

A STUDY OF THE ROLE OF ADVERTISING
IN LUMBER MANUFACTURER AND
ASSOCIATION ACTIVITIES

THESIS FOR THE DEGREE OF M. S.

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A STUDY
OF
THE ROLE OF ADVERTISING
IN LUMBER MANUFACTURER
AND ASSOCIATION ACTIVITIES

by
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Foreword

As in all industries, but always years later, the lumber interests are turning to the marketing of forest products for a partial solution of their problems. The accent has left the saw and is slowly approaching the sale. Demand creation is an important function of marketing; and advertising is the method most commonly used by business to create demand.

There exists very little available material on lumber manufacturer and association advertising. Many fabricators consider their advertising expenditures confidential, and are extremely jealous in guarding their secrets. Others classify advertising as a waste of money; and still others have very little left, after paying their obligations, with which to experiment.

Foresters, who hope to contribute their share in solving the conservation problem, must interest themselves in the sale of what they grow. They should know how to attract the elusive consumer; how to satisfy him; how to make him buy more; how to alter his present tastes; how to develop his latent desires. The answer to many of these questions lies in advertising. No problem can be solved by advertising alone.

Even its most ardent exponents do not claim this to be true; but advertising, when cooperatively combined with salesmen and the middlemen in the distributive process, has caused many a sales curve to climb. Perhaps it can do the same for lumber.

S. E. Eisenberg

The Importance and Ills of the Industry

Of all the fifteen major groups of industries in these United States, the forest products aggregate¹ employed 866,599 wage earners in 1929 (9.8% of all industrial wage earners). This placed it in fourth position. In 1935, it dropped to fifth place, employing 7.3% of the country's wage earners in industry.

The forest products aggregate is an important part of American economy. It supports many families. It feeds many mouths. However, since we are interested in lumber manufacturer and association advertising, the forest products industry embraces too large a field. To narrow it down, and to get a better perspective of our problem, we choose "lumber and timber products" to cover the investigation.

The lumber and timber products group,² as shown in Table I, employed 48% of the wage earners used in the forest products aggregate and paid 45% of their wages in 1929. Then it is true to say that the lum-

¹Excelsior, turpentine and rosin, woodworking industries, lasts and related products, planing mill products (made in planing mills not connected with sawmills), window and door, screen and weather strip, lumber and timber products, wood turned and shaped, wood container industries, basket and rattan and willow ware, cooperage, furniture (except cigar boxes), wooden boxes, cigar boxes (wooden and part wooden), billiard tables and pool tables, furniture including store and office fixtures, mirror and picture frames, cork products, matches, pulp goods, synthetic resin, cellulose plastic, vulcanized fiber, wood preserving.

²Logging camps, merchant sawmills, combined sawmills and planing mills, veneer mills, and cooperage stock mills.

**Table I Comparison of Forest Products Aggregate
and the Lumber & Timber Products Group**

In- dus- try	Year	Wage Earners (av. for the Year)	Wages	Value of Products	Value Added by Manufacture
For- est Prod- ucts	1929	866,599	\$926,201,317	\$3,531,281,776	\$1,971,549,971
Lum- ber & Tim- ber Prod- ucts	1929	419,084	421,584,874	1,273,472,320	853,868,932
For- est Prod- ucts	1933	454,171	289,096,768	1,127,404,693	618,222,831
Lum- ber & Tim- ber Prod- ucts	1933	189,367	113,183,481	350,463,587	227,013,192
For- est Prod- ucts	1935	579,012	438,395,310	1,662,220,620	885,729,920
Lum- ber & Tim- ber Prod- ucts	1935	255,230	183,074,245	551,614,009	343,500,838

ber and timber products group is almost half of the en-
tire forest products aggregate.

In the states of Washington, Oregon, Mississippi,
Idaho, Arkansas, Louisiana, New Mexico, and Arizona, the

lumber and timber products industry employs more wage earners than any other industry. In Oregon it supports 48% of the industrial workers; in Washington, 41%; in Idaho, 42%.

The industry means much in the worker's life. Usually it is located in a small town where most of the people are employed in the mill or out in the woods. In many communities of the South, the lumber company owns the home of the employee and supplies him with power, light, and heat. It is pathetic to think of the dependence of thousands upon thousands of families on the operation of one enterprise. If the mill closes down, these people have no other place to look for work, as city industrial employees usually have.

What havoc the employees of the lumber and timber products industry experienced in this depression is demonstrated in Table I. From 1929 to 1933, 55% of them lost their means of earning a living.

In 1929, there were 12,915 mills reporting in, that produced over \$5,000 worth of manufactures. In 1933, the number had fallen to 3,783 - a loss of 71%. This definitely demonstrates the terrific fluctuations that occur in the lumber industry. The price of lumber is determined by supply and demand;

not the cost of manufacture. When the demand is brisk, production increases and mills start sawing, if the supply is low. When the demand falls off, the price of lumber falls, and with it production.

That the lumber industry has not been doing so well is further demonstrated by the examination of income tax statements of reporting corporations for 1935. In that year 58% of all the establishments in the manufacturing classifications filed statements of deficits. In the forest products aggregate, 64% of the corporations reported a net loss for the year. This made the industry -8% off average.

Let us examine the Reconstruction Finance Corporation loans to industries. Table II shows that the lumber and timber products industry was second only to textiles in its inability to attract capital from private sources. Compare how much competitive businesses borrowed from the Reconstruction Finance Corporation. Lumber led them all by far. The ability of business to attract capital is of vital importance. Without this flow of investment funds, no industry can survive.

The United States Forest Service has been advocating regulation of private industry rather strongly these last few years. The justification of this view is not the point; rather, the point is that with

Table II Loans to Industries by the Reconstruction Finance Corporation.

Business	No. of Borrowers	Am't Authorized	Am't Canceled	Am't Disbursed
Total	6,731	\$202,978,581	\$57,702,852	\$106,169,990
Lumber & Timber Products	425	30,170,250	8,843,940	16,034,710
Textiles	355	43,220,490	13,753,126	23,862,830
Concrete	12	572,750	437,500	122,250
Brick & Tile	68	5,282,571	2,063,506	2,638,832
Structural & Ornamental Steel & Iron	51	3,724,600	2,104,335	1,185,515

government loans to private industry may be an entering wedge which will split the business, and with its inability to repay, be the first step in government domination. The easiest guard against this is a healthy industry. We shall investigate the effect of advertising on the well-being of an industry.

Some people are inclined to think that lumber lost quite a few markets because of arch-conservation propaganda. Men and women rode around making speeches on how soon we were to expect a timber famine. Cartoonists were spitting inky vituperations at lumbermen. With all those slogans, telling people to save our forests, many orders flew to the cement, brick and steel companies. We shall investigate the role of advertising in conservation conversion.

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There are two separate battlefields on which the lumber industry will have to fight. One front will yield no direct monetary gain. This is the "conservation front." A victory in the other battle will stuff many dollars into stockholders' and employees' pocket-books. This is the "competitive front."

Advertising plays a primary role in the battle to enlighten the people on the state of the forest problem. It is the cheapest means of letting people know what the industry thinks. The importance of this "conservation front" should not be underestimated. A good analogy can be drawn from the history of the railroads. Because many railroad promoters organized ventures on the shady side, there was a good deal of anti-railroad feeling among the people of the United States after the calamity of the Civil War had worn off. Nothing was done to fight this hatred. Maybe the railroaders thought they were too strong for the common people. Nevertheless, they were proved wrong. The result: "An act to regulate Interstate Commerce." The people of the United States are the supreme judge of what is right or wrong according to man made laws in this country. There is no naivete in this statement. If they want regulation of forest industries, they will have regulation. If they want to take over the ownership of all our forest land, they simply proceed to accomplish what they set out to do. Again, may I say, they

are the supreme judge. It is to them that one has to plead his case. Silence is the self conviction of a moral wrong.

Advertising is simply a weapon that lumbermen can use in order to ward off industrial regulation by the government. With its widespread employment for educational and still commercial purposes, people can be taught to recognize the lumber industry's side of a moot question. With increased sales due to advertising, profits will rise and more money will be available to experiment in the practice of practical forestry. Thus, advertising can contribute its part to make a sick industry well.

For twenty-eight years (1909-1936), the average annual production of lumber stands at 31,676 million feet. We can not quite sell twenty-five billion feet today. Setting up thirty-one billion feet as a point to be aimed at, is not an exaggeration. It can be done, using modern methods of selling. One integral part of the modern sales technique is advertising. In later sections we shall investigate the successes and failures of lumber and other manufacturers in their efforts to increase the consumption of their product.

The Forest Conservation Problem and Advertising

As explained previously, the lumber industry has to solve at least two problems before it can once more

become a healthy, stabilized business. The first of these two enigmas, is the conservation spectre. Spectre is a good word because the conservation problem has been used for personal, selfish reasons. Cement, steel, and brick trade associations have only been too eager to use this word as a stepping stone to more business. It is a paradox that these competitive industries use irreplaceable resources to manufacture their product; while forests are renewable. It is also strange, to say the least, that this conservation propaganda has been directed to "solve" the forest problem. "Save our forests" is a slogan on everyone's lips.

It would be ridiculous for the lumber industry to ignore the ill feeling that this propaganda has created, for you can not sell anything to a man or woman who dislikes you and your methods of doing business.

The first purpose of any industry should be to instill a feeling of confidence and good will in its dealings with the public. This art of public persuasion and propaganda is largely unknown to the lumber business. "Not so much during the depression, but enough to keep it in the people's mind" aptly expresses the conservationists' slogan. The balancing story is missing.

It is not so much the loss of sales (believed to be inconsiderable) that should awaken the manufacturers' associations to do missionary work in this field; but the fear of losing control of the industry. Evidently

these fears are subjugated or otherwise controlled, because less than 5% of lumber advertisements in 1938 mention any word about what the industry or company is doing in a conservation way. Of these 5%, the "permanency" in influenced copy is used as a selling point in the majority of cases. "Buy my products because I try to practice forestry." Even if the copy did not possess this tone, the media used are ridiculous, for contractors and dealers are not the people to convert. They are hard-hearted business men who were cut off from idealism and welded to a practical viewpoint a long time ago. The ultimate consumer is the person who receives all the counter propaganda. He should be made to listen to the industry's point of view.

It is very infrequently that this happens. Rarely does one come across a purely educational advertisement. The National Lumber Manufacturer's Association and The Weyerhaeuser Sales Company are concerned with this problem, because one finds their attempts at influencing the people in consumer media like "the American Forests."

Naturally, it should be the duty of the National Association in collaboration with the regional associations to persuade the public. This is not one company's job. The benefits of an understanding and non-hostile consumer will accrue to the entire industry, for which the association is the spokesman.

If only 5% of the industry's advertisements mention conservation as a part of the sales technique to large buyers of lumber, and if only rarely does the ultimate consumer hear what the lumberman wants him to hear, the road is already paved for government regulation of the lumber business.

Advertising to the ultimate consumer through appropriate media can do a great deal toward solving the conservation problem for the lumberman. It will enable him to concentrate on making his business a healthier enterprise. He will be able to approach the final solution of timber perpetuation in a calm, sane way, unaccompanied by pressure and threats. As a business makes more money, it becomes more willing to try new ideas. And so it is that advertising conservation would be a step forward on the part of the lumber industry.

Advertising is recognized as being the cheapest and best means of delivering a message to a large number of people. Robert Updegraff, in an article in Advertising and Selling in the early 20's said:

"By 1950 men will have learned to express their ideas, their motives, their experiences, their hopes and ambitions as human beings, and their desires and aspirations as groups, by means of printed or painted advertising or of messages projected through the air. The day is almost here, and will surely arrive during the next twenty-five years when men and women will awaken to the futility of trying to express themselves in a handful way by talking to little groups; they will outgrow editorial limitations too, and talk to millions in the newspapers, in the magazines, on the highways, through the air, telling them not once, but

continually, and in the most natural way, what is in their minds and their hearts - about education, about religion, about business, about government, about science, politics, wages, working conditions, social evils, and international comments."

Some might say that the case against the lumber industry is indestructible. This conviction of guilt, so they argue, makes lumbermen feel that they should leave well enough alone. Even government foresters agree that the liquidation of our forests was a matter of the time of United States expansion. Everything was inflated. Everybody had a free hand. That is the reason America became such a rich nation overnight. That this policy of resource liquidation was foolish, everyone will agree. However, it is a moot question whether regulation is better than the 1939 type of laissez-faire.

The industry, however, is against regulation, and should want to spread its doctrine far and wide. The method to use is advertising. The copy to use is of the dignifying, sensible type. The industry has many facts and figures to back up its stand. With the presentation of these facts in suitable consumer media, with the assumption of the propaganda facilities of the printing press, the public mind can be weaned to oppose government regulation.

The lumber industry tells a three-hundred-year story that is more dynamic than any ever written about industry. Men, who approve of its viewpoint, should

be approached to answer critical articles appearing in our magazines and newspapers. Informative pamphlets are cheaply printed and wield a powerful influence if distributed widely.

The time is rapidly approaching when schemes of regulation will be fabricated and presented to the public for approval. The public, as ultimate judge of the industry's destiny, is the one that the lumbermen should woo. To quote Abraham Lincoln:

"In this and like communities, public sentiment is everything. With public sentiment nothing can fail; without it nothing can succeed; consequently, he who molds public sentiment goes deeper than he who enacts statutes or pronounces decisions. He makes statutes and decisions possible or impossible to be executed."

Advertising in General

Advertising is an important member of the large publicity family, whose purpose is to gain access to the public ear and so influence its way of thinking. In this family are also included, news, magazine articles, motion pictures, radio broadcasts, photographs, public speeches, exhibits, books, reports, posters, events, meetings, conventions, etc.

In business, advertising is the most widely used member of publicity. Two billion dollars is the annual advertising bill in normal times. While a trade promotional campaign utilizes all or most of the tools of publicity, it is the scope of our investigation only to examine the workings of advertising. Before applying the principles of this art to the lumber business, it is necessary that we understand its integral parts and their assembly. The easiest way is to trace an account from the day it is born to the day that the client calls the advertising agency and deposits a five-thousand-dollar bonus for an extraordinarily good job.

An enterprising executive in the sales department of an advertising agency calls on an undecided manufacturer of, let us say, lumber and after a good long talk convinces him that advertising is the method of increasing sales, and that his particular agency is experienced in this line and can handle the account to the best advantage of the lumberman.

The manufacturer calls his executives together in order to establish the appropriation for the campaign. In the lumber field, as in other lines of manufactures, there are three methods of determining the appropriation:

1. Make an appraisal of the work to be done by advertising, translate it into cash, and appropriate this amount as the advertising budget.

2. earmark a definite percentage of net sales as the advertising appropriation in accordance with the best judgment of the advertiser and his advisers.

3. Spend as much as possible or as much as is left after all other expenses have been taken care of regardless of the advice of counsel.

Robert Updegraff in a 1923 issue of Advertising and Selling wrote:

"There are a dozen ways of establishing an advertising appropriation and most of them are fundamentally wrong in approach. They remind one of a man laying down \$18.45 at a ticket window and asking for that much worth of railroad ticket. If he is just six hundred and fifteen miles from his desired destination, and the rate is three cents a mile, his travel appropriation is adequate; but if he is three thousand miles from his desired destination, he might better have saved his \$18.45, or else have revised his ideas, and planned a shorter trip, but one with just as definite a destination.

"The point is, there is but one really sound and sensible way to arrive at a proper figure for an advertising appropriation and that is to approach the problem on the basis of:

- (a) The distance to be traveled.
- (b) The force necessary to travel that distance.
- (c) The cost of operating that force....

"The primary question should never be, "How much should we spend?" but, "How far can we go?" or, "What is our destination?"

Despite Mr. Updegraff and others, the haphazard method of determining an appropriation is the most widely used. This budget is usually the first to be cut when the business volume falls off because of economic fluctuations. The following is the text of an advertisement that appeared in the September, 1938 issue of The Hardwood Record:

Wood Has Gone Modern

"Only a few years ago many people were of the mistaken opinion that wood as a structural or decorative material had become hopelessly outmoded, simply because of the smart merchandising of competitive materials whose manufacturers knew about, and utilized the power of modern advertising. It is the kind of advertising that molds the thoughts of men and women today, as lumbermen and wood fabricators have good reason to know, having seen it take markets away from them.

"Now the country is beginning to realize that wood, too, is modern - a fact that can be largely traced to the defensive work of the lumber associations, insignificant though their promotional funds have been, and to the lumber trade press which has held out for wood at times when some of the lumbermen themselves have been a little uncertain.

"Isn't it about time that lumbermen who have lumber to sell and fabricators who have wood built products to sell, take the bit in their teeth and start selling? And isn't it about time that these sellers of wood profit by the experience of others and give wood the benefit of modern advertising? The same force that took markets away can bring them back, if sellers of wood will just realize that advertising is not an expense, but is a sales tool, just like a salesman or the telephone.

"When the going gets rough, and orders are hard to find, do you pull your salesmen in off the road, and have the telephone taken out? Well, it would cut expenses."

Let us assume that the manufacturer with the advice of his agency has decided to earmark one-quarter of one per cent of the total sales for advertising. The following table prepared by the Association of National Advertisers is indicative of the amount of money voted.

Table III Difference between Retail and Lumber Product Appropriations

	Average Selling Cost	% of Total Sales Expended in Advertising	Advertising Charged to Selling Expense
Lumber (retail)	14%	1%	yes
Lumber Products	5%	2%	yes

The agency then places an executive in charge of the account. His first job is research. He must study the consumer practices of buying, the preferences of the public in regard to his product, the present market, the channels of distribution, the potential market, the company's sales plans and organization, the merchandising policies of the company, and the inner workings of competitors.

Fortified with this knowledge, the account executive who is usually the writer of advertising copy, shuts himself up in his office, and between conferences, telephone calls, and constant disturbances, dashes off some copy written to the tune of an outstanding theme. The copy is based upon this central idea, which he believes is timely and attractive enough to strike the public in such a vein that the sales graph will start to climb. The "Save the Surface" campaign sponsored by the paint manufacturers was a tremendous success because its central idea struck a favorable chord in the people's mind - "Save the surface and you save all."

While the copywriter is scouring his mind for words which, when fashioned together, will express coherence, clearness, emphasis, and unity, he has conferences with the layout man. This artist of visualization works out a design that will not only express the theme of the idea, but will also be pleasing to the eye. He must make rough sketches of the illustration and blue print the various ingredients of the advertisement.

An artist is then called in and acquainted with the future illustration. He must express with his art that which the copywriter expresses with his words. With numerous revisions, and a final approval by a vice president, the executive in charge of the account takes his work over to the manufacturer and attempts to convince him that this advertisement is just what he needs. Many times the manufacturer doesn't understand how this fabricated advertisement is going to help his sales. He expresses his ideas to the account executive, who with tact and salesmanship demonstrates the probabilities and possibilities.

Finally, with a few minor changes, the advertisement is approved by the manufacturer, and the next big job is to prepare a medium schedule. In many large agencies an expert on media is present to answer all the questions put to him by copywriters and others. He knows how many lumber magazines there are and their circulations. He can tell whether it is cheaper to run a

specific advertisement in The American Lumberman or in the Hardwood Record. Of incalculable aid to him are the reports of the Audit Bureau of Circulation. For thirty dollars per year, the media specialist has access to magazine and newspaper authentic circulations. Many publications have extensive marketing and research departments always busy in endeavoring to uncover figures that will prove how effective a medium their organ is.

The answers to the following questions determine to a large extent what media to use:

(1) How many people are you desirous of reaching and where are they situated?

(2) Is the message timely and will it require an illustration?

(3) How much money is available for the campaign?

(4) How much does it cost to reach the potential consumer through the pages of this medium?

(5) What type of reader has this publication?

When the media are selected, a magazine and newspaper schedule is prepared. These schedules show when the advertisements will be run. However, before this is done, the agency will make test insertions on a small group. The results of these experiments interpret for the agency the success or failure of the advertisement. If the tests show that it is only mediocre, all the integral parts are checked and mistakes corrected. If the account executive decides that his idea just does-

n't strike a responsive tone, he may scrap the entire work and develop a new theme.

The copy testing successfully completed, the ads are run off according to schedule, and the advertiser sits back and waits for results. While the campaign usually has a single theme and all advertisements center around its expression, each is different; and yet the same - different in that the words and illustrations must be changed so as not to bore Mr. Public; but the same in that Mr. Public must recognize the ad by its theme and not by the advertiser's name.

Coupons and surveys often show the interest of the consumer in response to the series of advertisements, but the sales curve alone demonstrates whether this advertising is doing your business any good. This practical conclusion expresses itself in the following ingredients that make an advertisement successful:

- (1) It must be aimed at something specific.
- (2) It must neither talk up nor down.
- (3) It must be followed up. Sporadic advertising is soon forgotten.
- (4) It must be tested.
- (5) It must make people want to buy.

The method of payment to the advertising agency is unique. The media in which these ads appear support the agency in the form of a commission, usually fifteen per cent of the space bought. The advertiser pays only for

the space, cuts, and extraordinary art work connected with his campaign. Although this is true for most consumer national advertising, it doesn't hold for trade journal and local advertising. It is only fair that the agency receive remuneration commensurate with its work and ability. National consumer magazines charge a great deal for insertions; while trade and local media, having small circulations charge much less; therefore, since it requires just as much time and work to prepare copy for trade journals, agencies usually insist on additional fees. The Saturday Evening Post charges eight thousand dollars per black and white page, less ten per cent, and fifteen thousand dollars less ten per cent for the back cover of one issue. The American Lumberman, on the other hand, receives only two hundred twenty-five dollars per page less fifteen per cent for space in the reading matter section, which it considers as the choicest position.

Market Analysis

It is impossible for advertising to be successful unless it is based on the results of market analysis. By this is not meant that all advertising fabricated from market research is bound to obtain more sales. Too many factors enter in to determine the success or failure of a certain series of advertisements. But when campaigns are based on conditions as they are known to exist, one step is taken closer to the realization of success.

The first important item to examine is area consumption. In what regions and industries are lumber and timber products utilized - and to what extent? What proportion of these products are produced in these regions? What portion is subject to interstate commerce?

Table IV Production of Principal Consuming Regions in Percentage of Lumber Consumption

	<u>1928</u>	<u>1934</u>	<u>1936</u>
Northeastern States	16%	22%	22%
Lake States	42%	44%	41%
Central States	16%	25%	25%
South Atlantic States	71%	85%	87%
Southwestern States	34%	44%	42%

Upon examining Table IV, we notice that the principal lumber consuming regions tend to produce a larger proportion of their consumption during a depression. The explanation is that low prices and high transportation costs tend to prohibit long distance shipments. The tendency seems to lean toward more and more self sufficiency. In 1929, producing regions consumed 42% of the national lumber utilization; in 1934, 51%; in 1936, 53%. Intrastate and boundary state commerce accounted for 47.5% of the total distribution in 1928; 56% in 1934; and 60% in 1936. The significance of these figures is apparent if this tendency continues. There will be less competition between southern pine and Douglas

fir in the northeastern United States markets and more competition between individual producers for home markets where the elimination of the high cost of transportation will place lumber in a better bargaining position in competition with substitute materials.

Lumbermen with trade marked products would be wise in acquainting the sectional population with the advantages of buying their manufactures. Because most of the lumber sawed is not trade marked, it is impossible to build brand preference; but those mills that have foreseen the desirability of using modern merchandising methods in the sale of their products, will have a distinct advantage in home markets. Advertising is the most economical means of building brand preference.

Table V Railroad Distribution of Lumber - Percentage of Total Distribution

	1928	1934	1936
Shipments on Long Hauls	30%	24%	20%
Shipments on Transcontinental	20%	17%	19%
Shipments on Short Hauls	18%	18%	16%
Shipments on Intrastate	32%	41%	45%

Table V demonstrates that 32% of the total rail shipments were intrastate in 1928; 41% in 1934; 45% in 1936. In the great consuming centers of the northeast, the fight

for markets will be interindustrial, between lumber, cement, steel, stone, and brick. In the great producing centers of the south and Pacific regions, the fight for markets will be intraindustrial, between individual manufacturers of lumber and wood products.

While interpreting consumption trends, it is important that we not be misled by astounding figures. Many lumber pessimists point to the great drop in the individual's consumption of lumber: from 523 board feet in 1906 to 177 board feet in 1936. It would be foolish to ignore this great decrease in the use of lumber and wood products. It would be equally as foolish not to remember the great increase in population during this period. Actually, the loss is less than the figures portray.

Table VI, when analyzed, reveals the same discrepancy.

Table VI 1934 Average Consumption per Capita by Regions

Region	Feet	Region	Feet
New England	98	East Gulf	93
Middle Atlantic	82	Lower Mississippi	99
Lake	117	North Pacific Coast	638
Central	91	South Pacific Coast	248
Prairie	85	North Rocky Mountain	338
South Atlantic	91	South Rocky Mountain	142

The north Pacific coast, for instance, shows a consumption of 638 feet for each individual; but does not take into consideration that much of the box shooks, an important item of manufacture, are fabricated (therefore consumed in this region) into boxes and shipped out of the north Pacific coast to fruit and food centers. The middle Atlantic states only consume 82 feet per individual. When hastily examined, one might pass this region up as a slack market. But when the tremendous population of these states are taken into consideration, one can realize that this region is well worth cultivating.

There are many appeals used in advertising. People can be stimulated to buy lumber as well as other products by appealing to their emotions or to their intelligence. The former when incorporated into words is termed "emotional" copy; the latter, "reason-why" copy. Since there is a tendency for the producing regions to consume more and more of their products within their boundaries, the question of prime importance is what method of appeal should be used to expand this market? The United States Forest Service estimates that the consumer paid 27.54% of the price of lumber for transportation in 1936. Lumber at home has a distinct advantage over substitute materials in the form of price; therefore, price appeal would be of tremendous advantage in advertising in the producing region.

This is not the case in the densely populated northeast where lumber has to be shipped from the south and the Pacific regions to satisfy the demand. Here the 27.54% of the retail price in the form of transportation places lumber in a less favorable bargaining position. Its price has gone up more than one-quarter. In this great industrial region, price appeal is weak. Advertising copy must show the consumer that price isn't everything, that wood is an American tradition, that more than eighty million people, who live in homes built of wood, can't be wrong.

It is obvious that national advertising through magazines can not integrate these separate appeals; for what would be true on the west coast would not necessarily be true in the northeast. Cooperative advertising between manufacturer and dealer is the solution. In each community, the appropriate appeal can be incorporated in the advertising copy through the medium of dealer aids.

Table VII shows the channels through which lumber and timber products flow before they reach the ultimate consumer.

Before he can intelligently pick the medium in which to make advertising insertions, the manufacturer must know where his product goes before it reaches the ultimate consumer. He must know whose friendship and patronage to cultivate. Table VII demonstrates that 49% of the lumber sold passes through the hands of wholesalers.

Table VII Distribution of Mill Sales in 1929

	Quantity M Bd. Ft.	% of Quan- tity	Value	% of Value
Total Sales by Mills	26,617,151	100.0	\$740,865,000	100.0
Sales to Manufacturers	3,674,124	13.8	128,786,000	17.4
Interplant Transfers	1,162,920	4.4	30,817,000	4.2
Sales to railroads, Public Utilities, and Contractors	1,241,447	4.7	32,872,000	4.4
Sales through Branch Wholesale Establishments	1,246,287	4.7	29,837,000	4.0
Sales through Brokers and Commission Houses	3,729,967	14.0	94,909,000	12.8
Sales through Wholesalers and Jobbers	8,034,956	30.2	212,783,000	28.7
Sales for Export	2,254,156	8.4	61,876,000	8.3
Sales to Retailers, incl. manufacturer Owned Yards	3,971,719	14.9	115,423,000	15.6
Local Sales	1,250,909	4.7	32,307,000	4.4
Sales to other Industrial Consumers	50,666	.2	1,260,000	.2

This omits the export orders that are filled by wholesale establishments. It is obvious that this middleman is a very important factor in the distribution of lumber from the manufacturer to the ultimate consumer.

Advertising to the wholesaler must convince him that the manufacturer really has a good product and is eager to have the middleman make bigger and better sales. As explained before, the type of copy used is called "reason-

why" copy. Emotional appeals seldom have an effect. The hard-headed business man wants to know how he can make more money.

Before the lumber industry can address its advertisements intelligently, it must know what uses the yearly production figures embrace. Table VIII demonstrates that fully 60% of the 1937 lumber production was consumed in general building and construction.

Table VIII Proportion of Lumber and Timber Product Uses in 1937

Use	Percentage of Production
Building & General Construction	60.0
Railroads	12.0
Boxes & Crates	13.0
Veneers & Plywood	5.0
Furniture	5.0
Automobile Construction & Repair	1.6
Caskets	.5
Miscellaneous	2.9

This industry, therefore, is the greatest market for lumber. It is in this field that the greatest opportunity lies for research coupled with trade promotion through

advertising. During the last few years it has been greatly publicized that fully one-third of the United States population is ill-housed. These people obviously lack money to build even moderately priced homes. Many experts believe that mass production of homes is the only solution to the low cost housing problem. It is to lumber's advantage to be ahead of the substitute materials in cultivating this vast market.

Thirty-three cents out of every construction dollar goes to pay for materials, many of which, because of high pressure or consistent advertising, have pushed lumber into the background. The accurate approach toward solving this advertising problem lies in interpreting building data. The United States Bureau of Census published figures on the construction industry in 1935. This compendium is invaluable in ferreting out data on which to base advertising copy. Advertising based on accurate information is the best foundation for a good trade promotion campaign.

Media

There are four general classes of advertising media:

1. Publications.
2. Direct advertising.
3. Signs or mass media.
4. Radio.

Advertising in the lumber manufacturer and association field is almost always confined to publications

and direct advertising. There exist two divisions of publications: magazines and newspapers.

Newspapers are unimportant in lumber manufacturer advertising. In 1937, the Southern Pine Association spent twenty thousand dollars on newspapers, but did very little in 1938. Media Records, Incorporated, of New York City, whose business is confined to the collection of data on newspapers only, lists the Southern Pine Association as the only lumber association spending money on newspaper advertising in 1937. Nor was any manufacturer included. Eliminating newspapers as an important medium of lumber advertising, magazines must provide the suitable environment for the biggest portion of the lumber advertising dollar. Magazines are classified in numerous ways, but for the purpose of analyzing lumber advertising, we may conveniently divide them two ways:

1. General magazines.
2. Business papers.

In 1938, general magazine appropriations were very meager. The Western Pine Association with around fifty thousand dollars, Weyerhaeuser with twenty thousand dollars, and the Red Cedar Shingle Bureau with twenty-five thousand dollars, sums up the important ones for that year. In contrast, thirteen companies spent twenty thousand dollars or more advertising lumber in national magazines in 1929. In 1933 and in 1934, however, not

one of these thirteen companies or any other lumber advertiser spent twenty thousand dollars or more. It is apparent that violent fluctuations occur in advertising lumber. Primarily, the reason is that the price of lumber fluctuates violently. During a depression, the demand falls off and the price drops. Because of low profits or deficits, the individual is forced to discontinue or cut his advertising in order to economize. In a period of prosperity, on the other hand, prices rise and profits increase; therefore, the company or association feels that it can allow itself a larger advertising appropriation for that year.

There is another important reason for cutting national magazine advertising down to nothing in hard times. Lumber is advertised primarily in business papers. Here, the contractor, builder, architect, furniture manufacturer, wholesaler, lumber retailer, railroad supply purchaser, box fabricator, etc., is told the advantages of buying your products. Each one of these business and professional men controls the buying power of many ultimate consumers. The above reason coupled with the fact that advertising space is many times cheaper in business papers, compels users of general magazines to cut their experiments in trying for more business by consumer pressure on the dealer. Advertising builds desire for the product featured; and when the consumer asks for

it, at his dealer's, the resulting pressure increases the manufacturer's sales. So goes the theory.

Too much of one and too little of the other is a bad policy for any firm to pursue. The following story published in "Wood Construction," The National Lumber Forum, is illustrative of this point:

"The first really national advertising campaign in the building industry was in behalf of a pioneer wallboard known as 'Beaver Board.' Customers still go to the lumber yards and ask for 'Beaver Board,' though it has been many years since there was any 'Beaver Board' in existence.

"When the customers ask for 'Beaver Board' they are sold wallboards of a dozen other types, and they go away happy.

"Thereby hangs a moral and a wonderful experience lesson in the marketing of building materials.

"The advertising campaign for the Beaver Board Company was a marvelously scientific and comprehensive trade promotion program. In magnitude, scope, and skillful preparation of copy, it was perfect. But it harbored one fatal defect.

"The campaign concentrated upon selling 'Beaver Board' to the general public. It was the theory that the general public, the ultimate consumer, educated by advertising in magazines of general circulation, would demand 'Beaver Board,' and the dealers would be compelled to stock it, instead of something 'just as good.'

"The advertising campaign for 'Beaver Board' achieved its purpose all right. The consumers were educated to think of wallboard, under the name of 'Beaver Board,' when they thought of wallboard at all. They were educated to go to the yard and ask for 'Beaver Board,' but the campaign failed to force dealer distribution through pressure of consumer demand.

"The fatal mistake in the advertising campaign was the fact that the consumer is not interested actually in raw products, out of which the completed commodities he uses are made. Consequently, when asked for 'Beaver Board,' the dealer was easily able to persuade him to buy some competing wallboard whose advertising campaign had concentrated upon the dealer.

"The consumer took the dealer's advice as to the relative merits of wallboards.

"So the Beaver Board Company is out of existence and its competitors and successors are going merrily ahead with sales that far surpass those of the pioneer.

"And the moral of that is if you are trying to find something in the cellar, it doesn't pay to look for it in the parlor, just because the light is better in the parlor."

The above story about "Beaver Board" has never been proved to be true in its relation to lumber; not because the same principles of marketing do not hold for lumber as for wallboard, but because it is very uncommon to thumb the pages of general magazines and find a lumber advertisement. In other words, very few lumbermen have tried consumer advertising.

Many observers lament the fact that lumber is not strongly advertised in general magazines by individual companies. It can be assuredly answered that this can only come after certain practices are standardized in the lumber industry. For instance, it would be foolish for a lumber manufacturer to advertise his lumber to consumers if it were unidentified. How can the dealer know whose lumber he is selling if it is not trade-marked? Because of the absence of trade marking, the producers of this lumber feel that advertising in general magazines is a waste of money since they advertise all lumber and not just their product.

Since it is only eleven years that the first trade-marked lumber was placed on the market by Weyerhaeuser, and since eight of these years have been very lean for the lumber industry, it is not surprising that general magazine appropriations have been limited.

While these observations concerning trade marking are true for lumber manufacturers, they do not hold for lumber manufacturers' associations because they advertise species, or the national association because it advertises lumber. There are great possibilities open for association advertising in general magazines. Advertising in an educational manner to demonstrate the role that lumber plays in the consumer's life will pay great dividends in increased consumption of lumber.

The Western Pine Association is the only regional association advertising lumber in general magazines. If the remaining associations were to decide to advertise their product aggressively in the same media, there would be an intense competition and the good results derived from this publicity would be largely offset by the division of public attention. The first step to be taken is to have the national association advertise how good lumber is in comparison with substitute materials. After a few years of winning converts to the side of wood, then would be the time for the regional associations to explain in a weakly competitive manner how good the species they handle are.

By "weakly competitive" is meant that the accent on clashing uses and interests should be avoided. After all, the primary spearhead of the offense should be directed towards substitute materials. Correspondence conferences on copy would be a simple method of avoiding too strong a competition.

Trade Journals

While the lumber associations are relatively inactive in general magazine and trade journal advertising, the greater proportion of lumber advertising takes place in business papers. The agencies promoting this are the lumber manufacturers. Lumber associations, in contrast to the above statement, did spend considerably more than they do now. Four hundred and ten pages of advertising were used in seventy-one general and farm paper publications and fifty technical and trade publications in 1929.

Table IX 1929 Advertising Expenditures for Five Associations

National Lumber Manufacturer's Ass'n	\$250,000
Southern Pine Association	80,500
Southern Cypress Association	66,800
Northern Hemlock & Hardwood Manuf. Ass'n	25,670
Western Pine Association	10,000

The theme was educating the people to demand grade-marked lumber. The association guaranteed that the lumber carrying the grade-mark was manufactured in accordance with the American lumber standards recommended by the United States government.

In 1934, cooperation between the National Lumber Manufacturer's Association and the National Retail Lum-

berman's Association resulted in a campaign to sell the complete unit. This was to be done by aiding the retailer with advertising and a plan service. In order to complete the bargain, a publication "Lumber Merchandising News" was born in which the dealer is incessantly advised to advertise steadily and not in splurges. Through it, he is aided in his direct and indirect advertising problems. This cooperation led to a purchase of three thousand column inches in 1935. This advertising service is periodically laid before twenty thousand dealers. Approximately two thousand five hundred merchants are availing themselves of this service, which has three hundred forty thousand pieces of direct mail advertising on hand.

The American Lumberman is a typical lumber trade journal. In the following tabular form, the rates and positions of advertising matter are shown:

Table X American Lumberman Advertising Rates

Rates per Insertion	1 time	4 times	13 times	26 times
Rates for Space in Section Preceding Reading Matter				
1 page	\$175.00	\$162.50	\$128.84	\$121.15
1/2 page	90.00	85.00	69.23	64.42
1/4 page (minimum)	50.00	43.75	36.54	34.62
Rates in Reading Matter Section (Alongside & Opposite Reading Matter)				
3 cols. one page	225.00	175.00	153.85	146.15
2 columns	150.00	118.00	106.15	105.77
1 column	75.00	60.00	53.46	53.08
1/2 column	40.00	31.25	30.38	26.73
1/4 column	22.50	18.75	16.92	15.19
1/8 column	15.00	10.50	10.38	8.46
Rates in Section Following Reading Matter				
1 page	150.00	130.00	107.69	100.00
1/2 page	80.00	65.00	57.69	53.85
1/4 page	42.50	37.50	30.77	28.84
1/8 page	22.50	20.00	17.30	15.38
1/16 page	12.00	10.63	9.62	8.65

Space alongside and opposite reading matter is considered more valuable than space preceding or following the reading matter, and buyers pay more for advertisements preceding the reading matter than they do for space following the reading matter.

An interesting sidelight on the "American Lumberman" is that its manager, E. C. Hale, estimates that the cost of printing a paper runs about 25% and the balance of the cost is made up of items such as rent, postage, office supplies, salaries, telephone and telegraph charges, and "a thousand and one other things that you don't think of when you are starting out to publish a paper, but you find they amount to a considerable sum at the close of the year."

Mr. Hale states that profits have been very low in the publishing business in all its branches, which can be verified by the low prices of publication stocks on the exchange, and that competition is very keen. He further emphasizes the lack of security and encouragement "whose presence is so essential to the publishing business."

In contrast to the seemingly reasonable cost of space in the trade journals, the following table demonstrates the variety of cost in the general and class magazines.

The "American Lumberman" had a circulation of 8,565 in 1932. Its average rate was \$183.00 per page for one

Table XI General and Class Magazine Rates - 1932

Magazine	Circulation	Cost per Page	Rate per Page per 1000
American Boy	362,000	\$2,000	\$ 5.80
American Magazine	2,279,000	5,000	2.22
American Mercury	62,000	350	5.64
Charm	84,000	800	9.52
Collier's	2,257,000	5,500	2.43
Cosmopolitan	1,591,000	4,800	3.00
Country Life	37,000	500	16.20
Elks Magazine	850,000	2,000	2.35
Good House- keeping	1,767,000	5,600	3.16
Harper's Bazaar	103,000	1,400	13.60
Harper's Magazine	121,000	440	3.63
House Beautiful	105,000	1,000	9.50
Ladies Home Journal	2,582,000	9,500	3.68
Liberty	2,415,000	4,250	1.77
Literary Digest	1,602,000	4,000	2.50
McCall's Magazine	2,505,000	8,800	3.51

Table XI continued

Magazine	Circulation	Cost per Page	Rate per Page per 1000
Pictorial Review	2,502,000	\$8,800	\$ 3.51
Saturday Evening Post	2,924,000	8,000	2.74
True Story	2,110,000	4,500	2.13
Vogue	134,000	1,500	11.20
Woman's Home Companion	2,606,000	9,400	3.61

insertion. The rate per page per thousand circulation was \$21.36. Because each reader of the "American Lumberman" is a potential customer and usually controls the buying power of many consumers, lumbermen in general feel that they obtain more for their money when they advertise in this trade journal, than when they use a medium like the Saturday Evening Post, even though they pay almost eight times more per reader reached.

Choice between Publications

The relative effectiveness of competitive publications is a very difficult problem to solve. The following determinants are usually laid down in advertising text books as the yardsticks with which to measure media.

1. Circulation (net paid).
2. Results obtained by other advertisers.
3. Amount of increase in space or time used.
4. Testing.
5. Number of advertisers using media.

Suffice it to say that of all these criteria, testing is the best because no two merchandising problems are the same. When merchandising differs, results differ. In theory, it is possible to determine the value of a publication at so many dollars and cents per thousand readers. One can figure the reader's income, tabulate his desires, and do everything under the sun to establish a definite value for each publication. But certain intangible forces are always at work to offset theories, so the reliable way to compare media is by actual tests.

Advantages of Magazine Advertising

Hugh E. Agnew in his book, Advertising Media (D. Van Nostrand Company, Inc., New York, 1932), lists the following as the advantages of magazines:

"1. Magazine advertising carries so much prestige that it is regarded as authoritative by both dealers and consumers.

"2. The national coverage of magazines is even and effective. Everywhere the most desirable prospects can be reached through magazines.

"3. The graphic presentation of advertising in magazines is limited only by the skill of the printer and engraver. Nowhere are illustrations in advertisements better presented than in magazine pages.

"4. The life of a magazine is long. Advertisers using coupons in their magazine advertising find it advisable to keep records of returns open for at least two years.

"5. A large number of magazines are read and passed on to other families. This gives a supplementary circulation that is valuable to many advertisers.

"6. Magazine advertising has a compelling effect on dealers - they believe that it will bring results and cooperate with magazine campaigns.

"7. In terms of pages distributed to each thousand people, magazine advertising is low in cost.

"8. Magazines cover so many specialized fields that it is possible to reach markets profitably through periodicals that could not be cultivated in other media. This is another way of indicating that magazine readers are more homogeneous than those of any other medium except direct mail."

Continuing, Agnew lists the following as the disadvantages of magazine advertising:

"1. Magazine advertising is inelastic. The same message is presented to everyone regardless of climatic conditions, or local preferences and prejudices. No variations for seasons or for vagaries of weather can be made.

"2. Closing dates are often so far away that conditions have changed by the time the advertisement appears. When the Curtis Publishing Company changed the Country Gentleman from a weekly to a monthly, they were unable to correct an advertisement in the Saturday Evening Post - another of their publications - and two weeks after the announcement of the change was made, the Post came out with an advertisement describing the attractions of the Country Gentleman, published "weekly."

"3. Magazines have become so numerous that a fortune is required to carry an effective campaign in them. There are a few exceptions like the "orange blossom" wedding ring, to which reference has been made, but fifty thousand dollars is regarded as about the minimum for a national periodical campaign.

"4. Unless an advertiser has national distribution, he will lose much of the effect of his magazine advertising. More and more the magazines are becoming the medium of big business.

"5. Art work and engravings cost so much for magazine advertising that they often become a burden. The mechanical standards are so high, that unless an advertiser employs high grade mechanical presentation, his offering will be unattractive and so, ineffective in most magazines."

Direct Advertising

As was shown before, lumber manufacturer associations, with few exceptions, do relatively very little publication advertising now. Most of their work is confined to cooperative efforts - subscribing dealers' helps.

Progressive lumber manufacturers also use direct advertising to good advantage.

Table XII How the 1929 Industrial Advertising Dollar Was Spent

Ratio of advertising expense to sales - 1928.....2.24
Ratio of advertising expense to sales - 1929.....2.32

Business and trade papers (space only)	46.00%
Artwork, engraving, etc. (for ads only)	7.00
Sales & service literature (except direct mail)	9.00
Direct mail advertising	13.00
House organs	2.00
Conventions & exhibits	4.00
Moving pictures & photography	1.00
Administrative expense (including salaries)	9.00
Price lists and internal publications	2.00
National advertising	4.00
Miscellaneous	3.00

Table XII shows that direct mail advertising consumed 13% of the industrial advertising dollar. Lumber manufacturers maintain regular mailing schedules and pass on information that will create sales. Weyerhaeuser

uses a definite advertising technique. It interests a buyer by showing him how much more money he could make if he handled Weyerhaeuser products. Lumber associations, although not engaging in quotations and the like employ advertising agencies to prepare sales literature which they mail regularly to their subscribers for distribution to the general public.

The California Redwood Association was confronted with a problem of selling odd lengths in 1938. They prepared a booklet showing how beautiful redwood fences are. They also incorporated six new designs of homes with fence decoration. One thousand of these booklets were sold at newsstands for twenty-five cents per copy (they cost \$.183). Eleven thousand were sold to lumber dealers for ten cents.

The shape and form of direct advertising varies with the policy of the company, the material covered, and the consumer addressed. The Southern Pine Association has done a great deal of work these last few years in acquainting the public with the quality of its product. The reader may examine some of the smaller specimens in the rear envelope of this paper. In order to gain some impression along what lines progressive companies like Weyerhaeuser use their direct advertising, we will examine a few of its publications.

The "High Cost of Cheap Construction" is a sixty-one-page comprehensive treatise on good house construc-

tion. It has numerous drawings contrasting the good and bad points in building technique. "Financing New Homes" is the story of Weyerhaeuser's new system of credit. It explains a new, easy way to finance the complete unit at the lumber dealer's office.

"Eleven Plus Values of 4 Square Lumber" leans more toward the sales and away from the educational. Other material runs the gamut from flattering the farmer with exquisite illustrations and large size type to installment selling in the lumber yard; from technical specifications of house framing to advertising aids.

The Southern Pine Association has prepared quite a few technical publications for engineers and architects. One of its most attractive pamphlets is entitled, "Livable Homes of Southern Pine" in which twenty plans of homes are shown with pictures of the complete unit. It has much charm and simplicity and is sure to attract home lovers.

Radio

There are very few lumber manufacturers, if any, who employ radio as a selling aid. They may prepare short talks for the use of their dealers; but they actually do not sponsor a program.

In fact, very few industrial goods are sold through this medium. In order to examine the possibilities of exploiting radio as a means of selling lumber, let us examine some of the vital statistics concerning this in-spite-of-the-depression growing industry.

Table XIII Network Gross Client Expenditures

Year	National Broadcasting Company	Columbia Broadcasting Company	Mutual Broadcasting Company
1927	\$ 3,760,010	\$	\$
1928	8,780,333	1,447,398	
1929	14,310,382	4,785,981	
1930	20,088,887	7,605,203	
1931	25,607,041	11,895,039	
1932	26,504,891	12,601,885	
1933	21,452,732	10,063,566	
1934	27,833,616	14,825,845	
1935	31,148,931	17,637,807	*1,293,103
1936	34,523,950	23,168,148	*1,987,573
1937	38,651,286	28,722,118	2,239,076

*computed as net income in 1935 and 1936.

In eleven years' time, expenditures for radio advertising increased from \$3,760,010 to \$69,612,480. The Lady Esther Company demonstrates a triumph in merchandising by means of radio. Its products were unknown in 1930. In 1931, this company spent about six or eight thousand dollars for radio facilities and talent.

Said Mr. Seir Dieffendorf of the Columbia Broadcasting system:

"By 1934, with four half-hour programs on Columbia and the National Broadcasting Company, the Lady Esther Company was appropriating well over one million dollars for radio facilities and talent. Directly on the heels of these expenditures, the sales of Lady Esther face powder began a sensational climb to sales dominance. In the only survey of face powder sales we know of, Lady Esther moved from fifteenth place in 1932 to first place among popular brands in 1934. The progression marks an increase from one per cent of all face powder sold in 1932 to over seventeen per cent of the face powder sold in 1934 - a mighty story for radio. For over ninety-six per cent of all Lady Esther advertising from 1931 to June, 1934 went into broadcasting."

It is interesting to examine the breakdown of radio expenditures by industries. Upon examination of Table XIV, we see that only three building materials manufacturers spent .61 per cent of the total money spent over the National Broadcasting Company in 1937. Drugs and toilet goods and foods and food beverages accounted for almost sixty-three per cent.

In January, 1937, there were 24,500,000 radio homes in the United States. With this great coverage, still increasing every year, it is easy to visualize that lumber companies might do well to examine this medium in great detail.

The human individual is lazy. He likes to have other people do things for him. Dr. Paul Rankin of Ohio State University in 1929 reported, on a study of communicative behavior only, that adults spend forty-five per cent of such activity in listening, thirty per cent in

Table XIV 1937 Revenue by Industries on National
Broadcasting Company

Classification	Total Gross Expenditures	Number of Advertisers	% of Total
Automotive	\$ 2,726,825	6	7.06
Building Materials	235,989	3	.61
Cigars, Cigarettes, & Tobacco	1,716,638	5	4.44
Drug & Toilet Goods	13,322,990	32	34.47
Foods & Food Beverages	11,008,762	29	28.48
Laundry Soaps & Cleaners	3,392,383	10	8.78
Others			16.16

talking, sixteen per cent in reading, nine per cent in writing. In other words, people listen almost three times as long to what you have to say than they expend in reading what you write. As radio becomes more and more entertaining, the family spends more and more of its leisure hours the easy way - listening.

In 1932, average Americans spent 4.1 hours daily listening to their radios. In 1936, 5.1 hours.

In 1938, sixty-nine per cent of all the lumber production went into building and construction. The majority of radios are in the home. They are a symbol of comfort, relaxation, and peace. Into this peaceful scene come pouring commercials dealing with soap, foods, and drugs.

There are no more perfect auditors for a nice friendly talk about a new home than a man and his wife mellowed by a fine meal, listening to the radio.

The lumber industry, if it feels itself unable to sponsor real talent over a coast-to-coast hookup, can do a number of things. They have done one. As was mentioned before, Weyerhaeuser provides dealers with copies of short (thirty-second) radio announcements. Listeners feel cheated when they have to accept commercials without entertainment, and are resentful of the intrusion. The following is a spot announcement picked at random:

"A stitch in time saves nine and the prompt repair of your home saves money. Ask the _____ Lumber Company about the ABC Plan. You don't need cash because the ABC Plan provides the money and easy monthly payments are arranged for your convenience. Phone _____ about the ABC Plan for home repairs. No down payment required."

Probably the least costly and most productive way to sponsor a prestige building program with real talent and an opportunity to stimulate home ownership is by means of a cooperative venture. The industry should sound out other building material manufacturers and those industries directly benefited by expanded residential building. Under competent leadership and with competitive instincts sacrificed for the moment, a radio program, jointly sponsored, might well be the start of an upturned sales curve for all.

The Jell-O program, sponsored by General Foods Corporation, and ably handled by Young & Rubecain, Inc., advertising agency, cost \$522,574 in 1937. It features Jack Benny, who has been judged the most popular comedian on the air for a good many years.

The Chase & Sanborn program, sponsored by Standard Brands, Inc., and handled by the J. Walter Thompson Company, cost \$788,440 in 1937. From the cooperative analysis of broadcasting records embracing October, 1937 to April, 1938, this was the most popular program on the air. The Jell-O broadcast was second.

Five hundred thousand dollars should not be very difficult to assemble from the many industries that profit directly from increased construction. For this money, an attractive, educational, and entertaining program can be fabricated. People who are now constantly being told to eat such and such beans and use so and so's facial cream would gladly welcome information about every man's dream - a home of his own.

Publication List

In the following pages is a list of various types of publications - farm, general, home and garden, etc., which may be used by the lumber industry for advertising purposes.

MediaAgricultural Publications with over 50,000 Circulation

Name	Where Published	How Often	Circulation
Progressive Farmer and Southern Ruralist	Birmingham, Ala.	Mo.	963,571
Southern Farmer	Montgomery, Ala.	Mo.	698,174
Arkansas Farmer	Little Rock	Mo.	68,166
California Cultivator	Los Angeles	Bi-wkly	62,916
Pacific Rural Press and Calif. Farmer	San Francisco	Wkly	81,267
Western Farm Life	Denver, Colo.	Semi-mo.	106,968
Florida Farm & Grove	Jacksonville	Mo.	80,435
American Poultry Journal	Chicago	Mo.	414,568
Prairie Farmer	Chicago	Bi-wkly	331,277
Poultry Tribune	Mt. Morris, Ill.	Mo.	438,663
Modern Agriculture	St. Charles, Ill.	Bi-mo.	1,500,000
Nation's Agriculture	Ft. Wayne, Ind.	Mo.	414,958*
Indiana Farmer's Guide	Huntington	Ftntly	144,793
Hoosier Farmer	Indianapolis	Mo.	51,052

*controlled free distribution

Name	Where Published	How Often	Circulation
Breeders Gazette	Spencer, Ind.	Mo.	163,556
Successful Farming	Des Moines, Ia.	Mo.	1,096,746
Wallace's Farmer & Iowa Homestead	Des Moines, Ia.	Mtntly	271,283
Capper's Farmer	Topeka, Kans.	Mo.	1,135,122
*Capper's Weekly	Topeka, Kans.	Wkly	392,112
Kansas Farmer	Topeka, Kans.	Mtntly	113,384
Missouri Ruralist	Topeka, Kans.	Mtntly	126,217
Kentucky Farmer's Home Journal	Louisville	Mo.	62,138
American Cotton Grower	New Orleans	Mo.	195,002
New England Homestead	Springfield, Mass.	Mtntly	104,428
Michigan Farmer	Detroit	Mtntly	148,502
The Farmer	St. Paul	Mtntly	257,224
Farmer's Union Herald	St. Paul	Mo.	103,918
Farmer's Wife	St. Paul	Mo.	1,169,312
Cloverleaf American Review	Winona, Minn.	Mo.	429,114
Home Circle	Winona, Minn.	Mo.	528,087
Coop Farmer	Jackson, Miss.	Mo.	104,603

*newspaper

Name	Where Published	How Often	Circulation
Dairy Papers Ass'n	Carthage, Mo.	Semi-mo.	121,230
*Star	Kansas City, Mo.	Wkly	451,446
Nebraska Farmer	Lincoln	Ftntly	122,433
U. S. Live Stock News	Omaha, Nebr.	Bi-mo.	84,057
Flower Grower	Albany, N. Y.	Mo.	59,467
American Agriculturist	Ithaca, N. Y.	Bi-wkly	185,912
Country Home Magazine	New York City	Mo.	1,648,271
Rural New Yorker	New York City	Bi-wkly	267,922
American Fruit Grower	Cleveland, Ohio	Mo.	154,710
Ohio Farmer	Cleveland	Ftntly	157,693
Ohio Farm Bureau News	Columbus	Mo.	70,763
Farmer Stockman	Oklahoma City	Semi-mo.	237,660
Everybody's Poultry Magazine	Hanover, Pa.	Mo.	89,738
Country Gentleman	Philadelphia	Mo.	1,839,335
Farm Journal	Philadelphia	Mo.	1,348,156
Pennsylvania Farmer	Pittsburgh	Ftntly	152,879
Poultry Item	Sellersville, Pa.	Mo.	83,854

*newspaper

Name	Where Published	How Often	Circulation
Dakota Farmer	Aberdeen, S. Dak.	Bi-wkly	99,543
Dixie Farm & Poultry Journal	Nashville, Tenn.	Mo.	100,000
Southern Agriculturist	Nashville, Tenn.	Mo.	864,757
Farm & Ranch	Dallas, Texas	Mo.	203,129
*Farm News	Dallas, Texas	Semi-wkly	102,712
Southern Planter	Richmond, Va.	Mo.	290,792
Washington Farmer	Spokane, Wash.	Ftntly	59,633
Hoard's Dairyman	Ft. Atkinson, Wisc.	Semi-mo.	208,057
Wisconsin Agriculturist & Farmer	Racine	Ftntly	185,394

General Magazines (over 1,000,000 circulation)

True Confessions	Greenwich, Conn.	Mo.	1,088,999
National Geographic	Washington, D. C.	Mo.	1,104,220
Pathfinder	Washington, D. C.	Wkly	1,141,706
Blade & Ledger	Chicago	Mo.	1,256,210
Click	Chicago	Mo.	1,179,746
Life	Chicago	Wkly	1,891,789
Rural Progress	Chicago	10 times per year	2,006,627 (free dis- tribution)

*newspaper

Name	Where Published	How Often	Circulation
Look	Des Moines, Ia.	Mthly	1,691,628
Home Friend	Kansas City, Mo.	Mo.	1,208,933
American Magazine	New York City	Mo.	2,175,666
American Weekly	New York City	Wkly	6,759,112
Collier's	New York City	Wkly	2,624,632
Hearst's International Cosmopolitan	New York City	Mo.	1,819,714
Liberty	New York City	Wkly	2,386,845
Red Book	New York City	Mo.	1,164,325
This Week	New York City	Wkly	5,415,299
True Story	New York City	Mo.	2,159,237
Saturday Evening Post	Philadelphia, Pa.	Wkly	3,095,355

Hobbies

Model Builder	New York City	Bi-mo.	73,902
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Home and Garden (over 50,000 circulation)

Sunset Magazine	San Francisco	Mo.	215,788
House and Garden	Greenwich, Conn.	Mo.	149,868
Better Homes & Gardens	Des Moines, Ia.	Mo.	1,719,271

Name	Where Published	How Often	Circulation
Flower Grower	Albany, N. Y.	Mo.	59,467
American Home	New York City	Mo.	1,289,733
Country Home	New York City	Mo.	1,648,271
House Beautiful	New York City	Mo.	167,687

Home Craft

Popular Homecraft	Chicago	Bi-mo.	46,167
Home Craftsman	New York City	Bi-mo.	60,258

Women's Publications (over 1,000,000 circulation)

Household Magazine	Topeka, Kans.	Mo.	1,901,000
Farmer's Wife	St. Paul, Minn.	Mo.	1,169,312
Mother's	Winona, Minn.	Mo.	1,266,172
Good Housekeeping	New York City	Mo.	2,205,459
McCall's Magazine	New York City	Mo.	2,822,001
Pictorial Review	New York City	Mo.	2,862,597
Woman's Home Companion	New York City	Mo.	3,032,449
Woman's World	New York City	Mo.	1,520,879
Ladies' Home Journal	Philadelphia	Mo.	3,044,649

<u>Name</u>	<u>Where Published</u>	<u>How Often</u>	<u>Circulation</u>
Architecture (trade journals)			
California Arts & Architecture	Los Angeles	Mo.	
Southwest Builder & Contractor Architect & Engineer	Los Angeles	Wkly	4,439
	San Francisco	Mo.	
Cathedral Age	Washington	quart.	9,967
Bulletin Michigan Society of Architects	Detroit	Wkly	1,100 400*
Northwest Architect	St. Paul, Minn.	6 times a year	1,245
Architectural Forum	New York City	Mo.	38,376
Architectural Record	New York City	Mo.	21,810
Building & Modernization	New York City	Mo.	345 13,256*
Liturgical Arts	New York City	quart.	
Pencil Points	New York City	Mo.	20,261
Building & Realty News	White Plains	Wkly	802
Builder's Guide	Philadelphia	Wkly	5,000
Pennsylvania Triangle	Philadelphia	Mo.	

*controlled free distribution

Name	Where Published	How Often	Circulation
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Automotive Trade

S. A. E. Journal	New York City	Mo.	6,359
Autobody & the Reconditioned Car	Cincinnati, Ohio	Mo.	10,839
Automotive News	Portland, Ore.	Mo.	4,021*
Automotive Industries	Philadelphia	Wkly	9,748
Chilton Auto Buyer's Guide	Philadelphia	quart.	50 2,621*
Motor Age	Philadelphia	Mo.	28,175

Venetian Blinds

Venetian Blind Dealer	Chicago	Mo.	200 2,700*
American Shade & Awning News	Ft. Worth, Tex.	Mo.	4,879*

Beverages, Brewing, Bottling

Arizona Beverage Journal	Phoenix	Mo.	832 1,801*
Western Beverage	Berkeley, Calif.	Mo.	2,409 3,639*
Western Brewing World	Los Angeles	Mo.	1,353 1,312*
Wine Review	Los Angeles	Mo.	1,514 1,375*
Beverage Industry News	San Francisco	Semi-mo.	6,000 13,000*
West Coast Brewer	San Francisco	Mo.	4,875*

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Name	Where Published	How Often	Circulation
Wines & Vines	San Francisco	Mo.*
Rocky Mountain Beverage Analyst	Denver	Mo.	2,127 4,376*
American Brewer's Review	Chicago	Quart.	34 3,050*
Brewer's Bulletin	Chicago	Semi-wkly	.....
Brewer's Digest	Chicago	Mo.	1,057
Brewer's Journal	Chicago	Mo.	1,438
Brewery Age	Chicago	Mo.	2,083
Mida's Criterion	Chicago	Mo.	5,216
Kentucky Bourbon Magazine	Louisville	Mo.	1,440 320*
American Brewer	New York City	Mo.	1,150
American Wine & Liquor Journal	New York City	Mo.	3,707 1,160*
Modern Brewer	New York City	Mo.	1,698
Spirits	New York City	Mo.	3,613

Boats

Boating Industry	St. Joseph, Mich.	6 times a year	9,000
Motor Boat	New York City	Mo.	27,000
Rudder	New York City	Mo.	17,726

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Name	Where Published	How Often	Circulation
Pacific Motor Boat	Seattle, Wash.	Mo.	5,243 1,295*
Yachting	New York City	Mo.	21,033

Plasterers

Plasterer	Cicero, Ill.	Mo.	22,000
Bricklayer, Mason & Plasterer	Washington	Mo.	67,000
Plastering Craft	Detroit, Mich.	Mo.	1,200 4,600*
Northwest Plastering Industries	Seattle, Wash.	Mo.	1,400

Construction

Industrial Register	Birmingham, Ala.	Wkly	.....
Southwest Builder & Contractor	Los Angeles	Wkly	4,439
Architect & Engineer	San Francisco	Mo.	.....
California Homes	San Francisco	Mo.	10,111
Pacific Builder	San Francisco	Daily	3,007
Pacific Constructor	San Francisco	Wkly	.....
Western Construction News	San Francisco	Mo.	7,218
Rocky Mountain Contractor	Denver, Colo.	Semi-mo.	.....
Commercial Record	New Haven, Conn.	Wkly	3,435

*controlled free distribution

Name	Where Published	How Often	Circulation
Explosive's Engineer	Wilmington, Del.	Mo.	10,138
Constructor	Washington, D. C.	Mo.	3,449
U. S. Gov't Advertiser	Washington, D. C.	Wkly	6,200
Dixie Contractor	Atlanta, Ga.	Wkly	3,552
Industrial Index	Columbus, Ga.	Wkly	.....
American Builder & Building Age	Chicago	Mo.	70,291
Buildings & Bldg. Mgt.	Chicago	13 times a year	3,182
Building	Chicago	Mo.	25,788*
Practical Builder	Chicago	Mo.	6,258 62,069*
Carpenter	Indianapolis, Ind.	Mo.	.....
Central Constructor	Des Moines	Wkly	150 300*
Kansas Construction News	Topeka, Kans.	Wkly	....
Oklahoma Construction News	Topeka, Kans.	Wkly	....
Journal of Commerce	New Orleans	Daily	....
Builder's Weekly Guide	Baltimore, Md.	Wkly	....
Construction	Baltimore, Md.	Daily	1,535 2,726*
Manufacturer's Record	Baltimore, Md.	Mo.	4,679

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Name	Where Published	How Often	Circulation
Michigan Contractor	Detroit, Mich.	Wkly	1,853
Improvement Bulletin	Minneapolis	Wkly	2,745
Mid-west Contractor	Kansas City, Mo.	Wkly	.....
Mississippi Valley Contractor	St. Louis, Mo.	Daily	500
Building & Modernization	New York City	Mo.	345 13,256*
Building Products	New York City	Mo.	47,726*
Building Report	New York City	Mo.	30,000*
Bulletin of Gen'l Contractor's Association	New York City	Mo.	.....
Construction Methods & Equipment	New York City	Mo.	19,987
Contractor's & Engineer's Monthly	New York City	Mo.	383 25,434*
Engineering News Record	New York City	Wkly	31,145
Building & Realty News	White Plains, N. Y.	Wkly	802
Building Witness	Cincinnati, Ohio	Wkly	.....
Builder's Guide	Philadelphia	Wkly	5,000
Record & Guide	Providence, R. I.	Wkly	815
Building Trends	Dallas, Texas	Mo.	100 10,490*
Texas Contractor	Dallas, Texas	Wkly

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Name	Where Published	How Often	Circulation
Texas Architect & Engineer	Ft. Worth, Tex.	Mo.	148 945*
Pacific Builder & Engineer	Seattle, Wash.	Wkly	3,732 400*
Index	Tacoma, Wash.	Daily	365
Western Builder	Milwaukee	Wkly	1,776
Cooperative Builder	Superior, Wisc.	Wkly	12,624

Containers, Barrels, & Packaging

Barrel & Box & Packages	Chicago	Mo.	1,564
Fibre Containers	Chicago	Mo.	925
Official Container Directory	Chicago	Quart.	260 1,730*
Shears	Chicago	Mo.	1,516
Wooden Barrel	St. Louis, Mo.	Mo.	7,335*
National Cooper's Journal	Philadelphia	Mo.	.....

Forestry & Conservation

Trees	Santa Monica, Calif.	Quart.	600 3,900*
American Forests	Washington	Mo.	13,721
Conservation	Washington	Bi-mo.	2,080
Happy Days	Washington	Wkly	40,077

*controlled free distribution

Name	Where Published	How Often	Circulation
Journal of Forestry	Washington	Mo.	4,632
Forest Leaves	Washington	Quart.	.....
University of Washington Forest Club	Seattle	3 times a year	.....

Funeral Directors

Mortician's Digest	Los Angeles	Mo.	1,950*
Mortuary Management	Los Angeles	Mo.	.....
Southern Funeral Director	Atlanta	Mo.	3,006
Funeral Director's Journal	Chicago	Mo.	.....
Modern Mortician	Chicago	Mo.	.....
National Mortician	Chicago	Mo.	20,000*
Mid-Continent Mortician	Minneapolis	Mo.	.....
Eastern States Funeral Director	Boston	Mo.	3,120 300*
American Funeral Director	New York City	Mo.	9,844
Casket & Sunnyside	New York City	Mo.	9,506

Furniture

Western Home Furniture	Los Angeles	Mo.	3,050
Chicago Market Daily	Chicago	Daily	10,219
Twin City Furniture Digest	Minneapolis	Mo.

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Name	Where Published	How Often	Circulation
Furniture Index	Jamestown, N. Y.	Mo.
Furniture Manufacturer	New York City	Mo.	1,496
Furniture World	New York City	Wkly	5,313
Upholstering	New York City	Mo.	.....

Lumber, Bldg. Materials

California Lumber Merchant	Los Angeles	Semi-mo.	.....
Western Building Review	Sacramento, Calif.	Mo.	.....
Southern Lumber Journal	Jacksonville, Fla.	Mo.	2,436 460*
American Lumberman	Chicago	Mtnly	9,944
Building Supply News	Chicago	Mo.	8,451
Hardwood Record	Chicago	Mo.	.....
Wood Products	Chicago	Mo.	4,614* 574
Woodworking Machinery	Chicago	Mo.	12,613*
Illinois Building News	Springfield, Ill.	Mo.	1,500*
Veneers & Plywood	Indianapolis	Mo.	1,225
Wood Worker	Indianapolis	Mo.	3,237
News Flashes	Des Moines	Mo.	1,350*

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Name	Where Published	How Often	Circulation
Northwest News Flashes	Des Moines	Mo.	2,010*
Coagrove's Magazine	Owosso, Mich.	Bi-mo.	4,300
Mississippi Valley Lumberman	Minneapolis	Wkly	.....
Retail Lumberman	Kansas City, Mo.	Mo.	2,902
Lumber Merchant	Lincoln, Nebr.	Mo.	1,200
Building Products	New York City	Mo.	47,726*
Flooring	New York City	Mo.	2,709
New York Lumber Trade Journals	New York City	Semi-mo.	2,122
Lumber Cooperator	Rochester, N.Y.	Mo.	1,500
Wood Construction	Xenia, Ohio	Semi-mo.	1,536 1,598*
Crow's Pacific Coast Lumber Digest	Portland, Ore.	Semi-mo.	.....
Pacific Retail Lumberman	Portland, Ore.	Mo.	1,004 1,511*
Timberman	Portland, Ore.	Mo.	4,228
Plan	Philadelphia	Mo.*
Memphis Lumberman	Memphis, Tenn.	Mo.	2,800*
Southern Lumberman	Nashville, Tenn.	Semi-mo.	2,937
Gulf Coast Lumberman	Houston, Texas	Semi-mo.

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Name	Where Published	How Often	Circulation
West Coast Lumberman	Seattle, Wash.	Mo.	4,394
Western Retail Lumberman	Seattle, Wash.	Mo.	1,018
Lumber & Building Material Dealer	Milwaukee, Wisc.	Mo.	10,033*

Public Utilities

Public Service Magazine	St. Paul, Minn.	Mo.	36,224
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Railroad

Journal of the Pacific R. R. Club	San Francisco	Mo.	1,000
Bulletin of the American Railway Engineering Ass'n	Chicago	Mo.	2,025
Railway Club of Pittsburgh	Pittsburgh, Pa.	Mo.	1,350
Southwestern Railway Journal	Ft. Worth, Tex.	Mo.	6,500
Chesapeake & Ohio Magazine	Huntington, W. Va.	Mo.	34,751
Model Railroader	Wauwatosa, Wisc.	Mo.	8,609
Mass Transportation	Chicago	Mo.	3,873
Railway Engineering & Maintenance	Chicago	Mo.	6,560
Railway Purchases & Stores	Chicago	Mo.	1,163
Pocket List of Railroad Officials	New York City	Quart.	11,253
Railway Electrical Engineer	New York City	Mo.	3,188

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Name	Where Published	How Often	Circulation
Railway Mechanical Engineer	New York City	Mo.	5,323
Transit Journal	New York City	Mo.	4,016
Railway Age	New York City	Wkly	8,560

Roofing

American Roofer	New York City	Mo.
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Telephones & Telegraph

Communications	New York City	Mo.	7,550
Telegraph & Telephone Age	New York City	Mo.	5,982

The Start of Association Advertising Activities

In 1925, the Supreme Court of the United States reversed a lower court decision and exonerated the Maple Flooring Manufacturers Association from charges of trade restraint and price fixing. Justice Stone read the decision in which was included the following sentence:

"The defendants have engaged in many activities to which no exception is taken by the government and which are admittedly beneficial to the industry and to consumers such as cooperative advertising and standardization and improvement of its product."

Cooperative advertising has been used by many industries for many years. To demonstrate that some of

the progressive merchandisers do not even consider competitor advertising detrimental to their selfish ends, the story about the Printz-Beederman Company and the Hart, Schaffner, & Marx Company is very interesting. When an announcement was made by the Hart, Schaffner, & Marx Company that they were to invade the tailored women's wear field, there appeared an advertisement in the trade papers by Printz-Beederman welcoming its competitor wholeheartedly. The former firm believed that another high grade fabricator doing extensive advertising would promote the business to an extent that their own advertising and sales would benefit.

To carry the point a little further, H. E. Agnew, an advertising expert, tells about a dress manufacturer in New York City who asked his competitor to advertise and even offered to sponsor part of its cost. However, the business pride of the competitor would not accept this generous offer. One is led to believe that the offerer might have known beforehand that the offeree would not accept his money. Anyway, the above two cases show an interesting variation of cooperative ideals.

In his book, Cooperative Advertising by Competitors, Mr. Agnew quotes from a letter sent to him by a greeting card manufacturer in answer to a query about the foundation of cooperation in his business. It might well be compared to some of Charles Lamb's essays in its interest.

"Whenever I made a display of cards, I used every precaution to keep my competitors out. I even used to stand in the door with my hip propped against one side and elbow against another to prevent them from coming in to make a surreptitious examination of my stock. I knew that they would go out and buy the designs and then attempt to reproduce them. Usually my attempt to protect my display was only partially successful. The purloining of samples resulted in placing a cheapened and less attractive card in competition with mine. But to be perfectly honest, it was the same thing that I often did myself. If I could pick up an attractive card, I did not hesitate to copy it. If I could improve on it, I did so. If not, I reproduced it as nearly as I could. Like many of my competitors, my reproductions were frequently inferior to the original.

"One day when I was trying to figure out why the greeting card business was so poor and why it was so hard to make a living in it, it occurred to me that one of the most serious things the matter with our business was that our product was so poor. Of all the cards that I was engraving only a few would be any credit to a sender. They were cheap, inartistic, and lacked in workmanship. Out of my whole line there were only a few that a gentleman or lady would want to send to a friend. Those of my competitors were no better. Then when I asked myself why these cards were so poor, it occurred to me for the first time that we were all degrading our business, copying rather than creating. Furthermore, it suddenly appeared to me that trying to put out an article of taste on a price appeal was absolutely wrong - but that was exactly what we were doing.

"What we needed to do was to make better cards and get better prices. Then I could see instead of fighting with one another for new customers, we all needed to go out and develop new customers and new business.

"The next thing was what to do about it. I did not doubt but my competitors would all agree with me if I could only present it to them in the way that I had thought it out for myself - but up to that time my competitors were my enemies. I could not go to them in a friendly way and talk over a matter of mutual interest. Finally, I resolved to try a desperate experiment. I telephoned to each one of my leading competitors and asked him to come to my office at ten o'clock the following Tuesday morning. I told him that I had a business proposition that I wanted to talk over with him. At no time did I hint that there was to be anyone else present excepting the two of us.

"You can imagine the surprise of these men upon arriving at my office to find that they were not meeting me personally, but that all of the hated competitors were

there together. The atmosphere was very much strained and black looks prevailed. When the last man arrived, I immediately broke into my subject.

"I said, 'See here, noys, the greeting card business with me is mighty poor. It is simply rotten.' Then I proceeded to tell them why I thought it was so bad. I pointed out to them that most of the greeting cards that we were putting out were no credit to us or to the people who bought them to send to their friends. I did not, however, urge that we discontinue stealing designs from one another or propose any other reforms. I simply said to them: 'Now if I know anything that will help you boys to make your cards better you are welcome to it. Before you leave here I want you to go through my plant and investigate everything I am doing. If I am producing any results that you are not familiar with I will tell you everything about it that I know.' Then I proceeded to review the difficulties that some of them had evidently had in copying my best work. I pointed out to Charley Aiken that he had not used the right kind of red in attempting to reproduce my rose du Barry. 'If you are still making those and are interested, I will show you just how I mix my ink, and I believe that you can make your card a whole lot better.'

"The men looked at one another in surprise and bewilderment. They could hardly believe what I was saying to them. They thought that I had gotten them there to lodge complaints and to pass accusations. Instead of that I was throwing my plant open for their inspection and giving them the benefit of everything that I knew. The atmosphere soon thawed out. They very gladly accepted my invitation and we went through the plant. I took extra pains to explain every device that I had available and to open all my secrets of manufacturing. Finally we completed an inspection of the plant at about half past twelve and we all went to lunch together. That was another innovation. It was more than that; it was the first of a series of luncheons and get-together meetings that finally resulted in the organization of our association and in the advertising of greeting cards which has increased our business from eleven million dollars to fifty million dollars a year."

The Incentive in the Lumber Industry

At the ninth annual convention of the National Lumber Manufacturers Association, Mr. W. A. Gilchrist of Memphis, Tennessee gave a talk on "Advertising of Substitutes for Wood." He viewed the inroads of other materials

with alarm, and cited many advertisements as untruths.

The following was taken from the Saturday Evening Post of that period:

"Learn about brick. Everyone admires a brick house. Few realize its low cost and economy. Brick is the most beautiful, most reliable, really the cheapest building material in the world. The cost of wood has risen until a wood house costs more to build and maintain than a brick house. Learn the facts. Send today for our free books.

The Building Brick Association of America
Flatiron Building, New York."

Here is a slate-roofing advertisement of pre-war vintage:

"The resisting qualities of our slate-surfacing material are such that it is especially recommended for, and is being largely used, as a roofing on pulp mills, chemical works, acid and fertilizer plants, and other buildings used for like purposes, where roofs are affected by acid, gases, or fumes. Used in any climate, can be applied in cold weather, and is equally well adapted to uneven, flat, or steep surfaces; can be laid over old shingles - costs less. Sold on its merits and lasting qualities. The first cost, the only cost. Guaranteed for ten years without a coating."

On May 13, 1911, there appeared an article in a building magazine discussing building materials and their choice. Under the heading of "brick" were the following words:

"Wood has long been the cheapest building material in America in respect to first cost, and so it has been the popular opinion that brick was too expensive except for the wealthy. But all the time the supply of lumber has been diminishing, and today the price has advanced until it is not very much cheaper than brick. In fact, the difference is so little that with the many advantages of the more endurable material it seems almost folly not to use it. An ordinary small brick house costs about fifteen per cent more than one of frame construction, yet at least twelve dollars a year is saved which would be required to paint an eight-room frame house, and that is the average interest on two hundred dollars.

"It cannot be denied that brick is the most permanent building material in the world. It has been proved so in all civilized countries through centuries of time. No surface treatment such as painting is ever necessary. The effects of weather upon it are almost inappreciable, as are also those of fire. Brick has been through fire before it is used, and so will resist fire. In fact, the proportion of burnt clay in a building determines to what extent it is absolutely fireproof. This is shown by insurance rates. Here in the vicinity of New York the rate for brick buildings is one-half that for wooden structures."

A great deal of substitute propaganda was prevalent. Employing the highest type of copywriters, and media that penetrated to industrial and ultimate consumers, substitute manufacturers were converting numerous wood users. Table XV shows the expenditures totaling at least twenty million dollars from 1904 to 1910, a seven-year period.

**Table XV Annual Advertising Expenditures for Substitutes
(1904-1910 incl.)**

Cement.....	\$ 600,000
Concrete posts & building blocks.....	125,000
Concrete piles and metal piles.....	25,000
Concrete sidewalks.....	100,000
Steel tanks and concrete.....	25,000
Metal furniture & filing cabinets.....	125,000
Metal lockers.....	25,000
Stone.....	75,000
Brick.....	150,000
Fireproofing houses.....	125,000
Iron Fencing.....	200,000
Metal Store fronts.....	1,000,000

Metal cornices.....	\$ 15,000
Metal window screen frames & weather strips..	20,000
Metal ceilings.....	200,000
Expanded metal and metal lath.....	150,000
"Wall Board" and composition lath substitutes	50,000
Tile, cork, and composition flooring.....	25,000
Metal window frames.....	100,000
Metal shingles.....	50,000
Slate roofing.....	50,000
Tile roofing.....	50,000
Composition roofing.....	150,000
Prepared ready roofing.....	200,000
Tin roofing.....	100,000
Paper boxes.....	5,000
"Metal lumber".....	75,000
Metal rowboats, launches.....	75,000
Metal doors & trim.....	150,000
	<u>\$3,140,000</u>

Mr. Gilchrist felt, as many lumbermen at that time did, that there was little advertising of their product; but what little there was, enveloped the industry only. Pine was advertised in competition with spruce, oak from Indiana was highly touted in competition with Appalachian oak. While the intraindustrial battle was taking place, substitute manufacturers stole their business before the combatants' very eyes.

Mr. Gilchrist ended his speech:

"This association is representative of a production of twenty-five billion feet of lumber. Who would begrudge an expenditure of one cent per thousand on their cut? What a fund it would create, handled in a suitable manner! Lumbermen, stop being fatalists! Help yourselves! and accept this as one of the methods to combat our problems."

Substitute advertising was the most talked of subject at that meeting in Chicago in 1911. A. T. Gerrans of Houma, Louisiana informed his audience that thirty-six railroads invested \$45.33 per mile of track in 1910 to convince the public to travel on their roads. Then he continued:

"Now contrast that with what the lumbermen have done to sell their product to the same identical people that the railroad man tries to reach, and we find that in 1909 there were forty-four billion feet of lumber sawed. No one will dispute me when I say that at the lowest calculation this lumber was worth ten dollars per thousand, average. Then that means four hundred forty million dollars. How much did we lumbermen spend in 1909 to intelligently (as does the railroad man) put our goods before the customer? And how intelligently was it done? We simply carried our advertisements in our trade journals, there to be read by the retail dealer or wholesaler, as the case may be, but not a dollar did we spend in an endeavor to reach the man who builds the house - the real, actual consumer of our product. We all take the current magazines, and who among us does not look over the ads, made so attractive by men skilled in their profession, and what do we find? I will tell of a few:

"The Stewart Iron Works Company says: 'Cheaper than wood, lasts a lifetime. Let us show you economy.'

"The Good Roads Machinery Company, who says: 'With our adjustable molds, concrete culverts properly constructed are undoubtedly most durable, and with these forms can be built at about the cost of lumber culverts.' It seems from this that the one consolation we have hugged in our bosom that we still would be able to furnish lumber for the moulds or forms is becoming a delusion.

"Fish and Company, who advertise tapestry brick, says: 'You can afford a brick house - you cannot afford one of wood.'

"The Safe Cabinet Company says: 'Equally as convenient as best wooden cabinets, and costs only a little, very little, more than wood.'

"Johns-Manville Company says: 'Our asbestos fireproof shingles never rot, decay, warp, or split like wood shingles.'

"Detroit Steel Products Company says: 'Steel windows command a small premium in price over wooden windows, but do not require constant outlay for renewals or repairs, and when considered from a practical standpoint, are never discarded in favor of wooden sash.'

"I could take an hour of your time reading such ads, every one a conveyer of specious arguments to convince our old customers not to use wood and in every case that they succeed they take away another slice of our old trade. 'To quote from a recent issue in a paper: 'Lumbermen, no matter what may be their individual differences, must take energetic measures to defend themselves against the common enemy.'

"We may be mistaken, but we believe that the lumbermen of the entire country are about ready to effectually cooperate in something that gives promise to utilize their combined efforts for the common good. Therefore, gentlemen, if our competitors are intelligently and diligently seeking to convince our old customers that they want something besides lumber, we, in self defense, must seek to educate them, for intelligent advertising is nothing more nor less than education.

"There has been no concerted effort by the producers of substitutes for building materials of any kind to injure lumber, but advertising has been done for several years by cement, fireproofing, metal sash, prepared roofing, metal shingles, and other similar manufacturers, the mass of which has been enough to seriously interfere with the natural growth of the lumber market as a whole. We will not attempt to put them out of business, but we must arrest the trend of events. Why can't we put up a fight for wood that will knock the tar out of prepared roofing and the daylights out of metal sash? Our competitors have rolled us pretty thoroughly, but let me call to your attention to slip no. 1 (slips were put on the chairs of all attending representatives, and described important quotations), where, after all the rot, decay, warping, splitting, and other bad qualities of poor wood, we learn that the crowning defect of all is that it is unsightly!"

Mr. G. E. Watson, secretary of the Southern Cypress Manufacturers Association read a letter from J. H. Donaldson, a retail lumber dealer from New Washington, Ohio. It explained the attitude of the retail lumber dealers:

"...for some time we have been trying to figure out what the trouble is with the shingle market. We realize that we are only furnishing shingles for a very small percent of the roofs in this part of Ohio. Our trade is all with farmers, and we never miss an opportunity to talk shingles for covering either new or old buildings, and we are astonished at the great diversity of reasons given by the farmers themselves why they should use almost anything rather than shingles.

"We were much interested in the discussion on the subject contributed by an Ohio man and published in the American Lumberman recently. It indicates to us that there are others besides ourselves who are beginning to feel that something should be done to relieve the situation; and, you know, we never begin to seek a remedy for any harmful condition until we realize that such a condition exists.

"In riding through a number of states recently, I observed that nearly all of the newer buildings everywhere are covered with other kinds of roofs; therefore, I conclude that lumbermen everywhere must begin to feel the loss of shingle trade soon, and naturally all will begin to seek the remedy, if they are not already seeking it.

"I believe that lumbermen, generally, believe in shingles; that is, they believe that a man can roof his building with a good, serviceable roof covering for a term of years at a small initial cost and upkeep cost with shingles than with anything else, unless the roof should be so flat as to shut out shingles entirely. I think also that the ordinary lumberman believes that we are getting a pretty good class of shingles, except in rare cases, where some mill sends out a poor lot; at any rate, I do not believe anyone will contend that all of the retailers of today are poorer salesmen than they were twenty years ago. Neither will anyone contend that retailers are spending less on advertising now than they did then. So that if you will concede to us that our goods still have the merit; that we are reasonably good merchants; that we are diligent about advertising and getting people informed as to what we have to offer to meet their needs, then you must concede that the trouble lies, partly at least, somewhere else.

"You will say that you are not interested in all of the foregoing because it recites only what is the matter and you will ask, 'Well, what is the matter?' Now, if you will ask one hundred persons that question each will give a different diagnosis and offer a different remedy, and like the blind man and the elephant, each will be partly in the right and yet all in the wrong.

"Personally, I think that the shingle producers and wholesalers, who are the ones having the most at stake in it all, have been outclassed as merchants by almost every Tom, Dick, and Harry who could get up any old kind of a roof covering and get a well-sounding name for it,

and then had the enterprise and the money to advertise it to the roof-using public, thus educating the roof users away from shingles and to everything else.

"If you talk to the farmer about shingles for his new barn he will tell you about somebody's grandfather whose barn had burned, losing all his crop because a spark from the engine caught in the shingles when they were threshing. Another will say that an iron roof is cheaper than shingles, which is not true; but it does not make so much difference in making a sale what the truth is as what the buyer believes the truth is. Another will say that the lightning will follow down his galvanized roof and down his conductor and leave his barn unharmed. Another will say that his insurance costs him less. Another will say, 'Why, nobody uses shingles any more.' Another will point you to some good iron roof that has been in use for twenty years and is still in good shape, and so on. Now, where have the roof users obtained all of this information and misinformation? You know it is the result of general advertising carried on by the roof producers and reaching the roof consumers. And every class of roof, except shingles, is so pushed by the concerns who produce the roof.

"If we will let some composition man put us in a few rolls of roof that will last a few years when laid, we can send him a list of one or more hundreds of names and he will take up a campaign of systematic hammering at them until he gets them to come after some of his roofing.

"I do not know of any of the shingle producers advertising their products in any periodicals of general circulation. And even the advertisements furnished to the lumber trade journals do not furnish the retailer with any arguments to use for shingles as compared with other roofs. What they say in a stereotyped way is that they have shingles that are superior to all others. What we want them to tell is why the shingles are superior to all other roofs and to tell it in such a way that it will be convincing. We also want them to tell it to the millions of people who are going to use some kind of a roof soon.

"Now, I believe that if the big fellows will do their part the retailers will meet them more than half way. If they will wake up and put some of the kind of vim into their advertising that is put in by composition roofing concerns, by patent medicine men, by ready-made clothing houses, and by breakfast food factories, they will find the retailer ready to pay for space in local papers to help sell shingles.

"The shingle business has merit and can be won back again by a mighty united effort, but such things do not just happen, but require brains, enterprise, and money to bring them about."

An appropriate comment on this interesting letter is that nothing substantial had been done until the present depression. Since 1932, the Red Cedar Shingle Bureau has conducted advertising campaigns to increase the consumption of Red Cedar Shingles. The production of shingles has decreased rapidly from 1905 to 1932. In 1905, some 15,300,000,000 shingles were produced; in 1911, when the above letter was written, only twelve billion; in 1915, 8,400,000,000; in 1925, 7,300,000,000; in 1929, 6,100,000,000; in 1932, only 2,100,000,000.

Table XVI Shingle Production

Year	Production in Thousands
1905	15,340,909
1911	12,000,000
1915	8,459,000
1925	7,324,000
1929	6,110,000
1932	2,110,000

Red Gum Advertising

At this same meeting in 1911, Mr. George E. W. Luehrmann of St. Louis, Missouri spoke about his activities in specialty advertising:

"At the request of some of the members I have been asked to relate our experience in advertising red gum. Our company was one of the original five that advertised red gum. During the first four months of the campaign of advertising, we received practically no inquiries or orders that could be traced to that particular advertising. After the fifth month, however, we secured a great number of orders and received a very large number of inquiries so that we were justified in increasing our prices. The market price at the time we started to advertise was about twenty-two dollars at the mill on first and second red gum. When the orders began to materialize, we had no trouble in securing twenty-six dollars and in a very short time thereafter, twenty-eight dollars at the mill. Our campaign started commencing with January, 1908. Since then we have had no surplus of first and second red gum. Our prices have since then been increasing so that today we are receiving thirty-six dollars to forty dollars for first and second red gum and twenty-one dollars for common red gum at the mill.

"The amount of money we spent during the first twelve months was comparatively small. It was not an easy matter at the time we started this advertising to induce the original five to subscribe the required amount. Mr. Gilchrist, now a convert, was the hardest customer to convince that the advertising we were about to begin was in the proper channel to sell our red gum at a respectable price. It really became necessary for us to lock him up in his room and not release him until he signed the contract. He is today one of our most enthusiastic members, and is ready to be the first to sign his subscription for each year."

Mr. Luehrmann went on to speak about how wood competed with steel in railroad car construction. He made these interesting remarks:

"...Within the last six months I have known several friends who have gone east on passenger cars built of steel. They complained bitterly at the end of their ride and stated that they would never travel in another steel car if it could be avoided...

"Personally, I believe the lumbermen have overlooked a crying need to have advertised their goods at an early date. I certainly feel that an organization or club should be formed at once and receive the support of every timber owner and manufacturer in the United States. A committee should at once be appointed and men should be selected who have had experience in this line of work."

The First Appropriation

As a result of this meeting of the subscribers to the National Lumber Manufacturers Association, A. T. Gerrans, J. E. Rhodes, and George E. W. Luehrmann were appointed as the committee on advertising and publicity.

The 1912 annual meeting was held in Cincinnati, Ohio, and the committee on advertising read its report. It recommended that "the National Lumber Manufacturer's Association enter into a practical and efficient advertising campaign." In June, 1911 the committee was increased to five, the original three members included. One each representing the West Coast, Yellow Pine, White Pine and Hemlock, Hardwood and Cypress industries. They were given authority to "establish and maintain an advertising bureau, to secure the ablest and best qualified counselor agent, and to employ the necessary assistants."

The assessment asked from each subscriber was \$.01 per thousand feet produced. This would mean a fund of from \$125,000 to \$150,000 a year. It was decided, however, to undertake the campaign after one hundred thousand dollars had been reached because some of the subscribers might not be able to join on the assessment basis. The Southern Cypress Manufacturer's Association was the first to commit itself; then followed the North Carolina Pine Association; the Georgia-Florida Sawmill Association; the West Coast Lumber Manufacturers Association; the Western Pine Manufacturers Association; the Northern Pine

Manufacturers Association; the Hardwood Manufacturers Association. Finally, the Yellow Pine Manufacturers Association decided to assess members two cents per thousand board feet, half of which would be spent for Yellow Pine advertising.

The Crosby-Chicago advertising agency was retained to do what might be called expert work. So important was this advertising work in the minds of the whole association that the office of the manager was moved from St. Louis to Chicago so that he might be able to handle this activity in conjunction with his others. Incidentally, this agency did the red gum advertising that was mentioned by Mr. Luehrmann.

The competition of substitutes was the primary reason for establishing this hundred-thousand-dollar fund. It is a well known fact that people tend to fight among themselves until a greater danger threatens the entire group. Upon recognizing this, the individuals form a cooperative venture and hope to successfully combat it with their combined efforts. A great deal of impetus was given to the hundred-thousand-dollar quota by the adverse publicity present in newspapers and magazines at that time. 1912 was a peak year for "trust-busting" activities in the lumber business. These accusations made lumbermen realize that if they did nothing to counteract this propaganda, they would lose still more markets.

Cypress Follows Gum

Mr. G. B. Crosby of the Crosby-Chicago advertising agency, the firm which was retained as adviser to the National Lumber Manufacturers Association in 1912, wrote the following to the secretary of the Quoin Club of New York City in 1910:

"Another account which is in part a graduate from the trade field, and is at the same time definitely a creative work, is the Red Gum advertising. This we believe to be a peculiarly potential piece of virgin soil. Recent events already accomplished prove this in part, and other events which we apprehend will occur and will likely go further in demonstrating this belief. So far as we know this is the first office which ever had the temerity to attempt to advertise lumber to the general public through general mediums. The results, upon a very modest basis of expenditure, have been not only decisive, but prompt. The result will be a very much increased appropriation next year for red gum advertising, and undoubtedly the extension of the list to include several other general mediums not upon the present schedule.

"As a matter of passing interest, we may state that the annual cut of red gum is 28,000,000 feet, and that during the past eight months or so we are credited with having added to the producers' price from four to six dollars per thousand feet. We should prefer that the testimony upon this and related points should come from our clients in this case rather than from ourselves.

"The possible importance of this lead was recently well evidenced in the fact that this office received an invitation to attend, last May, the annual convention of the Cypress Growers Association of the various southern states in New Orleans. We accepted the invitation and made a talk upon the subject of enhancing the value of cypress and extending its market. It is an interesting sidelight that some of the cypress growers had a modicum of red gum lumber upon their land and were interested in the fact that they were securing far better prices for their small quantity of red gum than they had a few months before. They were conscious of not having done anything to produce this advance, and were consequently interested in its causes.

"Upon investigating the possible reasons for this advance, they discovered that the red gum people had been doing systematic advertising with a part of the money spent in general mediums. They also discovered who had

been doing it. They thereupon invited representatives of this office to speak to them upon this topic. We did so. Apparently, as a result of that and ensuing consultations, a fund was established by the Cypress Growers Association, and in due course, the account was placed in our hands. It is now about to begin its schedule, in a fairly representative list of general mediums. This list is undoubtedly likely to be much extended next year. We have no reason to apprehend any less favorable results than we secured for the red-gum people. This again was an instance of creative work. We made the cypress account as we made the red-gum account out of absolutely nothing but thin air and faith."

It must be remembered that the five red-gum advertisers were not formed into an association; but voluntarily cooperated to advertise their product. Very much can be said to condemn the practice of demand creation followed by price raising. The red-gum advertising cannot be proven to have been beneficial to the consumer. It might have been informative and educational; yet it cost the consumer money. One of the arguments that advertising helps the consumer by encouraging more people to buy, thereby lowering production costs and ultimate prices, is refuted by the red-gum example. On the other hand, the cost of manufacture usually doesn't enter into the market price of lumber. If people want it, the price goes up. If people won't have it, the price goes down to induce them to buy. There are very few manufactured items that are as sensitive to economic conditions as lumber; and because of constant fluctuations in price, some people might argue that the red-gum manufacturers had every ethical right to get as much for their product as the buyers were willing to give.

Table XVII shows the dates of the first permanent advertising appropriations for four lumber and three substitute associations.

Table XVII Cooperative Appropriations

Name	Date of First Approp'n	First Approp'n Magazines Only	1923 Approp'n	No. of Magazines used in 1923
American Walnut Manufacturers Association	1919	\$ 4,704	\$24,979	11
Maple Flooring Manufacturers Association	1922	11,370	13,080	8
Oak Flooring Manufacturers Association	1919	10,378	55,442	11
Southern Cypress Manufacturers Association	1913	17,224	950	7
Common Brick Manufacturers Association	1920	31,082	10,176	
Portland Cement Association	1916	44,656	91,990	
Associated Tile Manufacturers	1922	5,720	16,914	12

Oak Flooring Cooperative Advertising

One of the first associations to start advertising was the Oak Flooring Manufacturers Association. In 1909, it started its educational work which helped to put oak floors in office and public buildings where its use was unknown. It, together with the Arkansas Soft Pine Bureau, was the only lumber association to continue advertising during the war. The Oak Flooring Manufacturers Association spent \$10,378 in 1919, and \$55,442 in

1923 for magazines alone. It is computed that from 1909 to 1926, the business of its subscribers increased eight hundred per cent. In 1926, the money raised by assessing members on the basis of production amounted to two hundred thousand dollars to be spent for all advertising media. This cooperative campaign has been a starting block for individual advertising. The combination of the two, working in complete unison, has done a great deal toward this eight hundred per cent increase in business during a fifteen-year period.

Black Walnut Cooperative Advertising

Before the great war, ninety per cent of the black walnut lumber manufactured in the United States was exported. Although only ten per cent was used for home consumption, the mills did not feel especially concerned because the European demand absorbed just about as much as they were able to produce. It was a common American observation at that time that black walnut was gradually being cut out and would disappear from the market entirely within a short time.

When the United States entered the war, the walnut export business was cut off overnight. This seeming catastrophe for the manufacturers of this product was averted when it was found that walnut did not easily warp, split, or roughen when exposed to the elements, and therefore was ideal for gun stocks and airplane propel-

lors. Not only did these uses convert the export business into home consumption, but also government representatives were sent out into the field to locate new stands of black walnut timber.

The normal production was increased from fifty million feet annually to one hundred million feet. This abnormal prosperity did not blind the eyes of the manufacturers, for they knew that as soon as the war was over their home market would disappear as quickly as it appeared; and they would be left to try to rebuild an export business, a task requiring many, long years of hard work.

A number of manufacturers called a meeting and decided to start a dealer and manufacturer sponsored campaign to again popularize walnut for furniture and interior trim. When the war ended in 1918, they increased their appropriations, and made direct appeals to the consuming public. Since 1919 and until the market crash in 1929, these manufacturers have been advertising to the general public.

In 1926, eighty per cent of the walnut produced here was consumed in the United States, and only ten per cent was exported. This is a complete reversal of conditions in 1914. This story demonstrates that markets can be changed if the right procedure is used. Admitting that an emergency existed, the manufacturers of black walnut decided to do something about it. They saved a fifteen-million-dollar industry.

Western Red Cedar

The Western Red Cedar Association subscribers produced about ninety per cent of the cedar poles and piling in 1926. They joined in a campaign to advertise the lasting qualities of cedar poles. However, they had a very limited market and rightfully decided that a general consumer campaign would be a waste of money. By using a carefully selected list of magazines, the twelve-thousand-dollar appropriation voted was effective and increased their sales. The association acted as a purchasing directory and put buyers in touch with producers. Without this campaign, this "brokerage" function could not have been pursued so effectively.

Arkansas Soft Pine

The Arkansas Soft Pine Bureau started advertising in 1912 and was the only lumber association besides the Oak Flooring Manufacturers to continue its appropriations through the war. It has taken upon itself many educational phases of the lumber industry; however, its main attempt is to establish Arkansas Soft Pine as a wood with few equals for interior finish in better types of homes. Although Arkansas Soft Pine is in reality a hard pine, this advertising has convinced a good many consumers that Arkansas Soft Pine is at least half way between the two; and a good many more that it is really a sort pine. Because of this smart merchandising, this "special variety" of shortleaf pine has brought a premium price in

most of the markets. Individual members usually advertise in the trade journals only. The association spent about sixty thousand dollars a year for consumer advertising prior to the depression.

California White & Sugar Pine

The California White and Sugar Pine Association, now incorporated in the Western Pine Association, started a campaign to broaden the market for their product in the middle twenties. An unusually high assessment of seven cents per thousand board feet produced eighty thousand dollars to start the campaign. Only about fifteen per cent of the mills joined the association; but they represented eighty per cent of the production.

Mahogany

The mahogany association started advertising in 1923. Its campaign was directed toward educating people in the qualities of mahogany as furniture and interior trim, and convincing them that the price was not too high. The association represented forty per cent of the importers of mahogany in 1926 doing ninety per cent of the business. These subscribers considered the campaign successful since they voted the same appropriation for more than three years.

Wooden Wheels for Automobiles

The story of the wooden wheel is one of not so long ago. All steel automobiles are a product of the de-

pression. The manufacture of automobile wheels is centered in the hands of relatively few manufacturers, and because few automobile factories make their own wheels, they feel that they have nothing to advertise. This is a return to the bottom of a repeated cycle. The manufacturer of wooden wheels for automobiles thought the same until the disk type of wheel began to be prominently advertised, and the resulting competition bit into their market. To offset these inroads, the manufacturers of wooden wheels started a campaign in 1918, which was to be continued for four years; but lasted only until 1921 because of lack of funds.

At that time, it was believed by the members of the association, that the campaign had done its work. At any rate, the losses to other styles of wheels became stationary. In other words, the rate of gain made by solid wheels was cut down. The cooperative advertising appropriation varied from forty thousand dollars to one hundred thousand dollars a year for the three years.

We, who live in this day and age realize that the money spent on this advertising campaign was wasted. The wooden wheel went out of existence as did the wooden sidewalk. However, it is interesting to note that no matter how obsolete a product may become within a relatively short time, it is still possible to elongate this "period of transition" and so enable the manufacturers

to decide on whether they wish to continue the fabrication of the obsolete article or change into the new field. Many manufacturers make this decision too late and are put out of business. Others adapt themselves rather easily and become leading manufacturers of what was once a competitive product.

California Redwood

The California Redwood Association started advertising in 1916, and has done a great deal in the educational field. The ordinary consumer believes that there is only one species of redwood, the big tree, native of the Sierras in California. He has heard over and over again that these trees are a national inheritance and should not be used for individual exploitation. The California Redwood Association has demonstrated that there are two species of Sequoia and that their lumbering was going on in the coastal forests and not in the native habitat of the Big Tree. This educational work was done for both dealers and consumers.

It also did a good sales job overselling the 1924 market. The remarkable resistance of redwood to decay, its freedom from knots, its excellent qualities for construction and general building were advertised with appropriations varying from thirty thousand dollars to seventy-five thousand dollars per year in predepression years. In addition, the association assisted retailers in "Own Your Own Home" campaigns. In 1926, seventy per

cent of the output of redwood was manufactured by subscribers to this association.

Mr. J. H. Browne, president of the Pacific Lumber Company of Illinois, wrote about this campaign thirteen years ago:

"The National Association, of course, has little to do with cooperative marketing. Most of the copy deals with facts about the lumber business, and the publication of these advertisements has been almost entirely in newspapers. Our Redwood advertising is planned and paid for entirely by this company, although it naturally helps other redwood mills, who are in a position to offer their products in this market. Several years ago, the California Redwood Association, to which we belong, initiated a campaign of publicity for redwood in the Middle West and East through the medium of national magazines and trade papers. Some of the association members, however, did not believe in advertising and as a result the work was abandoned after a year. As we are the largest manufacturers of redwood, and as we sell nearly half of the redwood that is distributed in the East, we felt we could afford to carry on a moderate advertising campaign ourselves. This work is now in its fourth year and we are satisfied with the results we have obtained. However, we still believe that educational advertising, similar to ours, should be handled as an association proposition rather than as an individual. While some of our copy is designed to sell redwood, most of it is planned with the idea of broadening the information about the characteristics of our wood and its desirability for various specialty uses."

The Association of Associations

In December, 1918 the National Lumber Manufacturers Association was eleven thousand dollars in excess of liabilities over assets. At that time, the entire publicity performance of this association consisted of a weekly news letter comprised of four pages, doublespaced mimeographed composition. It was turned out by a newspaper writer in his spare time for ten dollars per week.

It is very important to remember that advertising is the paid portion of publicity. In 1921, the association hired a publicity man and started a rather ambitious advertising program calling for an expenditure of two hundred fifty thousand dollars. It was a failure primarily because the one-quarter of a million dollars was never collected. The fact that this money was to be raised by voluntary contributions is self explanatory. Eighty thousand dollars was the sum spent; the majority in newspapers.

In 1924, another attempt was made with the idea of making it permanent at a cost of one hundred thousand dollars per year. The advertisements were mostly institutional in nature and were inserted in a selected list of two hundred newspapers at monthly intervals. The campaign was continued but one season.

In 1927, a campaign was conducted to find a slogan for wood. The prize money consisted of fifteen thousand dollars. Ninety national magazines, class, and farm journals and trade and professional publications were utilized as media. The Trade Extension Committee of the association declared that four hundred thousand people entered the contest; and that the slogan contest "was the first really vigorous national advertising the lumber industry has ever enjoyed. The total cost of the campaign was two hundred thousand dollars. In the

late fall of 1927, the association started to distribute "The Story of Wood," designed to change the public opinion toward the forest industries. Within three years' time about one-half million copies had been disseminated.

In this same year of 1927, the secretary-manager, Dr. Wilson Compton, announced that the subscribers to the National Lumber Manufacturers Association had promised to pay one million dollars for five years for trade extension work. It is interesting to note that the staff of the association undertook to collect these subscription contracts. It cost thirty-six thousand dollars to collect the five million dollars, or .6 of one per cent. The National Retail Lumber Dealers Association contracted with professional fund raisers to establish subscriptions for one of their campaigns. The cost was fifteen per cent of the total sum collected.

To tie in this proposed gigantic expenditure for trade promotion, alliances were concluded with other interested manufacturers like the American Wood Preservers Association, the National Association of Wooden Box Manufacturers, who would simultaneously participate in campaigns to further the consumption of their products.

It was decided to start in February, 1928 using thirty agricultural journals and thirty-six trade and technical publications. In addition, it was voted to allow themselves the extravagance of one round of double-

page advertisements in thirty lumber trade periodicals. During the fall of 1928, a campaign in popular magazines featured the services offered by the Trade Extension Staff of the association. It was addressed to those people engaged in the distribution and utilization of lumber. However, the campaign was also given a wide popular appeal by "the presentation of interesting and dramatic achievements of the lumber industry in many varied fields, such as heavy construction in industries and striking modernization and transformations of both exteriors and interiors of homes." This 1928 advertising year cost two hundred fifty thousand dollars. In other words one-quarter of the trade promotion money went for advertising.

The association considered the campaign successful; and the popular magazine portion especially so. The advertising agency in charge was the J. Walter Thompson Company. Tens of thousands of requests were received from farmers for the booklet, "The Use of Lumber on the Farm," and a great many inquiries regarding the services offered by the technical department made the association rather optimistic.

As a result of the 1928 campaign, and because of the success of the general magazine media, the publicity department decided to spend another quarter of a million dollars mainly in popular and "home interest" magazines

to educate the public in using grade and trade marked lumber. The advertising plans were drawn on the basis of a merchandising survey made by the J. Walter Thompson Company - the first time in lumber history that an independent survey of that kind had been made.

While the radio was in a transitional stage, and no money was charged for addresses, the publicity department of the National Lumber Manufacturers Association prepared addresses and had them broadcast four hundred times through fifty different radio stations.

In 1927, the association in conjunction with a few non-competitive industries produced a rural film entitled, "The Romance of Sleepy Valley," in which was described the rehabilitation of a farm community through material improvements. The picture was shown before two million people and was largely an outgrowth of the cordial relations between the American Farm Bureau Federation and the association.

Another film, "The Transformation," a product of the same collaboration, was a story of building modernization. In 1929, thirty-nine prints of this two-reel picture were on the road for rural showings. Impressed with the success of visual presentation, the publicity department kept twenty-five sets of colored lantern slides in circulation before the depression, telling the story of the lumber industry from the woods to the final product.

The advertising work of the National Lumber Manufacturers Association is secondary in importance to its publicity. Largely through these latter efforts have the vituperations against the industry been stopped.

The advent of the depression in 1929 has largely halted the advertising work of the National Lumber Manufacturers Association and its subscribers. In 1935, three thousand column-inches of newspaper space was purchased in a cooperative campaign between the National Lumber Manufacturers Association and the National Retail Lumber Dealers Association to assist dealers in their direct and indirect advertising.

In June, 1937 one thousand model homes in one thousand communities were advertised in one thousand pages of newspapers. The financing of these advertisements was local.

Mr. C. R. French, director of information in the association, wrote on February 24, 1939:

"The National Lumber Manufacturers Association, itself, is doing no advertising in the traditional sense of the word; and we believe that the only association doing any advertising at present is the Western Pine Association, Portland, Oregon."

The Southern Pine Association

The Southern Pine Association has been engaged in advertising for many years to educate the public about

the properties of Southern Pine. In a report on the trade promotion activities of the association in 1935, Mr. V. A. Stibalt, trade promotion manager, said:

"The most definite accomplishment in connection with advertising media has been the selection of the Robert H. Brooks Company of Little Rock, Arkansas to perform the services usual to an advertising agency. Immediate use has been made of their services, which has resulted in the publication of a most effective pamphlet called, "Fifteen Cardinal Points of Correct Frame Construction." Endorsement is given to these principles through the means of actual photographs obtained by our Mr. Parlour in the hurricane-swept area of Florida, and the effectiveness of this work and the importance of reaching the specifier, distributor, and consumer with the publicity of this type is not subject to debate, when we tell you that the South Florida chapter of the American Institute of Architects, as well as the Red Cross, which has charge of rebuilding this area, as a result of Mr. Parlour's visits have given their unqualified approval to good frame construction in preference to the types of equal or even higher cost.

"Your sub-committee on advertising media has under consideration the first copy for an industry advertising program. The stories to be carried at present are concerted up the introduction of grade-marked lumber to the consumer and publicity for publications and technical data to the trade, in order to promote more effective nation-wide distribution. The practical use of our publications by as many specifiers, distributors, and consumers as possible, will prove the real effectiveness of our program to broaden the market for Southern Pine lumber.

"We have urged subscribers to make use of our envelope stuffers, such as those entitled, "What Part of the Cost of a Wood Framed House is Lumber?" "What's the Difference Between a Freight Car and Your House?" and others. As we develop new literature, it is our plan to develop an envelope stuffer of a corresponding nature to create interest in its distribution.

"Under the head of exhibits, we have built a model incorporating termite proofing features for the State W. P. A. Director of Mississippi for use in an educational campaign, which is accomplished by means of a moving exhibit. That our cooperation is both timely and helpful may best be judged from reading expressions from the state directors.

"We have constructed a model incorporating the fifteen cardinal points of good construction, along with termite proofing features, which has been photographed

and publicized, with due credit to the Southern Pine Association, by the Bureau of Entomology, United States Department of Agriculture. We have completed a model showing the conversion of a basement into an attractive game room, which has aroused such interest that the Brunswick-Balke-Collender Company has built us a miniature billiard table for incorporation with this exhibit, and without cost to the industry. The model of the conversion of attic space into an attractive room has created a great deal of interest, and has been loaned to dealers. The Federal Housing Administration, in Tulsa, Oklahoma featured this model as a central point of an exhibit stressing the advantages of Title I of the Federal Housing Act.

"Our model of a living room is similarly continuing its circuit among retail dealers, and this, together with the other models enumerated, form the nucleus of our exhibits at retail dealer conventions for the coming season.

"In cooperation with the distributing branches of the Ford Motor Company, we have built a model used car lot, which has created great enthusiasm among the Ford distributors and district managers, and should result in the sale of much Southern Pine lumber, in place of competitive materials, which require a much higher investment to produce the same effect."

The entire trade promotional activities of the association cost seven thousand dollars per month for 1936.

At the Texas Centennial Exposition, it was estimated that the model home exhibit of the Southern Pine Association drew some four hundred thousand people, more than visited any other exhibition house, and that there were requests for over two hundred sets of blueprints. The plans of this home may be seen in the pocket on the rear cover.

The Manufacturers of Lumber

Since the trade marking of lumber is only eleven years old, it is to be expected that the greater part

of the lumber sold on the market is without the stamp of the fabricator. This is due in no small degree to the conservatism of the industry. Because of no method of identification, lumber without a trade mark cannot be advertised in general magazines, for what manufacturer is so idealistic that he will advertise to benefit his competitors?

The larger companies advertise in the trade journals quite consistently with full page layouts. The smaller ones cannot even afford to spend the \$175.00 required, and so choose inconspicuous positions of small size. The greater portion of lumber manufacturer advertising occurs in trade journals.

It has been demonstrated that there have been more cooperative campaigns by competitors in the lumber business than in any other industry. It seemed to be the only method of assembling large enough finances to establish an effective advertising program. It was also realized that intraindustrial competition was retarding the expansion of lumber markets, and substitute manufacturers were rapidly taking over the remaining fields. While building operations increased over one hundred per cent from 1910 to 1925, the consumption of lumber declined ten per cent, while the use of brick, cement, and structural steel increased from one hundred to one hundred fifty per cent. Steel commodities, which came

in competition with lumber, increased from less than seventy in 1917 to more than eight hundred in 1925.

It would be ridiculous to blame the loss of markets to the lack of advertising only. There is no doubt that the dearth of appreciation of the place of lumber in the economy of the nation did contribute its share, but we know of many more important factors, like the changes in the mode of living, that stand foremost in our minds.

However, because the lumber industry reacts so violently to economic conditions, it has been next to impossible to find advertising appropriations that remained stationary from year to year. Advertising seems to be the first to take a cut. A company or association might spend eighty thousand dollars one year and nothing the next. Experts tell us that constant advertising, even if it be on a small scale is better than expensive splurges and then nothing at all.

One of the primary necessities in the lumber industry is to promote consumer buying. The lumber manufacturer doesn't appropriate enough money to do much consumer advertising; and, since he doesn't usually sell a trade-marked product, he has two good reasons for trying to prime the middleman's market.

A Solution

If manufacturers are not able to increase consumer interest by advertising, who is? The regional association is interested in furthering the sales of its subscribers. It favors some special species to the detriment of others. Competitive advertising within an industry, such as lumber, is wasteful because it has been so difficult to find even small appropriations in the past. Regional associations have done small amounts of consumer advertising; but always with the necessary "buy my species" phrase attached. They have been instrumental in educating the public to see and understand their viewpoint; however, it is difficult to conceive that each or even one regional association would take upon its shoulders the solution of a problem of prime importance to the entire industry.

If manufacturers can't and regional lumber associations won't advertise wood in competition with substitutes, and home investment in competition with automobiles, the lot rightly falls to the association of associations. It represents fourteen affiliated cooperatives who produce about sixty-five per cent of the total lumber cut in this country. Surely, it is the voice of the American lumberman.

In 1927, in order to convince lumber manufacturers to pledge one million dollars a year for five years to

push forward a trade promotion campaign, Dr. Wilson Compton used the following figures as the annual expenditures of substitute fabricators:

Table XVIII 1927 Advertising Appropriation of Substitute Manufacturers in National Magazines Only

Name	Amount
American Face Brick Association	\$ 200,000
Atlas Portland Cement Company	200,000
Association of Tile Manufacturers	75,000
Barrett Company	75,000
Beaver Products Company	200,000
Carey Asfal slate Roofing	50,000
Celotex Company	475,000
Certainteed Products Company	250,000
Common Brick Manufacturers Association	50,000
Detroit Steel Products Company	75,000
Everlastric Shingle Roofing	100,000
Hollow Building Tile Association	50,000
Indiana Limestone Quarrymen's Association	75,000
Johns-Manville	500,000

Name	Amount
Lehigh Portland Cement Company	\$ 150,000
Portland Cement Association	400,000
Richardson Roofing	175,000
Rubberoid Roofing	40,000
Upson Wallboard	150,000
Vulcanite Roofing	75,000
U. S. Gypsum	250,000
Total	\$3,565,000

He stated that approximately thirty million dollars per year was being spent to promote the use of lumber substitutes. The lumbermen were properly impressed and decided to appropriate.

Of this million dollars, only two hundred fifty thousand dollars was spent on advertising in 1928. In 1929, after the market crash the appropriation dwindled to almost nothing.

President McNary of the national association suggested a one per cent levy on sales at the annual dinner to the president on November 1, 1938. If supported by sixty per cent, he calculated that the yield would be

from two and one-half to four million dollars - to be spent for trade promotion, publicity, and research. Sixty per cent of the yield would go to the national, and forty per cent to the regional associations.

We have seen that the stumbling block over which the National Lumber Manufacturers Association has often fallen since its first campaign in 1912, was financial. Because of this, it is safe to assume that the national association will not receive much over one million dollars if the one per cent levy is sanctioned. This is the same as the 1927 subscription out of which two hundred fifty thousand dollars was used for advertising.

Below are listed the major 1937 Advertisers' Expenditures as they appeared in the 1938-1939 Radio Directory. The newspaper lineage has been copied from the Printer's Ink and multiplied by thirty cents per line as suggested by the American Newspaper Publisher's Association. Therefore, the newspaper expenditures are not one hundred per cent exact measurement.

It is interesting to note that not one advertiser is listed that represents the basic raw material, lumber; or its various fabrications.

In following the trend further, two of the largest corporations in the world spent \$16,928,077 on advertising - General Motors Corporation, \$16,139,005 and United Steel Corporation, \$789,072. The former spent \$11,500,000 in advertising automobiles alone.

MAJOR 1937 ADVERTISERS' EXPENDITURES

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Adam Hat Stores	\$10,476	--	\$ --	\$ 10,476
Addressograph-Multigraph	--	\$140,136	--	150,136
Adlerike Company	--	75,686	96,800	172,486
Admiracion Laboratories	43,082	--	--	43,082
Allegheny Steel	50,216	--	--	50,216
Allis Chalmers Mfg.	--	111,027	--	111,027
All Year Club of So. Calif.	--	164,729	--	164,729
Aluminum Co. of America	--	543,832	68,500	612,332
Aluminum Cooking Utensil	--	--	51,800	51,800
American Airlines	--	26,138	107,800	133,938
American Auto Insurance	--	--	46,200	46,200
American Bakeries	--	--	81,000	81,000
American Bird Products	1,932	--	--	1,932
American Brass	--	102,243	--	102,243
American Can	344,659	33,550	216,200	594,409
American Chain & Cable	--	147,181	--	147,181
American Chicle	6,504	305,164	92,800	404,468
American Cranberry Exch.	--	9,211	82,700	91,911
American Distilling	--	9,305	107,700	117,005
American Express	--	96,714	123,700	220,414
American Gas Association	--	353,325	--	353,325
American Home Products	2,547,814	264,958	137,500	2,950,272
American Oil	3,722	5,020	259,000	267,742
American Radiator	144,104	345,412	228,900	718,416
American Rolling Mill	41,669	95,606	--	137,275
American Safety Razor	--	253,303	139,700	393,003
American Stove	--	153,630	--	153,630
American Sugar Refining	--	--	108,100	108,100
American Tel. & Tel.	--	1,306,256	--	1,306,256
American Tobacco	2,339,849	2,119,934	2,232,500	6,693,283
Anheuser Bush	--	160,257	118,200	278,457
Arden, Elizabeth	75,579	155,097	--	230,676
Armin-varady	40,284	--	--	40,284
Armour & Company	--	621,751	485,000	1,106,751
Armstrong Cork	--	629,815	62,600	692,415
Ass. of American Railroads	--	715,637	--	715,637
Ass. of Pacific Fisheries	--	238,317	--	238,317
Atlantic Coast Line	--	8,242	66,300	74,542
Atlantic, Gulf & West Indies	--	970	149,900	150,870
Atlantic Refining	274,810	5,023	121,200	401,033
Atchison, Topeka & Santa Fe	11,843	59,850	254,800	316,493
Axton Fisher	116,868	--	64,400	181,268
Babbitt, B. T.	385,032	8,347	85,200	478,579
Ballantine's	--	7,500	198,000	205,500
Baltimore & Ohio R.R.	--	1,629	166,200	167,829
Bank of America	70,008	5,040	--	75,048
Barnsdall Refining	69,740	--	--	69,740
Bayuk Cigars	--	--	465,700	465,700
B. C. Remedy Company	--	1,658	112,600	114,258

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Beechnut Packing	--	\$494,780	214,100	\$ 708,880
Bel-ans	--	--	63,200	63,200
Bell Tel. of Penna.	--	--	124,600	124,600
Ben Burke	--	169,375	138,600	307,975
Bendix Aviation	--	142,040	--	142,040
Beneficial Management	190,509	--	--	190,509
Best Foods	7,092	350,825	112,000	469,917
Better Speech Institute	5,868	--	--	5,868
Beverwyck Breweries	--	--	67,000	67,000
Bigelow Sanford	--	368,735	--	368,735
Bissell Carpet	--	107,863	--	107,863
Blatz Brewing	--	--	122,600	122,600
Block Drug	--	9,264	340,700	349,964
Bon Ami	--	477,295	--	477,295
Book of the Month Club	--	123,971	--	123,971
Borden Company	--	110,925	324,600	435,525
Bourjois Sales	--	218,132	46,500	264,632
Boways, Inc.	159,432	--	--	159,432
Bristol-Myers	762,200	2,741,318	473,300	3,976,818
Brown-Forman Distilling	--	35,490	370,300	405,790
Brown-Vintners	--	57,202	451,400	508,602
Brown & Williamson Tob.	353,404	513,462	133,000	999,866
Bryant, Lane	--	101,428	--	101,428
Buckingham Corp.	--	--	69,300	69,300
Budd, E. G. Mfg.	--	243,885	--	243,885
Burdett College	3,960	--	--	3,960
Calif. Canning Peach Ind.	--	199,355	--	199,355
California Chain Store	12,220	--	--	12,220
California Conserving	18,720	--	--	18,720
Calif. Fruit Growers Exch.	--	235,289	--	235,289
California Packing	--	753,109	--	753,109
California Walnut Growers	--	129,050	--	129,050
Calotabs	--	7,979	47,000	54,979
Campana Sales	583,123	178,951	--	762,074
Campbell Cereal	7,544	1,224	--	8,768
Campbell Soup	1,166,128	1,813,543	255,100	3,234,771
Canada Dry Gingerale	--	382,880	381,400	764,280
Canada S.S. Lines	--	9,323	81,800	91,123
Canadian National R.R.	--	48,783	142,600	191,383
Canadian Pacific	--	227,791	256,600	484,391
Cannon Mills	--	393,613	--	393,613
Capudine Chemical	--	--	59,100	59,100
Carborundum Company	114,690	16,951	--	131,641
Cardinet Candy	33,200	--	--	33,200
Carleton & Hovey	--	--	91,600	91,600
Carnation Company	462,168	14,613	--	476,781
Carrier Corporation	--	126,795	--	126,795
Carter's Medicine	--	97,991	195,200	293,191
Caswell, G. W. Coffee	4,608	--	--	4,608

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Caterpillar Tractor	--	\$ 227,566	\$ --	\$ 227,566
Celotex	--	134,853	--	134,853
Century Distilling	--	--	140,800	140,800
Champagne Velvet Products	--	--	65,800	65,800
Champion Spark Plug	--	366,926	100,500	467,426
Chattanooga Medicine	--	2,547	54,900	57,447
Chesapeake & Ohio R. R.	--	106,145	--	106,145
Chesapeake & Ohio Tel.	--	--	76,300	76,300
Chesebrough Mfg.	50,760	156,642	176,100	383,502
Chicago, Burlgtn&Quincy	--	42,439	137,700	180,139
Chicago Engineering Wks.	2,813	--	--	2,813
Chicago Flexible Shaft	--	106,682	59,900	166,582
Chicago, Milwaukee&St.Paul	--	23,792	131,900	155,692
Chicago, Northwestern	--	842	63,300	64,142
Chicago, " & Union Pacific	--	3,746	220,000	223,746
Chicago, Rock Island & Pacific	--	--	76,700	76,700
Chicago Tribune	--	14,413	144,500	158,913
Chrysler Sales	911,051	3,807,365	2,582,100	7,300,516
Church & Dwight	--	110,929	--	110,929
Cities Service	575,603	17,116	66,700	659,419
Clements Company	--	--	162,900	162,900
Climalene Company	--	21,535	198,400	219,935
Clorox Chemical Company	--	123,975	140,400	264,375
Cluett Peabody	--	451,005	--	451,005
Coca Cola	265,170	867,325	592,800	1,725,295
Colgate-Palmolive-Peet	1,880,870	2,009,690	1,335,000	5,225,560
Commentator	24,338	--	--	24,338
Commercial Credit	--	172,662	--	172,662
Congoleum Nairn	--	667,365	--	667,365
Congress Cigar	--	--	154,700	154,700
Consolidated Cigar	--	4,200	225,400	229,600
Consolidated Drug Trade	7,803	--	--	7,803
Continental Baking	620,209	--	390,300	1,010,509
Continental Can	--	460	46,000	46,460
Continental Distilling	--	180,053	477,400	657,453
Continental Oil	--	186,427	413,100	599,527
Cook, Thomas & Son	27,550	70	--	27,620
Coons, Adolph	--	--	72,400	72,400
Corning Glass Works	--	210,068	--	210,068
Corn Products Refining	92,505	701,262	137,700	931,467
Cosmopolitan Pictures	--	--	94,500	94,500
Coty, Inc.	--	295,091	109,300	404,391
Coughlin, Father	27,424	--	--	27,424
Cranberry Cannery	--	70,350	56,500	126,850
Crane Company	--	96,150	126,200	222,350
Crazy Water Hotel	14,018	1,524	--	15,542
Cream of Wheat	--	407,105	115,000	522,105
Creomulsion Company	--	--	209,600	209,600
Cresley Radio	--	241,547	56,300	297,847

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Crowell Publishing	\$ --	\$ 110,560	\$ --	\$ 110,560
Crown Overall	28,797	--	--	28,797
Crusders, Inc.	1,434	--	--	1,434
Cudahy Packing	254,963	588,843	58,200	902,006
Cummer Products	320,988	8,531	--	329,319
Cunard-White Star Line	--	164,641	124,700	289,341
Curtis Publishing	--	49,408	561,100	610,508
Curtis Candy	--	50,227	82,800	133,027
Cutler-Hammer	--	114,530	--	114,530
Cycle Trades of Am.	156,356	22,098	--	178,454
Davis, R. B.	195,690	100,684	96,300	392,674
Dearborn Supply	--	95,378	61,700	157,078
Deere, John & Co.	--	201,084	--	201,084
D.L.&W. Company	17,697	--	45,100	62,797
Democratic State Com.	1,480	--	--	1,480
DeVoe & Reynolds	--	106,735	--	106,735
Dick, A. B.	--	240,655	--	240,655
Drackett Chemical	70,856	230,950	--	301,806
Drake Bakeries	--	--	48,400	48,400
Duart Mfg.	81,814	24,540	--	106,354
Duff Norton	13,344	--	--	13,344
Dunn & McCarthy	--	113,517	--	113,517
DuPont, E. I. de Nemours	367,205	786,605	89,200	1,243,010
Eastman Kodak	--	729,505	489,400	1,218,905
Electric Auto Life	--	116,768	--	116,768
Electric Storage Battery	--	143,885	--	143,885
Elgin National watch	6,370	313,033	49,100	368,503
Emerson Drug	44,408	247,740	270,200	562,348
Eno, J. C.	--	57,280	49,100	106,380
Equitable Life Ins.	--	214,175	--	214,175
Euclid Candy	990	--	--	990
ExLax Mfg.	--	340,371	--	340,371
F & F Laboratories	83,315	--	--	83,315
Fairbanks-Morse	--	132,890	59,700	192,590
Falstaff brewing	30,228	--	100,500	130,728
Fasteeth, Inc.	--	19,884	80,600	100,484
Feigenspan Brewing	--	2,853	72,900	75,853
Fells & Company	184,666	324,660	233,000	742,326
Feminine Products	--	19,479	102,000	121,479
Fendrich, H.	53,943	--	--	53,943
Ferry Morse Seed	3,328	30,333	--	33,661
Firestone Tire & Rubber	537,634	729,038	533,500	1,800,172
Fisk Tire	--	159,581	--	159,581
Fitch, F. W.	257,462	202,910	--	460,372
Florence Stove	--	67,195	56,400	123,595
Florida Citrus Comm.	40,225	169,769	273,000	482,994
Florsheim Shoe	--	201,110	--	201,110
Folger, J. A.	--	--	87,100	87,100

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Ford Motor	\$1,768,285	1,898,463	2,914,300	6,581,048
Ford, J. B.	47,950	--	--	47,950
Foster Milburn	--	65,762	175,300	241,062
Fougera, E.	4,050	18,389	--	22,439
Frankfort Distilleries	--	1,047,840	667,500	1,715,340
French Lick Springs Hotel	--	66,436	57,300	123,736
French Line	--	82,843	90,800	173,643
French, R. T.	--	128,062	--	128,062
Fresh Milk Industry	3,763	--	--	3,763
Furness Bermuda	--	12,442	88,800	101,242
Gallen Kamp Shoe Stores	22,578	--	--	22,578
General Baking	151,856	--	243,500	395,356
General Cigar	--	--	752,600	752,600
General Electric	372,635	2,198,860	1,198,700	3,770,195
General Foods	2,764,944	1,969,340	1,459,500	6,193,784
General Mills	1,541,697	793,432	97,300	2,432,429
General Motors	1,818,291	7,646,814	6,673,900	16,139,005
General Shoes	--	112,800	--	112,800
General Tire & Rubber	--	365,665	--	365,665
Gerber Products	--	113,052	--	113,052
G. H. P. Cigars	--	--	246,400	246,400
Gillette Safety Razor	507,815	714,663	112,300	1,034,778
Gilmore Oil	40,116	--	61,700	101,816
Glenmore Distilleries	--	166,992	314,200	481,192
Glidden Co. (Durkees)	37,295	160,508	--	197,803
Globe Grain & Milling	5,360	2,716	--	8,076
Goodrich, B. F. Tire	--	1,229,304	405,600	1,634,905
Goodyear Tire & Rubber	--	1,393,403	1,212,100	2,605,503
Gordon Baking	137,327	--	--	137,327
Gorton-Pow Fisheries	--	--	61,500	61,500
Gospel Broadcasters	42,022	--	--	42,022
Grace Line	--	273,179	--	273,179
Graham Paige Motors	--	108,726	191,600	300,326
Grant, W. T.	--	162,000	--	162,000
Great A. & P. Tea	275,275	3,611	--	278,886
Great Northern	--	62,948	97,200	160,148
Greater Texas & Pan Am. Expos.	--	11,880	55,400	67,280
Greyhound Management	--	283,401	344,800	628,201
Griffin Mfg.	155,232	11,172	--	166,404
Griswold Mfg.	7,240	--	--	7,240
Group of American Banks	277,784	--	--	277,784
Grove Laboratories	180,987	198,630	265,500	645,117
Gruen Watch	92,040	140,130	--	232,170
Gulden, Charles	--	--	66,300	66,300
Gulf Refining	352,710	267,905	397,700	1,018,315
Haffenreffer & Co.	--	--	69,400	69,400
Hamburg American Line	--	73,634	200,300	273,934
Hamilton Watch	--	141,715	--	141,715

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Hammermill Paper	\$ --	\$ 177,485	\$ --	\$ 177,485
Hancock, J. Insurance	--	138,125	--	138,125
Hanes Knitting	--	19,782	125,200	144,982
Hanley, James, Co.	--	--	84,800	84,800
Hart, Schaffner & Marx	--	103,310	--	103,310
Harvard Brewing	--	--	59,300	59,300
Hawaiian Pineapple	--	182,238	--	182,238
Health Products	42,708	208,944	58,500	310,152
Hearst Publications	--	7,300	255,300	262,600
Hecker H-O	97,396	207,352	284,400	586,148
Heinz, H. J.	730,633	1,558,099	890,000	3,178,732
Heublein, G. F. & Bros.	--	185,998	60,400	246,398
Hill's Brothers	--	--	253,000	253,000
Hires, Charles E.	--	91,345	80,400	171,745
Holland Furnace	4,308	34,495	--	38,803
Homemaker's Council	11,040	--	--	11,040
Hoover Company	--	180,660	--	180,660
Horlick's Malted Milk	519,200	417	--	519,617
Hormel, G. A.	9,205	69,895	--	79,100
Houbigant Sales	--	108,360	46,100	154,460
Household Finance	244,348	14,894	--	259,242
Hudnut, Richard	--	465,023	--	465,023
Hudson Coal	24,192	--	--	24,192
Hudson Motor Car	147,690	693,447	660,600	1,507,737
Humphreys Homeopathic Med.	20,384	--	--	20,384
Hygienic Products	--	244,860	53,500	298,360
I. E. S. Lamps	--	67,015	103,200	170,215
Illinois Bell Telephone	--	--	53,300	53,300
Illinois Central R. R.	11,795	--	92,200	103,995
Imperial Paper	--	120,606	--	120,606
Institutional Insurance	--	--	79,900	79,900
International Cellucotton	108,360	1,004,497	61,400	1,174,257
International Harvester	--	1,045,323	130,600	1,175,923
International Mercantile & Marine	--	116,460	74,700	191,160
International Nickle	--	184,867	--	184,867
International Shoe	7,332	123,232	--	130,564
International Silver	140,945	325,713	--	466,658
International Textbook	--	149,417	--	149,417
Investor's Syndicate	--	118,155	--	118,155
Iodent Chemical	43,520	--	--	43,520
Iron Fireman	--	126,756	67,900	194,656
Ironized Yeast	--	195,814	71,400	267,214
Italian Line	--	118,967	84,800	203,767
Italian Tourist Inform. Office	--	109,389	--	109,389
Jell-sert	7,946	--	--	7,946
Jenney Oil	--	--	76,400	76,400
Jergens-Woodbury	841,457	776,354	118,100	1,735,911
Johns-Manville	--	225,389	--	225,389

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Johnson, S. C. & Son	\$ 455,744	\$ 117,900	\$140,200	\$713,844
Johnson & Johnson	--	858,460	113,000	971,468
Journal of Living Pub.	47,691	--	--	47,691
Kalamazoo Stove	--	216,635	--	216,635
Katro-Lex	3,033	--	--	3,033
Kaufman Bros. & Bondy	--	116,749	83,400	200,149
Kay Jewelry	3,096	8,000	--	11,096
Kellogg Company	577,237	460,685	782,800	1,820,722
Kelly Springfield Tire	--	123,632	--	123,632
Kendall Company	--	244,575	194,600	439,175
Kleinert Rubber	--	119,971	--	119,971
Knox Company	--	48,346	206,600	254,946
Knox Gelatine	68,950	131,361	--	200,311
Knox Hat	--	110,269	--	110,269
Koppers Coke	13,422	--	57,700	71,122
Krank, A. J.	24,240	--	--	24,240
Kroehler Mfg.	--	154,400	--	154,400
Kreuger Brewing	27,792	--	--	27,792
Lady Esther Company	1,000,040	462,574	53,900	1,516,514
Lambert Pharmacal	82,124	2,188,526	85,100	2,355,750
Lamont Corliss	290,664	1,070,952	99,800	1,461,416
Langendorf Bakeries	35,144	--	--	35,144
LaSalle Extension Univ.	--	154,823	--	154,823
Leeming, Thomas	--	69,537	104,800	174,337
Lehn & Fink Products	609,326	818,301	--	1,427,627
Lesoine, Marcus	--	--	56,200	56,200
Lever Brothers	2,182,123	1,634,640	2,564,500	6,381,263
Lewis, Howe	312,548	143,176	--	455,724
Libby, McNeill & Libby	57,139	412,583	174,900	644,622
Libby-Owens-Ford	--	233,090	--	233,090
Liberty Mutual	--	101,296	--	101,296
Liebmann Breweries	--	7,150	54,300	61,450
Life Savers	--	32,300	81,500	113,800
Liggett & Myers Tobacco	1,806,541	260,627	4,446,700	8,853,268
Lipton, Thomas J.	--	56,861	113,900	170,761
Literary Guild of American	--	116,873	--	116,873
Little Crow Milling	5,996	--	--	5,996
Local Cooperative Campaign	15,763	--	--	15,763
Local Department Stores	6,118	--	--	6,118
Local Loan	5,136	--	--	5,136
Look, Inc.	--	--	210,900	210,900
Loose-Wiles Biscuit	144,720	102,042	79,100	325,862
Lorillard, P.	103,490	610,848	3,079,400	3,793,738
Los Angeles Soap	14,526	3,213	51,900	69,639
Louisville & Nashville	--	--	126,700	126,700
Lovely Lady	2,340	28,164	--	30,504
Ludens, Inc.	36,036	43,808	76,800	156,744
Luft, G. W.	--	219,070	--	219,070
Lutheran Church	14,956	--	--	14,956

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Lutheran Laymen	\$ 6,851	\$ --	\$ --	\$ 6,851
McCormick Sales	--	5,166	73,400	78,566
McGraw Electric	--	253,818	--	253,818
McKesson & Robbins	7,034	314,510	412,300	733,844
Macfadden Publications	351,825	11,360	--	363,185
Macmillan	--	41,886	81,400	113,286
Moline Development Comm.	16,686	15,750	--	32,436
Manhattan Soap	114,819	--	--	114,819
Morrow, J. W.	84,542	--	--	84,542
Maryland Pharmacal	--	--	47,600	47,600
Masonite	--	101,124	--	101,124
Matson Navigation	--	185,267	72,500	257,767
Maybelline	29,988	211,487	--	241,475
Maytag	--	82,093	88,200	170,293
Mennen Company	58,510	152,667	--	211,177
Mentholatum Company	--	71,481	130,300	201,781
Metro-Goldwyn-Mayer	--	238,433	--	238,433
Metropolitan Life Ins.	--	1,048,036	74,100	1,122,136
Mid-Continent Petroleum	--	--	71,100	71,100
Miles, Dr., Lab.	1,457,470	254,165	--	1,711,635
Mills, Marjorie	9,386	--	--	9,386
Minnesota valley Canning	--	176,875	--	176,875
M. J. B. Co.	--	--	142,300	142,300
Modern Food	20,580	--	--	20,580
Modern Magazine	9,900	--	--	9,900
Moore, Benjamin	33,044	--	--	33,044
Monroe Calculating	--	117,520	--	117,520
Monticello Drug	--	--	68,700	68,700
Morrell, John	47,304	50,248	--	97,552
Morris, Philip, & Co.	823,727	169,726	--	993,453
Morton Salt	--	146,672	--	146,672
Mountain valley Springs	--	--	46,100	46,100
Mueller, C. F.	102,336	--	--	102,336
Murine	16,138	30,370	--	46,508
Nash-Kelvinator	534,673	1,004,327	884,600	2,423,600
National Biscuit	238,400	631,606	444,100	1,312,136
National Carbon	--	--	95,400	95,400
National Dairy	1,275,202	843,837	544,400	2,663,439
National Distillers	--	601,816	2,345,600	2,947,416
National Ice Adv.	248,686	141,685	--	390,371
National Lead	--	325,833	--	325,833
National Silver	1,200	6,688	--	7,888
National Sugar Refining	--	--	140,900	140,900
National Gas	--	--	120,900	120,900
Nehi, Inc.	--	10,375	53,300	63,695
New England Tel. & Tel.	--	--	104,800	104,800
N. Y. Bureau Milk Pub.	--	--	54,800	54,800
New York Central R.R.	--	87,485	149,700	237,185
New York Herald Tribune	--	23,800	48,600	72,400

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
New York Life Ins.	\$ --	\$186,279	\$ --	\$186,279
N.Y., N.H., & Hartford R.R.	--	26,655	76,400	103,055
New York Sun	--	40,455	84,400	124,855
New York Telephone	--	--	292,300	292,300
New York Times	--	1,650	97,300	98,950
Niagara Hudson Power	--	375	173,600	173,975
Noblitt-Sparks	--	169,510	--	169,510
Norge Corporation	--	554,287	740,900	1,295,187
North American Accident Ins.	9,487	12,770	--	22,257
Northern Pacific	--	38,206	74,500	112,706
Northern Paper Mills	--	--	46,800	46,800
Northwestern Bell Tel.	--	--	69,500	69,500
Northwestern Mutual Life	--	123,770	--	123,770
Northwestern Yeast	--	198,358	--	198,358
Norwich Pharmacal	--	247,787	84,900	332,687
Noxzema Chemical	17,610	1,939	145,000	164,549
Nurito Company	--	12,464	46,300	58,764
Occidental Life Ins.	19,200	--	--	19,200
Ohio Bell Tel.	--	--	117,200	117,200
Oldtyme Distilleries	--	41,575	138,300	179,875
Oliver Farm Equipment	--	115,066	--	115,066
Olson Rug	11,317	221,138	--	232,455
Oneida, Ltd.	--	305,605	--	305,605
Oregon State Highway	1,110	39,280	--	40,390
Owens-Illinois Glass	24,351	49,962	--	74,313
Oxo, Ltd.	2,744	--	--	2,744
Pacific Coast Borax	278,236	102,835	--	381,071
Pacific Gas & Electric	--	5,018	106,100	111,119
Pacific Guano	1,872	740	--	2,612
Pacific Tel & Tel	--	--	105,100	105,100
Packard Motor Car	757,820	716,526	490,500	1,964,846
Packer's Tar Soap	148,902	--	--	148,902
Paramount Publix	--	212,530	--	212,530
Park & Tilford	--	280,335	440,800	721,135
Parkay Oleomargarine	--	--	65,700	65,700
Parke Davis	--	172,634	--	172,634
Parker Pen	--	393,564	111,000	504,564
Parker Watch	4,692	--	--	4,692
Penick & Ford	--	129,412	--	129,412
Penn. Anthracite Coal	--	--	119,000	119,000
Penn. Grade Crude Oil	--	133,220	--	133,220
Penn. Publicity Comm.	3,775	--	--	3,775
Pennsylvania R. R.	--	2,234	196,400	198,634
Pennzoil Company	--	421,769	--	421,769
Pepper, Dr., Beverages	--	11,200	73,100	84,300
Pepperell Mfg.	36,720	112,905	--	149,625
Pepsi-Cola	--	--	329,800	329,800
Pepsodent Company	1,269,158	458,209	577,800	2,305,167
Requet Mills	--	126,600	--	126,600

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Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Perfect Circle	\$ --	\$196,433	\$ --	\$196,433
Perfection Stove	--	257,751	45,600	303,351
Perfolastic Company	--	120,412	--	120,412
Personal Products	--	221,000	--	221,000
Pet Milk Sales	537,094	--	--	537,094
Philadelphia Bulletin	--	12,350	75,200	87,550
Philadelphia Inquirer	--	4,350	74,800	79,150
Philco Radio & Telev.	790,805	631,767	636,800	2,059,372
Phillips Packing	85,500	62,355	--	147,855
Phillips Petroleum	136,700	--	222,000	358,700
Pictorial Review-DeL.	--	63	172,600	172,663
Pillsbury Flour Mills	504,521	353,186	117,100	974,807
Pineapple Producers	--	255,625	--	255,625
Pinex Company	--	25,008	141,600	166,608
Pinkham, Lydia	4,461	198,943	117,900	321,304
Pittsburgh Plate Glas	--	375,187	--	375,187
Plate Glass Mfr. of America	--	116,950	--	116,950
Plough, Inc.	--	11,375	358,500	369,875
Polk Miller Products	--	105,019	--	105,019
Portland Cement	--	154,666	105,400	260,066
Potter Drug & Chemical	--	41,106	283,300	324,406
Premier Pabst	--	247,929	311,400	559,329
Prescott, J. L.	--	--	62,100	62,100
Princess Pat	133,674	34,840	--	168,514
Proctor & Gamble	4,496,067	2,376,866	2,267,900	9,140,833
Progress Corporation	--	165,431	--	165,431
Pro-Ker Labs	3,354	--	--	3,354
Prudential Life Ins.	--	120,154	104,600	224,754
Public Service of N. J.	--	--	93,000	93,000
Pullman	--	499,957	--	499,957
Pure Milk Cheese	13,408	--	--	13,408
Parity Bakeries	--	--	87,900	87,900
Quaker Oats	222,426	532,186	781,500	1,536,112
Quaker State Oil	--	236,689	--	236,689
Rubin	12,028	--	--	12,028
R C A Mfg.	1,153,585	515,881	445,100	2,114,566
Radio Guide	4,272	--	--	4,272
Railway Express	--	57,750	99,400	157,150
Rainier Brewing	--	--	62,800	62,800
Raladam	--	--	128,000	128,000
Ralston-Purina	367,484	196,177	228,000	791,661
Reynolds, Inc.	14,300	--	--	14,300
Real Silk Hosiery	64,688	217,586	--	282,274
Red Top Malt	--	--	59,600	59,600
Regensburg, E. & Son	--	700	50,400	51,100
Regional Advertisers	107,248	--	--	107,248
Remington Rand	--	152,442	--	152,442
Republic Steel	--	103,082	--	103,082
Resinol Chemical	--	96,487	113,000	209,487

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40. The fortieth part of the document is a list of names and their corresponding addresses.

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Reynolds, R. J. Tobacco	790,315	\$3,407,457	4626,900	8824,672
Richfield Oil of Calif.	214,124	--	291,400	505,524
Rio Grande Oil	17,610	--	--	17,610
Rocke News Syndicate	2,574	--	--	2,574
Roma Wine Company	1,485	--	--	1,485
Royal Typewriter	--	228,889	76,200	305,089
Ruppert, Jacob	--	7,500	85,900	93,400
Salada Tea	--	--	267,800	267,800
Sales Affiliates	--	4,780	54,800	59,580
Sante re R. R.	--	136,537	--	136,537
Saratoga Association	600	--	--	600
Schaefer Brewing	--	14,800	52,300	67,100
Schenley Products	--	824,400	2359,300	3183,700
Schering Corp.	--	172,730	--	172,730
Schick Razor	--	395,209	98,400	493,609
Schieffelin	--	311,329	149,700	461,029
Schilling, A.	--	2,466	89,400	91,866
Schlitz Brewing	--	161,239	207,400	368,639
Scholl Mfg.	--	157,896	147,600	305,496
Scoff & Bowne	--	--	78,800	78,800
Scott Paper	13,312	578,857	84,400	676,569
Scull, William S.	--	3,415	84,200	87,615
Seaboard Airline	--	1,438	57,800	59,238
Seagrams, Ltd.	--	801,268	2364,500	3165,768
Sealed Power	--	133,280	--	133,280
Sears Roebuck	--	105,465	--	105,465
Seedol Labs	--	75,384	74,500	149,884
Seiberling Rubber	--	102,193	--	102,193
Servel Sales (Electrolus)	117,265	552,821	292,000	962,086
Seven Up Bottling	--	--	72,100	72,100
Schaeffer Pen	12,360	257,600	83,400	353,360
Shell Oil	283,110	701,587	678,200	1,662,897
Sherwin Williams	321,295	254,653	63,600	639,548
Signal Oil	49,512	--	--	49,512
Simmons Company	--	286,515	--	286,515
Simmons Mfg.	--	252,729	--	252,729
Simon & Shuster	--	84,765	56,000	140,765
Sinclair Refining	149,072	162,600	67,700	379,372
Singer Sewing Machine	--	183,445	--	183,445
Siroil	--	12,223	67,800	80,023
Skelly Oil	29,220	--	64,100	93,320
Skol Products	8,167	4,009	--	12,176
Sloan, W. & J.	--	305,828	--	305,828
Smart, D. A.	71,570	--	75,700	147,270
Smith Brothers	55,848	73,727	124,700	254,275
Smith, L. C.	--	182,166	73,800	255,966
Socony Vacuum Oil	--	1,378,131	761,300	2,139,431
Somerset Importers	--	129,956	577,700	707,656
S O S Company	--	217,989	--	217,989

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
Southern Bell Tel.&Tel.	\$--	\$ --	\$ 58,600	\$ 58,600
Southern Dairies	--	--	88,600	88,600
Southern Pacific	--	122,117	365,200	487,317
Southwestern Bell	--	--	160,700	160,700
Spencer Corset	--	115,250	--	115,250
Squibb, E. R.	--	849,454	100,700	950,154
S S S Company	25,592	52,235	296,400	374,227
Standard Brands	2,508,139	1,759,119	1,542,000	5,809,258
Standard Oil of Cal.	84,508	25,960	405,000	515,468
Standard Oil of Ind.	--	127,139	599,900	727,039
Standard Oil of Louisiana	--	--	46,200	46,200
Standard Oil of N. J.	--	371,251	364,600	735,851
Standard Oil of Ohio	--	3,217	422,600	425,817
Stein, A.	--	157,455	--	157,455
Stephano Brothers	--	--	164,800	164,800
Sterling Products	2,331,014	1,076,552	1,312,600	4,720,166
Stern Newspapers	--	1,400	73,000	74,400
St. Louis & San Francisco N. R.	--	--	63,900	63,900
Stewart Warner	389,762	124,602	59,000	573,364
Stokely Brothers	---	258,039	--	258,039
Stromberg Carlson	--	91,172	46,100	137,272
Studebaker Sales	130,692	829,605	910,900	1,871,197
Sun Oil	567,409	9,099	659,600	1,236,108
Sussman Wormser	38,528	--	--	38,528
Swift & Company	128,255	635,334	349,600	1,113,189
Sylmar Packing	5,681	--	--	5,681
Table Products	4,290	--	--	4,290
Talon Fastener	--	355,098	--	355,098
Tastyeast	89,488	--	--	89,488
Taylor, W. A.	--	80,152	70,300	150,452
Tea Market Expansion	--	53,910	434,000	487,910
Tennessee Elec. Power	--	--	82,800	82,800
Texas Company	558,045	977,971	100,400	1,637,416
Texas & Pacific	--	--	51,300	51,300
Tidewater Associated Oils	50,390	182,425	473,100	705,915
Tillemook	10,924	2,148	--	13,072
Time, Inc.	226,563	59,750	--	285,313
Travelers Insurance	--	153,689	--	153,689
T W A	--	51,081	85,500	136,581
Twentieth Century Fox	--	100,611	--	100,611
Underwood-Elliott-Fisher	--	116,696	--	116,696
Union Carbide	--	476,771	--	476,771
Union Oil	53,436	14,610	149,500	217,546
Union Pacific	--	171,327	241,000	412,327
United Airlines	--	94,149	90,300	184,449
United Artists	--	104,957	--	104,957
United Drug	24,403	--	--	24,403
United Fruit	--	48,413	114,400	162,813
U. S. Rubber	--	603,119	242,000	845,119

Advertiser	Network Radio	Maga- zines & Farm Papers	News- papers	Total
U. S. Shoe	\$ --	\$ 111,610	\$ --	\$ 111,610
U. S. Steel	--	789,072	--	789,072
U. S. Tobacco	388,905	--	--	388,905
U. S. Treasury	--	388,340	--	388,340
Van Camp Sea Food	--	41,625	102,300	143,925
Van Patten Pharmacal	--	3,769	50,500	54,269
Van Tage Medicine	--	--	282,200	282,200
Vick Chemical	323,320	442,436	577,400	1,343,156
Vocational Service	3,072	--	--	3,072
Wabash R. R.	--	--	60,900	60,900
Wahl Company	--	120,450	--	120,450
Waite & Bond	--	2,855	56,100	58,955
Walker, Hiram & Son	--	589,425	703,100	1,292,525
Wander Company	355,241	383,496	291,400	1,030,137
Ward Baking	52,303	--	--	52,303
Warner Brothers	--	113,661	---	113,661
Warner, William K.	136,134	7,172	--	143,306
Warren, Northam	--	756,592	--	756,592
Wassey Products	325,662	642,617	257,500	1,225,779
Washington State Apples	--	17,300	48,200	65,500
Washington, G. Coffee	112,096	900	--	112,996
WeCo Products	--	202,377	--	202,377
Welch Grape Juice	191,788	37,582	147,000	376,370
Wellington Sears	--	136,000	--	136,000
Wesson Oil & Snowdrift	42,072	152,900	174,800	369,772
Western Bakeries	29,857	--	--	29,857
Western Cartridge	--	172,920	--	172,920
Western Clock	--	165,650	--	165,650
Westinghouse Electric	--	940,396	450,700	1,391,096
Wheatena Corporation	89,625	63,020	54,700	207,345
Wheeling Steel	--	208,320	--	208,320
Whitcomb, Raymond	--	57,378	53,000	110,378
White Rock Mineral	--	136,345	--	136,345
Whitman, S.F. & Sons	--	183,451	--	183,451
Wildroot Company	--	83,123	51,900	135,023
Willard Storage Battery	--	252,350	--	252,350
Williams, J. B.	--	214,907	112,800	327,707
Williamson Candy	--	9,368	57,100	66,468
Willys Overland	21,645	53,505	267,400	342,550
Wilson & Company	--	25,850	159,500	185,350
wohl Shoe	--	107,328	--	107,328
Worcester Salt	--	4,870	49,300	54,170
World's Dispensary Medicine	--	4,832	95,600	100,432
William Wrigley, Jr.	1,241,052	234,943	50,500	1,526,497
Yardley & Company	--	220,058	51,000	271,058
Young W. F.	--	409,370	--	409,370
Zenith Radio	152,192	186,815	245,400	584,407

It has been established as a confirmed fact that building materials are notoriously underadvertised. Table XX demonstrates the ratio of automobiles to all types of advertising, and structural advertising.

Table XX Ratio of Automobile Advertising to All Advertising and Structural Advertising

Year	Ratio of Automobile Advertising to All	Ratio of Automobile Advertising to Structural
1928	1-13	1-23
1929	1-12	1-23
1930	1-14	1-25
1931	1-14	1-31
1932	1-15	1-53
1933	1-17	1-82
1934	1-16	1-60

That this constant advertising by automobile manufacturers has had its effect is an everyday reality. How many times does one see the latest model car parked in the yard of a tar paper shack? Many people prefer to be the owners of a fast, sporty car and live in squalid circumstances.

People want automobiles, and they will continue to want them until somebody shows them that something else

is better. Advertising has played a gigantic role in building up the demand for automobiles to such a far-fetched extent that men are willing to lower their standards of living to become the possessor of one.

In 1934, a survey was made of Michigan consumers, in which this question was asked: "What major purchases do you intend to make during the next six months?"

"None," was the answer of 56.8 per cent. Of the remaining 43.2 per cent, the following table shows that automobiles were the articles in mind. Remodeling the home was next to the last item wanted.

Table XXI Michigan Future Purchase Survey Results, 1934

Article	Per Cent Who Would Buy
Auto	46.7
Furniture and Rugs	26.0
Clothing	15.7
Electric Refrigerator	10.0
Remodeling	6.8
Radio	3.4

Automobiles are directly competitive with the building materials industry; and as long as their manufacturers continue to stimulate the joy of ownership,

while building material fabricators do not seek to mold the desires of men, no manufacturer of the latter has cause to complain about bad business.

Conclusions

1. Substitute building materials are more extensively advertised than lumber. The 1938 list of leading advertisers shows that \$2,815,525 were spent by building material manufacturers in general magazines. The three important lumber appropriations were:

- (1) Western Pine Association \$50,000
- (2) Weyerhaeuser Sales Company 20,000
- (3) Red Cedar Shingle Bureau 25,000

One hundred thirty thousand two hundred four dollars was the radio advertising bill for building materials in 1938. No lumber company or association spent money for this medium.

For newspapers, the data are not available, but the Southern Pine Association spent twenty thousand dollars in 1937. In 1938, it did very little with this medium. The Southern Pine Association was the only lumber interest to use newspaper space in any quantity in 1937.

Figures collected by the Association of National Advertisers show that lumber product enterprises spend only one-fourth^{of 1 percent} of their gross sales for advertising, while building material manufacturers averaged 2.03 per cent for the five years 1934-1938 inclusive.

2. Building materials are underadvertised in comparison with automobiles, both being competitors for the consumer's dollar. In periods of depression, the ratio of automobile to building material advertising rises sharply. In 1929, it was twenty-three to one; in 1933, eighty-two to one. This can be explained, partially, by the fact that the construction industry is subject to sharp, violent fluctuations, and is loath to spend money on advertising in adverse periods, when individuals do not know how long they will be able to function.

3. In the past, no industry has engaged so extensively in cooperative advertising as has the lumber industry.

4. The largest part of the lumber sold on the market is advertised in trade journals. Manufacturers stay away from consumer advertising because it is expensive and requires a trade-marked product. Weyerhaeuser introduced the first trade-marked lumber in 1928. Naturally, a conservative industry requires a long time to adapt itself to new methods of merchandising.

5. Direct mail is an important media for lumber advertising and is being used by regional associations to reach the ultimate consumer via the subscribers.

6. Steady advertising is seldom undertaken in the lumber industry where appropriations fluctuate with the price of lumber.

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7. Wood should be advertised by the national association; species by the regional associations; and brands by the individual manufacturers.

8. Conservation advertising is a means of informing the public as to what the lumber industry thinks about an important American problem. While not extensive now, it should be more widely used to combat adverse propaganda.

9. The greatest need for advertising lumber lies interindustrially, not intraindustrially. Competitive waste such as exists in the tobacco, food, and automotive fields is undesirable.

10. Advertising, itself, cannot cure the ills of the lumber industry's merchandising program. It works best when included in a smooth cooperative formula of salesmen, retailers, wholesalers, consumers, and others in the channels of distribution.

11. The history of advertising includes many manufacturers who fell by the wayside because of extravagant advertising programs. Many "burn more coal," "eat more bread," and "drink more milk" campaigns have failed, but are revived by some hopeful individual within a few years. The lumber industry has hardly ever been injudicious in appropriations. One quarter of a million dollars was the greatest amount ever spent for advertising by the National Association; and this was for not more than two years in succession.

In spite of this, all precautions should be used to spend every penny in the right medium, at the right time, for the right product, with the right copy.

12. The National Association is now doing no advertising "in the traditional sense of the word." No doubt, this is due to financial difficulties. Money, its presence or absence, governs the extent of an advertising program. Once more, it is evident that subscribers will have to be scared into digging into their pockets, as they were in 1912 and 1927, by presenting a formidable list of substitute expenditures.

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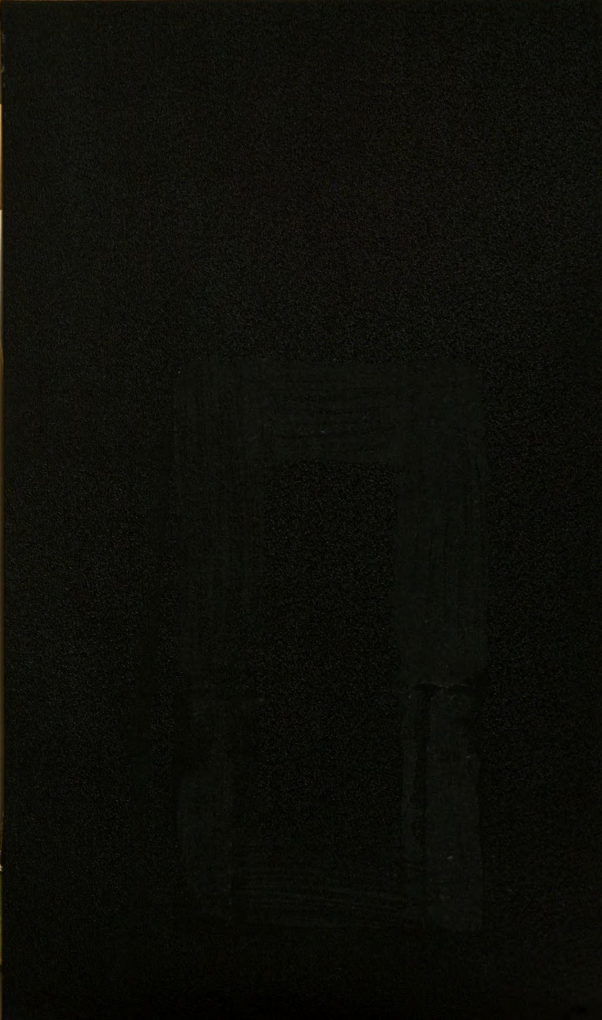
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