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BROADCAST ADVERTISING FOR THE YEAR 1936 AND FOR DECEMBER

Broadcast Advertising In 1936

HIGHLIGHTS OF THE YEAR

Broadcast advertising volume reached a new all time high during 1936. Gross time sales amounted to \$107,550,886 as compared to \$87,523,848 in 1935, an increase of 22.9%. Although all portions of the medium registered marked increases, national non-network advertising exhibited the most pronounced gain, rising 41.5%. National network volume rose 19.2%, regional network volume 23.1% and local broadcast advertising 16.0%.

Non-network advertising registered a gain of 27.9% over 1935. Local stations continued the trend of 1934 and 1935 by showing the greatest increase in sales of any class of station. The South Atlantic-South Central Area led all geographical districts by increasing its sales 52.0% over 1935. However, all classes of stations and sections of the country enjoyed considerable increases over 1935 levels.

Although live talent programs represented 47.9% of the total non-network sales during 1936, transcriptions increased to a greater extent than any other type of rendition. Transcriptions during the past year showed a 50.6% gain over 1935.

General gains were experienced in most all broadcast sponsor groups during the year 1936. Only drug and confectionery advertising showed a decline as compared to the previous month. Principal gains were shown in the miscellaneous, soap and kitchen supply, automotive, beverage, tobacco, radio set and financial groups.

TOTAL BROADCAST ADVERTISING

The volume of broadcast advertising over various portions of the medium during 1935 and 1936 is shown in Table I.

TABLE I
TOTAL BROADCAST ADVERTISING

Class of Business	Gross Time Sales	
	1935	1936
National networks.....	\$50,067,686	\$59,671,244
Regional networks.....	1,110,739	1,367,812
National non-network.....	17,063,688	24,141,360
Local.....	19,281,735	22,370,470
Total.....	\$87,523,848	\$107,550,886

Total broadcast advertising for the year 1936 exceeded the gross time sales of 1935 by 22.9%. All portions of the medium experienced marked increases over 1935 levels. National non-network advertising showed the greatest gain over last year, rising 41.5%. National network volume rose 19.2%, regional network business 23.1% and local advertising 16.0%.

The marked increase in national non-network advertising caused sales in this portion of the medium to represent 22.4% of the industry's gross revenues during 1936 as compared to 19.5% in 1935, 18.6% in 1934 and 17.5% in 1933. National network advertising accounted for 55.5% of the gross revenue for 1936 as compared to 57.2% in 1935, 58.5% in 1934, and 55.2% in 1933. Regional network advertising represented 1.3% of the total gross time sales as against 1.2% in 1935, 0.9% in 1934, and 0.7% in 1933. Local business comprised 20.8% of the total sales. Advertising of this type accounted for 22.1% of total volume in 1934 and 1935.

COMPARISON WITH OTHER MEDIA

Compared to radio broadcasting's 22.9% rise over the preceding year, national magazine volume rose 16.8%, national farm paper advertising 26.0% and newspaper lineage 9.8%. Advertising volume by major media during the years of 1935 and 1936 is shown in Table II.

TABLE II
ADVERTISING BY MAJOR MEDIA

Advertising Medium	Gross Time and Space Sales	
	1935	1936
Radio broadcasting.....	\$87,523,848	\$107,550,886
National magazines ¹	123,093,289	143,790,669
National farm papers ¹	5,565,059	7,013,154
Newspapers ²	517,513,000	568,593,000
Total.....	\$733,695,196	\$826,947,709

¹ Publishers Information Bureau.

² Estimated.

NON-NETWORK BROADCAST ADVERTISING

Total non-network broadcast advertising for the year 1936 experienced a gain of 27.9% over the preceding year. Continuing to show the same trend as exhibited in 1934 and 1935 local station volume increased to a greater extent than any other class of stations during 1936. Gross time sales over this class of stations increased 36.5% over

the 1935 level. Clear channel and high-powered regional station volume rose 18.4% over 1935 and regional station volume increased 35.7%.

For the year 1936, gross time sales over clear channel and high-powered regional stations accounted for 42.2% of the total non-network sales. Regional station volume represented 42.4% of the total and local station volume 15.4%. During the year 1935 the composition of non-network sales was as follows: clear channel and high powered regional stations 45.5%; regional stations 40.0%; and local stations 14.5%.

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

TABLE III
NON-NETWORK BROADCAST ADVERTISING BY
POWER OF STATION

<i>Power of Station</i>	<i>Gross Time Sales</i>	
	1935	1936
Over 1,000 watts.....	\$16,564,505	\$19,617,140
250-1,000 watts.....	14,523,795	19,713,950
100 watts.....	5,257,213	7,180,740
Total.....	\$36,345,513	\$46,511,830

The south experienced the greatest increase of any section of the country over 1935, non-network advertising in the South Atlantic-South Central Area rising 52.0%. Non-network advertising in the New England-Middle Atlantic Area rose 20.7% over 1935, in the North Central Area 29.6% and in the Pacific and Mountain Area 13.8%.

Sales in the New England-Middle Atlantic Area comprised 23.2% of total non-network sales in 1936, 24.5% in 1935, and 33.2% in 1934. The proportion of sales in the South Atlantic-South Central Area to the total non-network sales jumped from 13.5% in 1934 and 16.6% in 1935 to 19.8% in 1936. The North Central Area comprised 38.9% of the total as compared to 36.4% in 1934 and 38.2% in 1935. Sales in the Pacific and Mountain Area represented 18.1% of the total as against 16.9% in 1934 and 20.7% in 1935.

Non-network broadcast advertising by geographical districts is shown in Table IV.

TABLE IV
NON-NETWORK ADVERTISING BY GEOGRAPHICAL DISTRICTS

<i>Geographical District</i>	<i>Gross Time Sales</i>	
	1935	1936
New England-Middle Atlantic Area.....	\$8,945,782	\$10,799,850
South Atlantic-South Central Area.....	6,060,358	9,214,070
North Central Area.....	13,941,087	18,073,230
Pacific and Mountain Area.....	7,398,286	8,424,680
Total.....	\$36,345,513	\$46,511,830

NON-NETWORK ADVERTISING BY TYPE
OF RENDITION

As has been evident throughout the past year, transcriptions showed the greatest gain over 1935 of any type of rendition. Total transcription volume rose 50.6%. Live talent volume rose 26.2%, record volume 9.7% and announcement volume 15.5%. Transcriptions accounted for 24.7% of the total amount of non-network sales, live talent 47.9%, records 2.0% and announcements 25.4%. Last year transcriptions accounted for 20.9%, live talent 48.3%, records 2.3% and announcements 28.5%.

In the national non-network field, transcriptions led other types of rendition, rising 53.2% over 1935. Live talent rose 35.6%, records 6.6% and announcements 35.4%. The proportion of total national non-network advertising represented by the various types of rendition is as follows: transcriptions 37.3%, live talent 45.0%, records 0.5%, and announcements 17.2%. In 1935 the proportion was transcriptions 37.7%, live talent 42.9%, records 0.4%, and announcements 19.0%.

Transcriptions also recorded the greatest gain in the local non-network field, rising 41.7% over the 1935 level. Live talent volume rose 18.5%, records 10.2% and announcements 6.9%. Transcriptions comprised 11.0% of the total local non-network sales, live talent 51.2%, records 3.7%, and announcements 34.1%. In 1935 transcriptions amounted to 9.0%, live talent 50.0%, records 3.8% and announcements 37.2%.

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

TABLE V
NON-NETWORK ADVERTISING BY TYPE OF RENDITION

<i>Type of Rendition</i>	<i>Gross Time Sales</i>					
	<i>National Non-network</i>		<i>Local</i>		<i>Total</i>	
	1935	1936	1935	1936	1935	1936
Electrical transcriptions.....	\$5,870,614	\$8,998,075	\$1,743,894	\$2,471,845	\$7,614,508	\$11,469,920
Live talent programs.....	8,015,119	10,869,120	9,664,411	11,452,540	17,679,530	22,321,660
Records.....	103,914	110,860	745,157	821,050	849,071	931,910
Announcements.....	3,074,131	4,163,305	7,128,273	7,625,035	10,202,404	11,788,340
Total.....	\$17,063,778	\$24,141,360	\$19,281,735	\$22,370,470	\$36,345,513	\$46,511,830

BROADCAST ADVERTISING **SPONSORSHIP**

With the exception of drug and confectionery advertising which declined 2.4% and 7.9%, respectively, as com-

pared to the preceding year, all forms of broadcast advertising sponsorship showed gains during 1936. The miscellaneous group increased to the greatest extent over 1935 rising 63.8%, due mainly to sponsored political broad-

casts. National network advertising in this field increased 153.2% over the 1935 level. Other principal increases over 1935 were soap and kitchen supply advertising 45.6%, automotive 39.5%, beverage advertising 37.4%, tobacco advertising 35.4%, radio set advertising 34.5% and financial advertising 30.6%. Amusements rose 8.8%, accessories, gas and oils 18.6%, clothing 7.5%, cosmetics 12.6%, foodstuffs 17.3%, household equipment 5.4% and department store advertising 11.4%.

Foodstuffs led the sponsor field, accounting for 18.2% of the total broadcast advertising of the year. This has been the case for the last two years although foodstuffs comprised 19.0% of the total last year. The leading sponsor groups are the same as last year but their places have been changed. During the year just passed foodstuffs accounted for 18.2%, miscellaneous 13.8%, cosmetics 12.0%, drugs 9.6%, automobiles 8.1% and accessories 7.3%. In 1935, foodstuffs accounted for 19.0%,

TABLE VI(A)
BROADCAST ADVERTISING BY TYPE OF SPONSORING BUSINESS
(1936)

Type of Sponsoring Business	National Networks		Regional Networks		National Non-network		Local		Total	
1a. Amusements	—	—	\$1,509	.1%	\$127,470	.5%	\$478,500	2.1%	\$607,479	.6%
1-2. Automobiles and accessories:										
1. Automobiles	4,623,743	7.7%	7,070	.5%	2,660,070	11.0%	1,390,735	6.2%	8,681,618	8.1%
2. Accessories, gas and oils	4,754,419	7.9%	252,120	18.5%	1,902,300	7.9%	905,325	4.0%	7,814,164	7.3%
3. Clothing and apparel	370,280	.6%	4,976	.4%	468,060	1.9%	3,065,900	13.7%	3,909,216	3.6%
4-5. Drugs and toilet goods:										
4. Drugs and pharmaceuticals	5,036,317	8.4%	105,443	7.7%	4,500,610	18.6%	719,620	3.2%	10,361,990	9.6%
5. Toilet goods	11,384,111	19.1%	53,155	3.9%	1,220,320	5.1%	241,380	1.1%	12,898,966	12.0%
6-8. Food products:										
6. Foodstuffs	11,211,087	18.8%	359,641	26.3%	5,026,440	20.8%	2,946,020	13.2%	19,543,188	18.2%
7. Beverages	4,469,454	7.5%	113,714	8.3%	717,870	2.9%	1,256,040	5.6%	6,557,078	6.1%
8. Confections	1,281,418	2.2%	27,529	2.0%	378,840	1.6%	82,990	.4%	1,770,777	1.6%
9-10. Household goods:										
9. Household equipment and furnishings	417,799	.7%	54,164	3.9%	858,035	3.6%	2,271,325	10.2%	3,601,323	3.3%
10. Soaps and kitchen supplies	4,174,139	7.0%	61,752	4.5%	1,344,600	5.6%	93,150	.4%	5,673,641	5.3%
11. Insurance and financial	567,123	.9%	12,937	1.0%	243,630	1.0%	913,610	4.1%	1,737,300	1.6%
12. Radios	1,388,846	2.4%	1,328	.1%	266,070	1.1%	231,050	1.0%	1,887,294	1.7%
13. Retail establishments	—	—	9,545	.7%	146,245	.6%	1,880,850	8.4%	2,036,640	1.9%
14. Tobacco products	4,656,641	7.9%	105,610	7.7%	886,080	3.6%	86,755	.4%	5,735,086	5.3%
15. Miscellaneous	5,335,867	8.9%	197,319	14.4%	3,394,720	14.2%	5,807,220	26.0%	14,735,126	13.8%
Total	\$59,671,244	100.0%	\$1,367,812	100.0%	\$24,141,360	100.0%	\$22,370,470	100.0%	\$107,550,886	100.0%

TABLE VI(B)
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%

cosmetics 13.1%, drugs 12.1%, miscellaneous 10.2%, accessories 7.6% and automobiles 7.1%.

Broadcast advertising in 1935 and 1936 by different product and service groups is found in Tables VI(A) and VI(B).

NATIONAL NETWORK ADVERTISING

National network advertising during 1936 experienced a 19.2% increase over the level of 1935. The greatest increase among the various sponsor groups was the miscellaneous group, which rose 153.2%. Principal increases over 1935 were registered in the soap and kitchen supply group which rose 48.2%, the beverage group which increased 48.1% and the automotive group which was 33.3% ahead of last year. Other increases over 1935 were as follows: accessories 10.2%, cosmetics 10.5%, foodstuffs 7.2%, financial 28.1%, radio sets 28.4% and tobacco products 31.9%. Clothing declined 18.9%, drugs 18.0%, confectionery 2.7% and household equipment 26.2%.

The composition of national network advertising changed little with regard to leading sponsor groups. In 1936, cosmetics with 19.1% of the total, led the field. This group was followed by foodstuffs comprising 18.8% of the total, miscellaneous 8.9%, drugs 8.4% and tobacco products and accessories each with 7.9% of the total. In 1935, the leading sponsor groups with their per cent of the total were foodstuffs 20.9%, cosmetics 20.6%, drugs 12.3%, accessories 8.6%, tobacco 7.1% and automotive advertising 6.9%.

REGIONAL NETWORK ADVERTISING

Regional network advertising was 23.1% ahead of the 1935 total. Many increases and decreases of importance occurred. Beverage advertising increased 255.7%, financial advertising 141.8% and the miscellaneous group 66.5%. Other increases were as follows: accessories 60.6%, cosmetics 57.4%, drugs 37.6%, foodstuffs 32.0%, and soaps and kitchen supplies 20.5%. Automotive decreased 13.5%, clothing 90.8%, confectionery 42.7%, household equipment 34.9% and tobacco products 37.7%. Foodstuffs, accessories, miscellaneous, beverage, drug and tobacco advertising sponsor groups were the leaders in total composition. In 1935, sales were heaviest in the foodstuffs, tobacco, accessories, miscellaneous, household equipment and drug sponsor groups.

NATIONAL NON-NETWORK ADVERTISING

With but one exception, all sponsor groups experienced increases in the national non-network field which was 41.5% ahead of the 1935 total. Confectionery volume decreased 12.2%. The principal increases were in the radio set group which rose 105.3%, tobacco products

93.7%, accessories 65.1% and miscellaneous 51.3%. Other increases were as follows: amusements 137.2%, automotive 48.1%, clothing 27.3%, drugs 29.2%, cosmetics 43.3%, foodstuffs 43.0%, beverages 8.9%, household equipment 28.0%, soap and kitchen supplies 43.0%, financial 16.8%, and department store advertising 34.1%.

Foodstuffs comprised the largest single class of national non-network advertising, accounting for 20.8% of the total for 1936. This group was followed in their order of importance by the drug, miscellaneous, automotive, accessory and soap and kitchen supply groups. This was the exact order of importance in 1935.

LOCAL BROADCAST ADVERTISING

Local broadcast advertising increased 16.0% over 1935. Principal increases were in the automotive, foodstuffs, financial and miscellaneous groups. Increases over 1935 were as follows: automotive 46.5%, clothing 11.1%, foodstuffs 22.4%, beverages 18.1%, household equipment 8.3%, soap and kitchen supplies 6.1%, financial 35.5%, radio set 20.5%, department store 13.3%, tobacco products 8.9%, and miscellaneous 28.3%. Amusements declined 5.1%, accessories 6.3%, drugs 21.6%, cosmetics 12.6% and confectionery 34.2%.

The miscellaneous, clothing, foodstuffs, household equipment, department store and automotive groups were the largest users of local broadcast advertising during 1936. For 1935 this order was miscellaneous, clothing, foodstuffs, household equipment, automotive and beverage advertising.

RETAIL BROADCAST ADVERTISING

Retail broadcast advertising over individual stations during 1936 was 15.6% greater than during 1935. The

TABLE VII
RETAIL BROADCAST ADVERTISING OVER
INDIVIDUAL STATIONS

Type of Sponsoring Business	Gross Time Sales			
	1935		1936	
Automobiles and accessories:				
Automobile agencies and used dealers.....	\$991,595	9.3%	\$1,422,050	11.5%
Gasoline stations, garages, etc.	638,195	6.0%	472,760	3.8%
Clothing and apparel shops.....	2,810,962	26.4%	3,257,360	26.5%
Drugs and toilet goods:				
Drug stores.....	245,428	2.3%	198,245	1.6%
Beauty parlors.....	108,393	1.0%	102,240	.8%
Food products:				
Grocery stores, meat markets, etc.....	587,265	5.5%	667,550	5.4%
Restaurants and eating places.	245,506	2.3%	258,150	2.1%
Beverage retailers.....	42,739	.4%	31,960	.3%
Confectionery stores, etc.....	26,459	.3%	30,980	.3%
Household goods:				
Household equipment retailers	652,914	6.1%	747,210	6.1%
Furniture stores.....	1,045,802	9.9%	1,238,490	10.1%
Hardware stores.....	220,838	2.0%	214,550	1.8%
Radio retailers.....	172,219	1.6%	212,570	1.7%
Department and general stores..	1,768,990	16.6%	2,029,461	16.5%
Tobacco shops.....	8,702	.1%	3,090
Miscellaneous.....	1,074,192	10.2%	1,416,290	11.5%
Total.....	\$10,640,199	100.0%	\$12,302,956	100.0%

greatest increase was registered in the automobile agencies group which rose 43.4% over the 1935 level. Radio retailers increased 23.4%, furniture stores advanced 18.4% and confectionery stores rose 17.1%. Other increases were as follows: miscellaneous 31.8%, clothing stores 15.9%, department stores 14.7%, household equipment dealers 14.4%, grocery stores 13.6%, and restaurants 5.1%. Gasoline station advertising declined 25.9%, drug stores 19.2%, beauty parlors 5.6%, beverage retailers 25.2%, hardware stores 2.8%, and tobacco shops 64.4%.

Broadcast advertising by retail establishments of various types for the year is set forth in Table VII.

BROADCAST ADVERTISING IN DECEMBER

HIGHLIGHTS OF THE MONTH

Broadcast advertising during December amounted to \$11,119,557, a decline of 2.6% as compared to the preceding month but a gain of 28.0% as compared to December 1935. National network volume stayed at approximately the same level, local advertising increased 4.4% while regional network and national non-network business experienced declines. All portions of the medium except the regional networks enjoyed increases in business when compared to last December.

Non-network advertising declined 6.1% from the level of the previous month but was 33.7% ahead of the corresponding month of last year. Local station volume alone showed an increase over November. All sections of the country showed a slight decline in volume of non-network advertising. However, all classes of stations and geographical districts were still well ahead of the level of the corresponding month of last year.

Records were the only type of rendition to show an increase in the non-network field. Announcements declined 10.9%, transcriptions 8.8% and live talent 2.5%. Total transcriptions showed the greatest increase when compared to last December, rising 49.3%. In the local field, transcriptions gained 23.7% over November, other types of rendition showing smaller gains. Record volume alone showed an increase in the national non-network field.

The following principal increases over November were shown in the sponsor groups: national network drugs and pharmaceuticals, confectionery, financial and radio set advertising; national non-network financial advertising; regional network clothing, drug, foodstuffs and beverage advertising; and local drug, confectionery, and tobacco advertising. National network automotive and financial advertising, regional network drug and accessory advertising; national non-network accessory and tobacco ad-

vertising and local drug and foodstuffs advertising showed the principal gains over the corresponding month of last year. Retail advertising amounted to \$1,410,480, an increase of 8.7% over November and a gain of 23.3% over December 1935.

TOTAL BROADCAST ADVERTISING

Total broadcast advertising for the month of December is found in Table I.

TABLE I
TOTAL BROADCAST ADVERTISING

	1936 Gross Time Sales		
<i>Class of Business</i>	<i>November</i>	<i>December</i>	<i>Cumulative Jan.-Dec.</i>
National networks...	\$6,149,818	\$6,185,441	\$59,671,244
Regional networks...	122,725	99,416	1,367,812
National non-network	2,873,200	2,461,200	24,141,360
Local.....	2,273,400	2,373,500	22,370,470
Total.....	\$11,419,143	\$11,119,557	\$107,550,886

¹ Yearly Adjusted P.I.B. Totals.

Total broadcast advertising declined 2.6% from the previous month's level. National network volume showed a slight increase of less than 1.0% while local advertising rose 4.4%. Regional network volume experienced the greatest decrease, declining 18.9%. National non-network business decreased 14.3% compared to November.

Only regional network volume showed a decrease when compared to December of last year, declining 21.8%. National network volume increased 25.1%, national non-network business 44.1% and local advertising 24.4%. Total broadcast advertising increased 28.0% over the corresponding month of last year.

COMPARISON WITH OTHER MEDIA

Advertising volume by major media during the month of December is found in Table II.

TABLE II
ADVERTISING BY MAJOR MEDIA

	1936 Gross Time and Space Sales		
<i>Advertising Medium</i>	<i>November</i>	<i>December</i>	<i>Cumulative Jan.-Dec.</i>
Radio broadcasting...	\$11,419,143	\$11,119,557	\$107,550,886
National magazines ¹ ...	14,781,528	12,264,808	143,790,669
National farm papers ¹	607,976	631,615	7,013,154
Newspapers ²	53,362,000	52,867,000	568,593,000
Total.....	\$80,170,647	\$76,882,980	\$826,947,709

¹ Publishers Information Bureau.

² Estimated.

National magazine volume decreased 17.0%, a usual seasonal decline. Newspaper advertising during December experienced less than the usual seasonal decline, dropping less than 1.0%. National farm papers registered a gain of 3.8%.

Compared to December 1935, national magazine volume rose 26.7%, national farm paper advertising 39.4% and newspaper lineage 7.5%.

NON-NETWORK ADVERTISING

Total non-network advertising declined 6.1% as compared to November but registered a gain of 33.7% over December of last year. The only increase over November was experienced by the local station group which rose 5.7%. Non-network advertising over clear channel and high-powered regional stations declined 9.4% and the volume of the regional station group dropped 6.3%.

All classes of stations showed marked increases over the corresponding month of last year. Clear channel station volume rose 17.8%, regional station business 46.7% and local station business 50.4%.

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

TABLE III
NON-NETWORK ADVERTISING BY POWER OF STATION

Power of Station	1936 Gross Time Sales		
	November	December	Cumulative Jan.-Dec.
Over 1,000 watts.....	\$2,191,200	\$1,983,600	\$19,617,140
250-1,000 watts.....	2,266,400	2,122,500	19,713,950
100 watts.....	689,000	728,600	7,180,740
Total.....	\$5,146,600	\$4,834,700	\$46,511,830

Non-network advertising experienced a general decline in volume in all sections of the country during December. Advertising in the New England-Middle Atlantic Area declined 8.2%, South Atlantic-South Central Area 5.9%, North Central Area 1.3% and the Pacific and Mountain Area 12.6%. However, when compared to the corresponding month of the preceding year, all sections of the country showed increases. The gain in the New England-Middle Atlantic Area was 66.1%, the South Atlantic-South Central Area 27.9%, North Central Area 30.5% and the Pacific and Mountain Area 11.2%. Non-network advertising by geographical districts is found in Table IV.

TABLE V
NON-NETWORK BROADCAST ADVERTISING BY TYPE OF RENDITION

Type of Rendition	1936 Gross Time Sales							
	National Non-network		Local		Total		Cumulative Jan.-Dec.	
	November	December	November	December	November	December		
Electrical transcriptions.....	\$1,043,890	\$874,800	\$235,260	\$291,120	\$1,279,150	\$1,165,920	\$11,469,920	
Live talent programs.....	1,236,490	1,168,200	1,181,730	1,187,890	2,418,220	2,356,090	22,321,660	
Records.....	11,340	14,400	78,060	86,410	89,400	100,810	931,910	
Announcements.....	581,480	403,800	778,350	808,080	1,359,830	1,211,880	11,788,340	
Total.....	\$2,873,200	\$2,461,200	\$2,273,400	\$2,373,500	\$5,146,600	\$4,834,700	\$46,511,830	

SPONSOR TRENDS IN DECEMBER

Drugs and pharmaceuticals, confectionery, financial and radio set advertising showed the principal gains over last month among the various sponsor groups in the national

TABLE IV
NON-NETWORK BROADCAST ADVERTISING BY GEOGRAPHICAL DISTRICTS

Geographical District	1936 Gross Time Sales		
	November	December	Cumulative Jan.-Dec.
New England-Middle Atlantic Area.....	\$1,385,400	\$1,270,900	\$10,799,850
South Atlantic-South Central Area.....	973,900	915,500	9,214,070
North Central Area.....	1,879,000	1,854,900	18,073,230
Pacific and Mountain Area.....	908,300	793,400	8,424,680
Total.....	\$5,146,600	\$4,834,700	\$46,511,830

NON-NETWORK ADVERTISING BY TYPE OF RENDITION

Record volume alone showed an increase over the level of the previous month, rising 12.7%. Announcement volume declined 10.9%, transcription business 8.8% and live talent business 2.5%. Transcriptions showed the greatest increase when compared to last December, rising 49.3%. Live talent business increased 25.8% over last December, records 17.5%, and announcements 38.4%.

In the national non-network field, transcription volume declined 16.2%, live talent business 5.5% and announcement volume 30.5%. Record business rose 26.9%. Compared to the corresponding month of last year, transcriptions rose 52.2%, live talent business 33.1%, records 42.1% and announcements 64.8%.

Transcriptions led the other types of rendition in the local field. Local transcription volume increased 23.7% over the level of November and 41.2% over the corresponding month of last year. Live talent business remained at approximately the same level as last month but was 19.3% ahead of last December. Records and announcements increased 10.6% and 3.8% over November, respectively, and 14.2% and 28.1%, respectively, over last December.

Non-network advertising by type of rendition is set forth in Table V.

network field. The accessory, clothing and household equipment groups experienced decreases. All groups except accessory and household equipment advertising showed gains when compared to last December. Auto-

motive, confectionery, financial and radio set advertising showed the principal gains.

With the exception of clothing, drug, foodstuffs, and beverage advertising, all groups declined in the regional field as compared to November. The accessory, drug, beverage, and financial groups increased materially over last December.

Financial advertising experienced the only marked increase in the national non-network field when compared to November while the amusement, automotive, and

household equipment groups showed the most marked declines. All groups except automotive showed gains as against the corresponding month of last year.

Gains were general in the local field when compared to last month, drug, confectionery, and tobacco groups showing the greatest gains. The automotive, drug, foodstuffs, and department store groups increased materially over last December.

Broadcast advertising during December by the type of sponsoring business is found in Table VI.

TABLE VI
RADIO BROADCAST ADVERTISING BY TYPE OF SPONSORING BUSINESS
(DECEMBER 1936)

<i>Type of Sponsoring Business</i>	<i>National Networks</i>	<i>Regional Networks</i>	<i>Gross Time Sales</i>		
			<i>National Non-network</i>	<i>Local</i>	<i>Total</i>
1a. Amusements.....	—	—	\$6,340	\$38,330	\$44,670
1-2. Automobiles and accessories:					
(1) Automobiles.....	\$577,330	\$950	138,330	112,100	828,710
(2) Accessories, gas and oils.....	367,112	20,520	196,940	73,190	657,762
3. Clothing and apparel.....	38,937	1,267	51,630	388,790	480,624
4-5. Drugs and toilet goods:					
(4) Drugs and pharmaceuticals.....	576,500	12,653	535,240	89,170	1,213,563
(5) Toilet goods.....	1,175,490	4,860	148,730	12,150	1,341,230
6-8. Food products:					
(6) Foodstuffs.....	1,224,304	28,323	571,880	317,490	2,141,997
(7) Beverages.....	416,061	8,965	80,490	111,490	617,006
(8) Confections.....	180,520	1,914	47,930	10,130	240,494
9-10. Household goods:					
(9) Household equipment and furnishings...	30,944	2,938	53,740	215,990	303,612
(10) Soap and kitchen supplies.....	493,222	960	108,060	7,280	609,522
11. Insurance and financial.....	84,872	1,872	17,580	99,690	204,014
12. Radios.....	181,017	—	31,780	35,780	248,577
13. Retail establishments.....	—	1,536	22,160	225,830	249,526
14. Tobacco products.....	403,628	6,440	132,830	7,690	550,588
15. Miscellaneous.....	435,504	6,218	317,540	628,400	1,387,662
Total.....	\$6,185,441	\$99,416	\$2,461,200	\$2,373,500	\$11,119,557

Detailed information regarding various sponsor groups during the month of December is as follows:

1a. **Amusements.** National non-network volume down 55.1% and local advertising up 20.7% as compared to November. Compared to last December, national non-network increased 188.1% and local advertising 33.5%.

1. **Automotive.** National network volume same as last month. Regional network volume amounted to \$950. National non-network and local business declined 55.6% and 28.7%, respectively. National network volume 51.6% above December 1935. National non-network down 11.5% and local up 49.3%.

2. **Accessories and gasoline.** Compared to November, declines as follows: national network 18.8%, regional networks 45.6%, national non-network 30.2%, and local 6.5%. Regional network volume increased 56.3% as compared to the corresponding month of last year. National networks declined 12.8%. National non-network business rose 85.6% and local volume remained the same.

3. **Clothing.** National networks declined 30.2% as compared to last month. Regional business tripled, while

national non-network and local business rose 4.8% and 11.0%, respectively. National network advertising 1.8% above corresponding month of last year. National non-network business up 23.1% and local 19.4%. Regional business declined 41.7%.

4. **Drugs and pharmaceuticals.** Gains over November as follows: national network 23.7%, regional network twofold, national non-network 3.1%, and local 38.7%. Gains compared to last December as follows: national network 9.1%, regional network fourfold, national non-network 18.8%, and local advertising 61.8%.

5. **Toilet goods.** National network volume up 1.1%. Regional network business down 38.2%, national non-network 3.2% and local advertising 27.1% compared to November. As against December of the preceding year national network volume increased 21.0% and national non-network business 72.3%. Regional networks dropped 56.3% and local advertising 64.9%.

6. **Foodstuffs.** Compared to last month, national networks increased 2.2%, regional networks 38.0%, national non-network 2.1% and local business remained the same.

National network volume increased 27.6% as compared to last December. Regional networks declined 16.3% while national non-network and local business rose 55.4% and 51.4%, respectively.

7. *Beverages.* National network volume 3.2% above November. Regional volume up 30.5% and local 6.7%. National non-network down 10.2%. Compared to last December, national networks rose 29.5%, regional networks 49.0% and national non-network 41.8%. Local advertising declined 6.7%.

8. *Confectionery.* National network advertising 47.0% ahead of November. Regional networks down 12.3% and national non-network down 4.0%. Local advertising increased 50.7%. Compared to last December, national networks rose 48.3%, national non-network 9.3% and local 13.3%. Regional network advertising declined materially.

9. *Household equipment.* Compared to last month, national networks declined 25.1%, regional networks 14.7% and national non-network 36.9%. Local advertising increased 1.9%. National networks declined 9.8% from last December. National non-network and local business increased 26.2% and 17.2%, respectively. Regional network business dropped 47.4%.

10. *Soaps and kitchen supplies.* National network and local advertising 2.4% and 1.1%, respectively, ahead of last month. National non-network advertising declined 31.3% and regional network business materially. Compared to the corresponding month of last year, national networks and national non-network business doubled. Local business declined 38.3%.

11. *Financial and insurance.* Compared to last month, national network volume increased 20.6%, national non-network business 56.4%, and local business 12.8%. Regional network business declined 11.4%. Increases over last December as follows: national network 84.7%, regional network 50.4%, national non-network 68.7%, and local 30.1%.

12. *Radios.* National network volume 46.9% ahead of November. National non-network down 35.5%, local up 8.3%. Gains compared to last December as follows: national networks 42.5%, national non-network 21.1%, and local 27.7%.

13. *Department and general stores.* Regional network advertising 63.7% below last month. National non-network increased 5.1% and local 13.6%. Compared to last December, national non-network increased 24.5% and local advertising 46.3%.

14. *Tobacco products.* Compared to last month, national networks rose 3.2%, national non-network 7.3%

and local 33.2%. Regional networks declined 34.3%. National networks 7.2% ahead of last December and national non-network more than tripled. Regional networks and local advertising declined 38.9% and 12.6%, respectively.

15. *Miscellaneous.* Local advertising 4.3% ahead of November. National networks declined 20.9%, regional networks 53.4%, and national non-network advertising 19.7%. Compared to last December, national network volume increased 18.6%, national non-network 45.5% and local advertising 22.5%. Regional network advertising declined 56.3%.

RETAIL BROADCAST ADVERTISING

Retail broadcast advertising over individual stations increased 8.7% over last month contrary to the usual seasonal decline. Principal gains as compared to November as follows: restaurants 22.6%, confectionery stores 101.6%, radio retailers 16.8%, miscellaneous 50.4%, and department stores 12.8%. Principal declines during the month were beauty parlors, 34.5%, automobile agencies, 22.8%, gasoline stations, 29.9%, and beverage retailers 25.0%.

Retail broadcast advertising for December was 23.3% ahead of the same month of last year. Principal gains were as follows: automobile agencies 44.8%, restaurants 32.9%, furniture stores 31.5%, hardware stores 74.5%, radio retailers 57.8%, and department stores 44.1%. Retail broadcast advertising during the month is found in Table VII.

TABLE VII
RETAIL BROADCAST ADVERTISING OVER
INDIVIDUAL STATIONS

<i>Type of Sponsoring Business</i>	<i>1936 Gross November</i>	<i>Time Sales December</i>
Automobiles and accessories:		
Automobile agencies and used car dealers.....	\$147,310	\$113,730
Gasoline stations, garages, etc.....	40,780	28,570
Clothing and apparel shops.....	378,370	426,290
Drugs and toilet goods:		
Drug stores.....	18,420	20,790
Beauty parlors.....	9,100	5,960
Food products:		
Grocery stores, meat markets, etc....	42,420	46,960
Restaurants and eating places.....	24,720	30,310
Beverage retailers.....	3,480	2,610
Confectionery stores.....	1,230	2,480
Household goods:		
Household equipment dealers.....	77,510	59,880
Furniture stores.....	129,360	141,680
Hardware stores.....	22,480	19,780
Radio retailers.....	30,910	36,110
Department and general stores.....	219,790	247,990
Tobacco shops.....		
Miscellaneous.....	151,140	227,340
Total.....	\$1,297,020	\$1,410,480