.2%
Total	\$50,067,686	100.0%	\$1,110,739	100.0%	\$17,063,688	100.0%	\$19,281,735	100.0%	\$87,523,848	100.0%

TABLE VI(B)
BROADCAST ADVERTISING BY TYPE OF SPONSORING BUSINESS
(1934)

Type of Sponsoring Business	National Networks		Regional Networks		Gross Time Sales National Non-network		Local		Total	
1a. Amusements	—	—	—	—	\$35,742	.3%	\$514,986	3.2%	\$550,728	.8%
1-2. Automobiles and accessories:										
1. Automobiles	\$2,785,685	6.2%	\$5,853	.9%	721,743	5.3%	644,545	4.1%	4,157,826	5.7%
2. Accessories, gas and oils	3,827,158	8.6%	222,266	31.0%	1,287,053	9.5%	901,302	5.6%	6,237,779	8.6%
3. Clothing and apparel	372,776	.8%	15,723	2.2%	301,563	2.2%	1,690,076	10.6%	2,380,138	3.2%
4-5. Drugs and toilet goods:										
4. Drugs and pharmaceuticals	4,804,381	11.1%	23,922	3.2%	3,134,909	23.1%	1,012,440	6.3%	8,975,652	12.3%
5. Toilet goods	9,400,764	24.2%	7,883	1.1%	795,945	5.8%	305,868	1.9%	10,510,460	14.4%
6-8. Food products:										
6. Foodstuffs	8,450,701	20.1%	178,726	25.1%	2,778,730	20.5%	2,404,898	15.1%	13,813,055	19.0%
7. Beverages	3,358,805	7.5%	71,319	10.0%	517,721	3.8%	774,948	4.8%	4,722,793	6.4%
8. Confections	1,081,363	2.4%	9,210	1.3%	335,975	2.4%	46,514	.3%	1,473,062	2.0%
9-10. Household goods:										
9. Household equipment and furnishings	417,168	.9%	20,502	2.8%	535,848	3.9%	1,345,497	8.4%	2,319,015	3.2%
10. Soaps and kitchen supplies	2,210,178	5.1%	796	.1%	515,415	3.7%	94,403	.6%	2,820,791	3.8%
11. Insurance and financial	611,822	1.3%	21,904	3.0%	201,369	1.5%	497,758	3.1%	1,332,853	1.8%
12. Radios	656,090	1.4%	—	—	50,382	.4%	138,938	.9%	845,410	1.0%
13. Retail establishments	—	—	—	—	56,256	.5%	1,295,026	8.1%	1,351,282	1.9%
14. Tobacco products	3,181,988	7.1%	3,835	.5%	125,544	.9%	35,853	.2%	3,347,220	4.6%
15. Miscellaneous	1,488,202	3.3%	135,178	18.8%	2,147,575	16.2%	4,278,149	26.8%	8,049,105	11.3%
Total	\$42,647,081	100.0%	\$717,117	100.0%	\$13,541,770	100.0%	\$15,981,201	100.0%	\$72,887,169	100.0%

National Network Advertising in 1935

With but two exceptions, all fields of national network advertising increased as compared to 1934. The exceptions in question were a decline of 27.7% in network financial advertising and a decrease of 10.2% in the beverage field.

The most important gains in the national network field were an increase of 24.4% in automotive advertising, a rise of 23.7% in food sponsorship, and one of 27.9% in the drug and pharmaceutical field. Network drug advertising declined toward the end of the year, how-

ever, as the new policies with regard to this type of advertising began to take effect. The miscellaneous group showed a rise of 41.6% during the year, indicating a widening sponsorship of broadcast advertising over networks. Radio set advertising, representing a somewhat less important segment of the network total, experienced the most pronounced relative increase over the previous year, rising 64.8%.

Other increases in the national network field were as follows: Accessories and gasoline, 12.7%; clothing, 22.5%; cosmetics, 9.5%; confectionery, 21.8%; household equipment, 35.8%; soap and

kitchen supplies, 27.5%; tobacco, 10.9%. National network retail volume represents mail order advertising. None of this class was broadcast in 1934.

Foodstuffs lead the national network field in 1935, accounting for 20.9% of the total volume. Cosmetics, which ranked first in 1934 with 24.2% of the year's total, moved to second place, accounting for 20.6% of 1935 revenues. Drugs were third with 12.3%; accessories and gasoline fourth with 8.6%; tobacco fifth with 7.1%; and automotive advertising sixth with 6.9%. With the exception of the decline in relative importance of cosmetics, the proportion of total volume represented by the leading sponsor groups changed but little from 1934.

Regional Network Advertising

The outstanding development of the year in the regional network field was the increasing diversity of products utilizing this form of broadcast advertising. In addition to several comparative newcomers among the users of regional network advertising, there was a general increase in many sponsoring groups.

Tobacco advertising, principally cigars, rose from \$3,835 in 1934 to a total of \$169,565 during the year under consideration. Soap and kitchen supply advertising increased from \$796 in the previous year to \$51,246 in 1935.

Other fields to experience marked gains included the following: Clothing, 244.1%; cosmetics, 328.8%; drugs and pharmaceuticals, 220.3%; confectionery, 422.5%; and household equipment, principally paints, 305.9%. Foodstuffs, the most important sponsoring group in the regional network field, registered an increase of 52.4% over the 1934 level. Automotive volume rose 39.7%.

Decreases in the remainder of the sponsor group were as follows: Accessories and gasoline, 29.4%; beverages, 55.2%; financial, 75.6%; and miscellaneous, 12.3%. Of these, only gasoline and the miscellaneous group represented important segments of the regional network total.

The important developments in the regional network field with respect to advertising sponsorship brought with them a marked realignment of product groups with regard to their relative importance. Foodstuffs remained in first place, and accounted for 24.5% of the regional total, as compared to 25.1% in 1934. Tobacco climbed from fifteenth in 1934 to second during the year under review and accounted for 15.3% of the regional network total. Gasoline and accessories dropped from first in 1934, when they amounted to 31.0% of the total, to third in 1935, with 14.1%.

The miscellaneous group represented 10.7% in 1935 and ranked fourth. This group accounted for 18.8% of regional revenues in the previous year. Household equipment ranked fifth with 7.5% and drugs sixth with 6.9%. In 1934 drugs ranked fifth with 3.2% and household equipment sixth with 2.8%.

National Non-network Advertising

National non-network advertising experienced increases with regard to all sponsoring product and service groups with but a single exception, gasoline and accessories, which decreased 10.5%. The decline in this field occurred principally since August 1935.

Several highly important gains were recorded during the year. Tobacco advertising, principally cigars and pipe tobacco, increased 264.3% during the year. Automotive advertising rose 148.8%, soap and kitchen supply advertising 82.4%, and mail order retail store advertising 93.8%. The automotive rise began in February 1935 and continued steadily since that time.

Other increases in the national non-network field were as follows: Amusements, 50.4%; clothing, 21.8%; drugs, 11.0%; cosmetics, 7.0%; foodstuffs, 26.3%; beverages, 27.2%; confectionery, 28.5%; household equipment, 25.1%; financial, 3.5%; radios, 57.2%; miscellaneous, 4.5%.

As in the case of national and regional network advertising, foodstuffs comprised the largest single class of national non-network advertising, accounting for 20.6% of the total volume in 1935. This was the same proportion as in the preceding year. However, in 1934, drugs ranked first and represented 23.1% of national non-network revenues. This class of goods dropped to second place, with 20.5%, during the year just closed.

The miscellaneous group ranked third in the national non-network field, comprising 13.2% and 16.2% of total revenues in 1935 and 1934, respectively. Automotive advertising ranked fourth in 1935, with 10.5% of the total, as against sixth in 1934 with 5.3%. Gasoline and accessories ranked fifth in the year just completed with 6.6% as compared to fourth, with 9.5%, in the preceding year. Soap and kitchen supplies ranked sixth in 1935 with 5.5% of the national non-network total. This class of commodity was ninth in the previous year with 3.7%.

Local Broadcast Advertising

Increases again were fairly general in the local broadcast advertising field, though in practically no instance were they as spectacular as in other portions of the medium. Automotive, clothing and house furnishing advertising, fields enjoying considerable growth in sales during the past year, gained especially. Local automotive advertising exceeded the 1934 level by 47.2%. Clothing volume rose 63.2%, while house furnishing advertising increased 55.8%. Local department store sponsorship gained 28.1% over the previous year.

Other gains included the following: Gasoline and accessories, 7.2%; beverages, 37.3%; confectionery, 171.5%; financial, 35.3%; radio sets, 37.9%; tobacco products, 22.0%; and miscellaneous, 5.8%.

Several decreases occurred during the year in the local field. Amusement advertising declined 2.0%, drug volume 9.2%, cosmetic advertising 9.6%, and soap and kitchen supplies 7.0%. Foodstuff volume remained practically unchanged from the previous year's level.

As in 1934, the miscellaneous group comprised the largest single classification in the local broadcast advertising field, accounting for 23.4% of the total revenues of this type. Clothing volume ranked second, and comprised 14.3% of the local total. In 1934 this class of local advertising ranked third and represented 10.6% of local business.

Foodstuffs ranked third in 1935, with 12.5% of the total. House furnishings ranked fourth with 10.9%, automotive advertising fifth with 8.6%, and beverages sixth with 5.5%.

Retail Broadcast Advertising

Broadcast advertising by retail establishments of various types is set forth in Table VII. It will be noted from the table that broadcast advertising by retail establishments increased 48.1% over the previous year.

TABLE VII
RETAIL BROADCAST ADVERTISING OVER
INDIVIDUAL STATIONS

Type of Sponsoring Business	Gross Time Sales			
	1934		1935	
Automobiles and accessories:				
Automobile agencies and used car dealers	\$594,400	8.3%	\$991,595	9.3%
Gasoline stations, garages, etc.	525,997	7.3%	638,195	6.0%
Clothing and apparel shops	1,681,573	23.3%	2,810,962	26.4%
Drugs and toilet goods:				
Drug stores	180,220	2.5%	245,428	2.3%
Beauty parlors	59,358	.8%	108,393	1.0%
Food products:				
Grocery stores, meat markets, etc.	568,157	7.9%	587,265	5.5%
Restaurants and eating places	222,461	3.1%	245,506	2.3%
Beverage retailers	11,187	.2%	42,739	.4%
Confectionery stores, etc.	23,535	.3%	26,459	.3%
Household goods:				
Household equipment retailers	413,340	5.7%	652,914	6.1%
Furniture stores	612,223	8.5%	1,045,802	9.9%
Hardware stores	134,525	1.8%	220,838	2.0%
Radio retailers	145,805	2.0%	172,219	1.6%
Department and general stores	1,351,282	18.7%	1,768,990	16.6%
Tobacco shops	8,896	.1%	8,702	.1%
Miscellaneous	650,109	9.5%	1,074,192	10.2%
Total	\$7,183,069	100.0%	\$10,640,199	100.0%

The most spectacular increase in the field was with regard to beverage retailers, the advertising volume of which rose 282.0% as compared to the preceding year. This class of retail trade, however, is comparatively unimportant and represents but 0.4% of the total retail radio advertising volume.

The most significant increases in retail broadcast advertising included the following: Automotive, 66.8%; clothing, 67.2%; household equipment dealers, principally electrical appliances, 57.9%; furniture stores, 70.8%; hardware retailers, 64.2%; miscellaneous retail establishments, 65.2%; and department stores, 30.9%.

Gasoline and accessory retail advertising rose 21.3%, drug store volume 36.2%, that of beauty parlors 82.6%, grocery stores 3.4%, restaurants 10.4%, confectionery shops 12.4%. Retail tobacco shop business alone declined, dropping 2.2%. This class, however, is quite negligible.

As will be noted from the percentages appearing on Table VII, clothing store volume led the retail field with 26.4% of the entire radio volume. Department stores ranked second with 16.6%, miscellaneous third with 10.2%, furniture stores fourth with 9.9%, automotive fifth with 9.3%, and household equipment dealers sixth with 6.1%.

Comparison with Latter Half of 1933

Since the year of 1933 represented the low point of broadcast advertising during the depression, a comparison of 1935 sponsorship with that period will be of interest. Since complete data are available only for the second half of the former year, all comparisons have been made on the basis of that period and the corresponding months of the year just closed.

Interesting shifts are to be observed in the national network field. The miscellaneous group showed the greatest gain as compared to 1933, rising 162.6%, again pointing to an increasing diversity of broadcast advertising sponsorship.

Soap and kitchen supply volume rose 158.0%, while automotive

advertising increased 156.8%. Other gains were as follows: Radio sets, 111.3%; drugs, 81.4%; cosmetics, 99.4%; and foodstuffs, 78.8%. Advertising in several fields declined. Clothing dropped 14.2%, beverage volume 7.5%, house furnishings 49.0%, tobacco 5.0%, and financial 59.0%.

In the regional network field comparison with 1933 merely confirmed the trends noted in the past year. There were no important decreases.

Marked gains were indicated throughout the entire national non-network field. Automotive volume more than tripled. Tobacco advertising increased more than thirty times the 1933 figure, while radio set volume rose sevenfold. House furnishing and beverage advertising doubled. Clothing and food advertising rose materially, as did drug sponsorship.

Principal decreases in the national non-network field were a decline of 31.2% in gasoline and accessory volume as compared with the latter half of 1933, a drop of 41.0% in cosmetic advertising and of 27.7% in confectionery business.

In the case of local broadcast advertising volume, most gains were comparatively slight as compared to the latter half of 1933. Outstanding increases were as follows: Clothing, 73.1%; house furnishings, 88.0%; beverage and radio set advertising, more than doubled. Food advertising remained at the 1933 level. Amusement volume declined 34.6%, drug advertising 70.0%, and soap and kitchen supply business 54.7%.