



2010 GAY PRESS REPORT

Prime Access, a New York City-based multicultural advertising agency, and Rivendell Media Company, Inc., a Mountainside, NJ, media placement firm, present the 17th annual edition of the *Gay Press Report*.

Prime Access is the leading advertising agency serving the GLBT market. In this capacity, it represents more Fortune 500 companies than any other agency.

Rivendell Media is the preeminent ad-placement agency for gay print media in the United States, covering 99% of all gay and lesbian publications.

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INTRODUCTION

The time frame covered by the *2010 Gay Press Report* – May 2009 through April 2010 – spans the worst of the economic downturn. While the recession had a tremendous impact on the gay and lesbian press, it didn't stop the GLBT community from moving forward.

In September 2009, the *Advocate* magazine, historically a bi-weekly publication, shed many of its staff, and announced that the venerable magazine would be reduced to an insert in a related publication, the monthly magazine, *Out*. Newspapers were also affected. In November, owner Windows Media announced that the *Washington Blade*, America's oldest gay newspaper (which had just celebrated its 40th birthday) would cease publication.¹ They also shut down two other GLBT papers, and a number of long-time gay and lesbian bookstores announced their closings.

Meanwhile, June 2009 marked the 40th anniversary of the Stonewall Riots.

As a measure of how much has changed since then, a Gallup poll conducted in May 2009 reported that 49% of the public now find gay/lesbian relations morally acceptable (it's close, however: 47% consider such relationships morally wrong). And by February 2010, a *Washington Post* poll reported that 47% of the public approves of legalizing same-sex marriage (31% strongly approve, among them a majority of young people under 30). So the economy may have been suffering, but public opinion regarding GLBT issues was definitely on the upswing.

Shortly before our last report (April 2009), the Iowa Supreme Court issued a decision supporting marriage equality, and its legislature concurred. Several weeks later, legislatures in both Vermont and Maine passed laws granting the same. (The Vermont vote overrode its governor's veto, and same-sex marriage began in August.)

In May, the legality of Proposition 8 in California (a ballot initiative passed by voters the previous November, declaring that only marriages between a man and a woman are legal) was upheld by the courts. The year would see continuing attempts to challenge this ruling.

In June, however, the New Hampshire legislature passed revisions to a bill allowing same-sex marriage, which its governor promptly signed. Thus New Hampshire became the sixth state to permit gay couples to wed, following Massachusetts in 2004, Connecticut in 2008, and Iowa, Vermont and Maine in 2009.

In the case of Maine, on the other hand, a ballot referendum banning same-sex marriage was passed by voters in November 2009, reducing the number of states with marriage equality to five, and increasing to 31 the total number of states in which voters had successfully blocked marriage equality. And in December, the New York State Senate voted to defeat a proposal to allow same-sex marriage by a margin of 38 to 24.

¹ The *Washington Blade*'s staff, however, immediately continued the newspaper's publication with a new title, the *DC Agenda*. Eventually they were able to obtain the rights to the original title, and the newspaper is once again being published as the *Washington Blade*.

Meanwhile, same-sex marriage was legalized in Washington, DC, in December 2009 (to begin March 2010), and finished out our reporting year as the sixth location in which same-sex marriage was legal.

At the same time, civil unions became the law in New Jersey, the state of Washington passed legislation expanding domestic partnerships for same-sex couples (an “everything but marriage” law), and New York, Maryland and Washington, DC, began to recognize same-sex marriages legally accomplished elsewhere.

Interest in repealing the US policy of not allowing homosexuals to serve in the armed forces, commonly known as Don’t Ask, Don’t Tell (DADT), began to heat up when Rachel Maddow aired a number of programs on the subject and urged President Obama to repeal that law. The *New York Times* and the *Washington Post* joined the fray, urging Congress to overturn the policy. In July 2009, Chairman of the Joint Chiefs Admiral Michael Mullen stated that he, too, wanted to see a change in DADT, and Representative Patrick Murphy (D-PA), a veteran of the war in Iraq, declared that he would be the lead sponsor in the House of a bill to repeal DADT. Meanwhile, President Obama in his State of the Union address in January 2010 renewed his promise to repeal DADT. (According to an ABC News/*Washington Post* poll, 75% of Americans supported gays serving openly in the military.) The repeal of DADT was finally accomplished in December 2010, beyond the scope of this report, but has yet to be put into practice.

Publicity put a human face on a number of GLBT stories that subsequently led to other legal changes. In May 2009, a *New York Times* article was printed about a lesbian couple who had gone on vacation to Florida, where one of them had fallen ill and was dying in a Miami hospital. The hospital, citing the law, refused to allow her partner the right to visit. Months later (April 2010), President Obama directed the Department of Health and Human Services to issue new regulations requiring hospitals to respect patients’ choices about visitors and medical decisions made on their behalf by their partners.

The latter part of 2009 saw other advances. In September, a bill was introduced in the House to repeal the federal Defense of Marriage Act (DOMA), which restricts marriage to a legal union between a man and a woman. (Later on – outside the range of this report – President Obama would say he does not support DOMA on constitutional grounds, and was therefore ordering the Justice Department not to enforce that law.)

Also in September, the House passed the Employment Non-Discrimination Act (ENDA), the first time either chamber has “voted in favor of employment protections based on sexual orientation.” However the Senate failed to pass ENDA.

And in October, President Obama signed the Matthew Shepard and James Byrd, Jr., Hate Crimes Prevention Act, which, among other things, “gives the federal government the power to prosecute crimes motivated by prejudice” against gays and lesbians. Also in October, Congress lifted the 20-year-old HIV travel ban.

BACKGROUND AND METHODOLOGY

Background

For the past 17 years, the *Gay Press Report* has documented the frequency and content of advertising in the gay and lesbian press, the only entity to have done so.

Each year Prime Access and Rivendell Media collect all gay and lesbian publications in the United States, measure the number and scope of the advertising therein, analyze its content, and publish this report. Changes are tracked over time, and comparisons made across industries.

Thus the *Gay Press Report* functions as a depository of both current and historical data, and is therefore a valuable resource for advertisers, publishers and others who are interested in and want to better understand and more effectively connect with the gay and lesbian market.

While it is difficult to determine the extent of the GLBT market, research has found that between 6% and 7% of the adult population (approximately 16 million people) view themselves as gay, lesbian, bisexual or transgender. Whatever the size of this population, there is no question that gays and lesbians skew affluent and influential people. In 2010, the buying power of this segment was estimated at \$743 billion, and is expected to grow by another \$100 billion in 2011. GLBT consumers are vital contributors to the US economy, but are often overlooked when it comes to advertising.

Like all consumers, gays and lesbians gravitate toward products and brands that advertise directly to them. In addition, studies continue to show that they tend to seek out companies and products that reflect their concerns, and exhibit stronger brand loyalty toward such entities than their straight counterparts. As a result, smart advertisers choose to make this group a marketing priority.

Methodology

The gay and lesbian press includes all publications aimed at the GLBT market – local newspapers, magazines and arts and entertainment (A&E) guides, as well as national magazines.

As might be expected, the scope of the gay and lesbian press changes from year to year. While some publications endure long-term, old ones disappear and new ones begin. Each year, however, we make every attempt to gather the totality of what has been published in this realm during the month of April.

We choose April as the basis for the *Gay Press Report* because the industry regards what happens during April as being typical of what happens in advertising during most other months of the year. Thus we use figures from April as a reflection of what has transpired in the 12 months since our previous report (May 2009 through April 2010).

Most gay and lesbian titles publish on Fridays. As the number of Fridays in April varies from year to year (four to five), we use a timeframe of five Fridays (four calendar weeks plus one day) to represent each April, beginning with the first Friday in April. So for the 2010 report, we began gathering publications dated the first Friday (April 2 in 2010), and stopped collecting them four weeks and one day later, on the fifth Friday (April 30). Using this 29-day time period assures methodological consistency from one year to the next, and allows us to make accurate comparisons.

For the *2010 Gay Press Report*, we assembled and examined a total of 209 publications (totaling 109 individual titles), the entirety of the gay and lesbian press published in April 2010.

To construct the data, we analyze all ads in each publication, classifying them by type of advertiser (product or industry), and noting whether the content is gay-specific or not (that is, contains direct references to gay and lesbian identity and lifestyles in image and/or message).

We also measure the size of each ad and calculate the revenue it represents. Using this methodology, we arrive at an estimate of advertising spending in the gay and lesbian press for the year.

Caveat

This methodology has worked well for us. While preparing the 2010 report, however, we became aware of a shortfall inherent in using the data from one month to represent an entire year. While this methodology provided us with an advantage in 2009, it presented us with a disadvantage in 2010.

The reason for this is the financial crisis – its timing, as well as the fact that it hit the publishing industry (including the GLBT press) particularly hard.

In fact, 2009 was the most difficult year in recent history for both advertising and publishing. While major problems with the economy began to surface in September 2008, our numbers for 2008 had been based on April 2008 which indicated a 31.2% gain over the previous year. Meanwhile, the 2008 figure for Consumer Magazines (representing all advertising revenues from 2008) showed a loss of 9.7%, hinting at the downturn to come. (See page 1 of Appendix for yearly numbers.)

In our 2009 report, we announced an increase of 13.6% in ad spending (again based on April). But Consumer Magazines recorded a decline of 15.6%, based on all of 2009. As might be expected, we were buoyed by our gain, but things weren't what they seemed. Since the 2009 result for the GLBT press was the number as of April, it did not capture the full impact of the financial downturn.

To document the duration and scope of the downturn, we turn to the CNBC show, *Market Watch*, which says that beginning in 2009 and continuing through the first quarter of 2010, newspaper print-ad spending saw double-digit declines for five straight quarters. In addition, the *New York Times* reports that magazines lost a quarter of their ad pages in 2009, and that ad pages were still down 9.4% during the first quarter of 2010.

Market Watch also observes that revenues began to improve during the second quarter of 2010, when declines slowed from double to single digits. By the end of 2010, things looked brighter.

The market for magazine ads apparently began to recover at the same time, as the Publishers Information Bureau recently reported that “magazine ad revenue and pages have [now] increased four quarters in a row, ever since the second quarter of 2010.”

Thus our 2009 figure (from April 2009) was determined *before* advertising revenues began to fall significantly (working to our advantage). And our 2010 figure (from April 2010) was determined *before* the recovery became evident (working to our disadvantage).

EXECUTIVE SUMMARY

- While 2009 represents the depths of the economic crisis, the second quarter of 2010 marks the beginning of the recovery. This timeline is evident in the aggregate figure for all Consumer Magazines, which registers a slump of \$10,533 million in 2009 (down 15.6% compared to 2008), and revenues of \$9,501 million in 2010. While the latter is still a loss, it is a smaller decrease than previously recorded – 9.8%. During the same time period, the GLBT press had a banner year in 2009, earning a record \$349.6 million (up 13.6% since 2008). In 2010, however, GLBT revenues plummeted to \$153.9 million, their lowest point in 12 years – a breathtaking decline of 56.0% from 2009.
 - What happened? While Consumer Magazines revenues are based on the entire year, the gay and lesbian press estimates its year-end revenues based on April. In 2009, the brunt of the economic crisis hit after April, and in 2010, most of the recovery began after April. Thus, GLBT revenues are likely overstated for 2009 and understated for 2010.
- Despite these results, cumulative growth in the gay and lesbian press continues to outpace growth in Consumer Magazines, as GLBT ad revenues have grown 110% since 1996 (the comparable figure for Consumer Magazines is 5%). This translates into compound annual growth rates (CAGR) of 5.4% and 0.4% respectively, demonstrating that ad revenues in the gay and lesbian press grew more than 13 times faster than that of Consumer Magazines during the same time period.
- The combined circulation of all GLBT publications is now 2,123,550, down 11.1% since 2009. As discussed below, as soon as publishers realized the economy was declining, some ceased publication, while others reduced their frequencies. Thus, circulation figures have clearly been affected, as has the number of ads.
- In 2010 we identify a total of 16,420 ads in the GLBT press, a significant decline of 23.5%. These ads are distributed as follows:
 - Local newspapers have a majority (61.4% of all ads), followed at a distance by local magazines (20.1%) and A&E guides (17.2%).
 - In contrast, national magazines account for just 1.3% of ads.
- The percent of gay-specific ads in the GLBT press (ads that refer to gay and lesbian lifestyles in graphics and/or message) continues to grow, and has now reached 72.4%, a 31% gain in percentage points since 2009. This is a remarkable change compared to 2002, when gay-specific content was found in only 9.9% of ads.
- In national GLBT magazines, where advertising pages are dominated by national brands, the percent of gay-specific ads is now 91.3%. (Just three years ago that proportion was 49.4%.) Thus, national advertisers have adopted gay-targeted creative as a best practice.

DETAILED FINDINGS

1. Advertising Spending in the Gay and Lesbian Press

2010 will go down in the books as the year advertising sales began to recover from the depths of 2009. During the financial crisis, print-ad spending plummeted. As a result, many newspapers and magazines ceased publication. Some re-organized, trying to cut costs while retaining their focus. Others published less often, and still others deliberately reduced circulation (doing away with free copies, etc).

Meanwhile, our figures show that in 2009 the GLBT press recorded its highest revenue ever (\$349.6 million), a respectable 13.6% gain over 2008, but in 2010 this figure has fallen to its lowest point in 12 years – \$153.9 million, a precipitous decline of 56.0% versus a year earlier. How could this happen, particularly when we now know that the decline in ad expenditures began in late 2008, reached its nadir in 2009, and then began to recover in the second quarter of 2010? (This timeline is apparent in figures for Consumer Magazines, which report \$9,501 in revenues for 2010, a 9.8% decline since 2009.)

As discussed at length in the methodology section (see above), advertising spending in the GLBT press is calculated differently from that of Consumer Magazines. Numbers for the former are based each year on records from April, which are used to approximate yearly numbers. In contrast, Consumer Magazines numbers are based on the year as a whole.

Since our 2009 numbers were tallied with regard to April 2009, they did not reflect the bulk of the decline in 2009, which took place in the months following April.

And because our 2010 figures indicate April 2010, they do not reflect the recovery that began during the second quarter of 2010 and gathered steam in the remainder of the year.

(Note: Advertising spending for Consumer Magazines includes advertising spending for the GLBT press. In this report, we analyze them separately, in order to highlight their differences.)

As is evident, advertising spending in Consumer Magazines is far greater than that in the gay and lesbian press. But – as shown by two different measures – the performance of advertising spending in the GLBT press outstrips that of Consumer Magazines, even in 2010 with disappointing results on both sides.

From 1996 to 2010, revenue for the gay and lesbian press increased by 110%; comparable spending for Consumer Magazines gained a much smaller 5%.

A calculation of compound annual growth rates (CAGR) indicates that spending for the gay and lesbian press rose more than 13 times the revenues for Consumer Magazines (achieving a CAGR of 5.4% versus that of 0.4% for Consumer Magazines).

2. Composition and Size of the Gay and Lesbian Press

As discussed earlier, each year we collect all gay and lesbian publications issued in the 29-day period beginning the first Friday in April (representing the totality of the gay and lesbian press), and proceed to count, measure, classify and analyze all the advertising featured in those publications.

Four types of publications are examined – three local (newspapers, magazines and A&E guides) and one national (magazines).

In April 2010, the GLBT press was composed of 209 issues (42 fewer than in 2009, down 16.7%), representing 109 individual titles (down from 136 in 2009, a decline of 19.9%).

These decreases reflect strategies used by the industry to conserve money throughout bad times, as some publishers decided to publish less often, while others simply ceased publication (with both actions resulting in reduced circulation).

Thus, the combined circulation of all gay and lesbian publications in 2010 was 2,123,550, down 11.1% compared to 2009. The steepest fall-off is noted in local magazines, which have lost 29.7% of their circulation, while local A&E Guides have declined 12.6%.

Despite these losses, local newspapers have gained circulation with an increase of 10.4%, and national magazines were able to manage a slight increase (1.4%).

3. Advertising Activity in the Gay and Lesbian Press

Distribution of Ads

Most GLBT advertising is placed in local publications (which account for 98.7% of all ads). Local newspapers capture a majority of these ads (61.4%), followed by local magazines (20.1%) and A&E guides (17.2%). Meanwhile, national magazines feature only 1.3%.

Growth in Number of Ads

In 2010, the total number of ads in the gay and lesbian press is 16,420, a substantial downturn of 23.5% since 2009.

All types of publications show significant losses – local magazines are down 17.2%, local newspapers have fallen 23.9%, and local A&E guides have declined 27.8%. But the biggest slide has taken place in national magazines, where the number of ads has dropped a startling 32.8%.

Number of Ad Pages

Similar downswings are noted in number of ad pages, which is not surprising, given that that measure correlates closely with number of ads. Overall, ad pages have slipped 20.7%.

As might be expected, declines in ad pages mirror declines in number of ads by type of publication. Thus local magazines have lost 13.0% of ad pages, and local newspapers have fallen 21.1%. Meanwhile, A&E guides have dropped 26.2%, but the largest tumble is observed in national magazines, where ad pages have plummeted 34.4%.

In spite of these disappointing results, the ratio of individual ads to ad pages continues to hold. In 2010, there are an average 1.51 ads per ad page. (In previous years, ratios were 1.56 in 2009; 1.49 in 2008; 1.51 in 2007; 1.50 in 2006; and 1.52 in 2005.)

4. **Broad-Based Product Categories Represented in the Gay and Lesbian Press**

Distribution of Ads

Eat & Drink is still the broad-based product category with the greatest number of ads (this grouping encompasses Bars & Clubs and Restaurants). In 2010, this category encompasses 17.7% of all GLBT ads, but is down 24.1%. Next largest is Services/Non-Medical, composed of ads larger than a business card (placed by lawyers and accountants, but not doctors), which is up 21.7%, having switched places with Professional Services, now in third place. Professional Services has ads about the size of a business card, from doctors, lawyers and accountants. This category represents 10.8% of all ads, and is down 32.2% since 2009.

Arts & Entertainment is fourth (7.5%), Retail fifth (6.7%), Health/Fitness/Grooming sixth (5.7%), Phone Services/Personals seventh (5.6%), Travel eighth (5.1%), and Medical/Health-Related and Real Estate (both 4.8%) are ninth.

From 2004-2007, Real Estate was among the top three product categories, but fell to seventh place in 2008, and eighth in 2009. In 2010, this category has continued to free-fall, and is now tied for ninth place with Medical/Health-Related.

Growth of Ads

Only three product categories register significant increases since 2009. Fashion & Accessories has the most remarkable gain – 50.7%. At a distance are Services/Non-Medical (up a respectable 21.7%), and Gay-Oriented Media (gaining 17.4%). Meanwhile, Home claims a modest 4.9% increase.

Four categories have numbers similar to what they were in 2009 (up or down by no more than 10%), but 11 show significant decreases. Categories falling by more than one-third include Financial Services (which has lost 33.8%), Health/Fitness/Grooming (declining 34.7%), Events (down a notable 50.0%), Beverage/Alcohol (tumbling 76.1%) and Classifieds (plunging an extraordinary 80.8%). While most of these are categories in which both advertisers and consumers are likely to reduce spending in a bad economy, the latter – Classifieds – is one in which much of its decline is probably due to the continuing migration of consumers to the Web.

To illustrate, Phone Services/Personals (similar to Classifieds) is a category in which advertisers seek companionship by using language like “GWM looking for ...” It has long been a mainstay of the gay and lesbian press, but its numbers peaked in 2004 at 3,829, and since then the whole category has been drifting toward the Internet. The decline of these ads has been startling. By 2006 its number fell to 1,904, and by 2008 it was composed of 977 ads. While there was a brief resurgence in 2009, by 2010 Phone Services/Personals fell again, to just 916.

5. **Line Item Product Categories Represented in the Gay and Lesbian Press**
(includes broad categories with no subcategories)

Considering the distribution of individual line items within broad-based product categories, we find that the top 10 (in order of percentage of all ads) are:

Services/Non-Medical (17.5%, up 21.7%). This broad-based category with no subcategories is making its first appearance as number one since 2005. (Four years ago, Real Estate was first; now it is tied for ninth.) Services/Non-Medical advertises the services of lawyers and other professionals (but not doctors) and, while similar to Professional Services (see below), utilizes larger ads. Since 2004, this category has included ads for professionals who provide wedding services.

Bars & Clubs (accounting for 12.6% of all ads). This classification has long been a pillar of GLBT advertising, occupying one of the top three slots since 2002. Bars & Clubs caters to a gay and gay-friendly clientele; such establishments often feature floor shows and/or sponsor theme nights. It is a subcategory of Eat & Drink, which along with Restaurants (see below), accounts for 17.7% of ads in the gay and lesbian press. Since 2009, however, Bars & Clubs has declined by 25.7% (Eat & Drink is down 24.1%). In a bad economy, consumers go out less often.

Professional Services (small-space ads, 10.8%, down 32.2%). This broad-based category has been among the top three since 2008. Most Professional Services ads are similar to business cards in both size and content. They advertise services from professionals, including lawyers, accountants and counselors. Some indicate that the advertiser runs a gay-owned and/or operated business, or is gay-friendly.

Retail Products & Services (6.3%, down 27.0%). This is the second time this line item has been among the top four. Such ads are a subcategory of Retail (which make up 6.7% of all ads), and cover all retail products except fashion/clothing, home décor and electronics.

Phone Services/Personals (5.6% of all ads, down 15.7%). While this broad-based product category is clearly in decline (as mentioned earlier), it is in fifth place here, given that overall, there are far fewer ads in 2010. Ads here include traditional personals, such as “GWF, 30-something, looking for a long-term relationship, loves dogs and Lady Gaga,” as well as ads for chat lines, escort services and special massage services. Phone Services/Personals ads have long been important in gay and lesbian advertising, but times are changing, and this category continues to migrate toward the Web.

Fitness/Health (5.3%, down 35.5% since 2009). Fitness/Health appears to have taken a big hit in the past couple of years, probably because of the shaky economy. Ads here are for local health clubs and other businesses that promote a healthy lifestyle. (Fitness/Health is the largest subcategory of Health/Fitness/Grooming, which now accounts for 5.7% of all ads in the gay and lesbian press.)

Restaurants (5.1%, down 19.7%). This line item usually makes our top ten, and is a subcategory – along with Bars & Clubs – of Eat & Drink (which totals 17.7% of all ads). It covers gay-owned or gay-friendly local restaurants, but does not include chains. Its weakness also reflects consumer behavior in a bad economy – the tightening of discretionary spending.

Real Estate (4.8% of all ads, down 33.3% since 2009). Real Estate is now eighth on this list, at its lowest level in eight years (after achieving first place in 2006, declining to third in 2007, falling to fifth place in 2008, and then seventh in 2009, reflecting the meteoric rise and fall of the housing market). Like their straight counterparts, gays and lesbians are interested in finding homes and condos for rent or sale in desirable areas. Moreover, they are particularly interested in communities known to be friendly to gays, and are responsive to ads pitched directly to them. (Real Estate is a broad-based product category with no subcategories.)

Theater/Dance (4.2%, down 37.3%). Theater/Dance has always been in the top ten, except for a brief absence in 2006. Here it is in ninth place. Theater/Dance ads promote Broadway shows and local and regional theaters, some of which feature gay-themed productions. (This item is a subcategory of Arts & Entertainment, accounting for 7.5% of all ads.)

Medical/Non-HIV (tied for tenth at 2.5%, down 23.3%). This category includes ads from physicians (internists and others) who provide general medical services to patients who do not need treatment for HIV.

Hotels/Resorts (tied for tenth at 2.5%, down 24.2%). Owners of hotels/resorts, inns and bed and breakfasts advertise their properties here.

6. Changes in Line Item Product Categories Since 2009

Even in this down year, 10 line items score significant upturns in number of ads since 2009. The most astounding change is Destinations, which placed only three ads in 2009, but accounts for 274 in 2010, an amazing increase of 9,033.3%. The next largest is Rental Cars, at 300%, although this result underscores the need to scrutinize numbers closely. While ads for rental cars are indeed up 300%, this represents an increase from one ad in 2009 to four in 2010. While this is an excellent result, there are still only four rental car ads in the gay and lesbian press in 2010.

If we set a rule to report only items that grow or decline beyond a count of 30, this would seem reasonable. But we would still have to keep an eye on low numbers. For example, ads for Help lines are up 206.3%, going from 16 to 49; Gay Magazines are up 165.0% (increasing from 40 to 106); and Pharmaceutical ads have risen 105.3% (from 19 to 39 ads).

Among line items with heftier numbers, Fashion/Clothing has expanded 98.6%, Gay Events/Meetings has gained 72.3%, Automobile Manufacturers has advanced 47.9%, Sports has increased 38.8%, and Home Furnishings/Décor has improved 18.5%.

At the same time, 13 categories are essentially the same as they were in 2009 (demonstrating no more than a 9.9% gain or loss in the number of ads).

Meanwhile, 30 line items reflect significant decreases. The largest of these are Viaticals (down 100%, from 6 ads in 2009 to none in 2010) and Electronics (also down 100%, from 26 ads to none). Of additional note are: Airlines (down 79.6%, from 49 ads to 10); Tobacco (declining 78.6%, from 14 ads to 3); Liquor/Non-Beer (falling 77.0%, from 148 ads to 34); and Recruiting/Jobs (sliding 76.1%, from 92 ads to 22).

Other significant declines include AIDS Events/Fundraisers (descending 67.5%, from 455 ads to 148); Travel Agents (declining 46.9%, from 239 to 127 ads); and Churches (dropping 43.0%, from 316 ads to 180).

Still other big losses (decreasing by more than 250 ads) are Theater/Dance (falling 37.3%), Fitness/Health (dropping 35.5%), Retail Products & Services (descending 27.0%), and Bars & Clubs (declining 25.7%).

7. Ads With Specific Gay and Lesbian Content

Percent of Gay-Specific Ads by Type of Publication

Gay-specific ads are ads that make direct reference to gay and lesbian consumers and their lifestyles through message and/or graphics. In 2010, the *percentage* of gay-specific ads in all GLBT publications reached 72.4%, an all-time high. This represents a gain of 10.5% percentage points over the previous year (up from 61.9%). (Separately, the finite *number* of gay-specific ads fell 10.5%. This occurred as part of the 23.5% decline in the total number of ads.)

Just nine years ago, in 2002, only 9.9% of all ads in the GLBT press were gay-specific. In 2003 that percentage grew to 15.1%, and in 2004 – the year Massachusetts initiated same-sex marriage – it jumped to 44.1%. By 2005, a slight majority of all ads – 50.3% – were gay-specific. In 2006, the percentage fell back to 48.6%, but rebounded and reached 52.2% in 2007. By 2008, it advanced to 57.4%, then rose to 61.9% in 2009, and has now reached an amazing 72.4%.

Reviewing the percentage of gay-specific ads by type of publication, we find that national magazines have the highest proportion of such ads (91.3%), followed by local A&E guides (86.8%) and local magazines (79.9%). Meanwhile, 65.5% of all local newspaper ads are gay-specific.

Since 2009, the biggest percentage gain has been in local magazines, where the proportion of gay-specific ads has grown 21.2%. Local newspapers have seen an increase of 18.0%, while local A&E guides account for a rise of 12.6%. In addition, gay-specific ads in national magazines are up 4.1%.

Number of Gay-Specific Ads by Type of Publication

Looking at the distribution of all gay-specific ads, the largest *number* were featured in local newspapers (accounting for 55.6% of all gay-specific ads), followed by local magazines (22.2%) and local A&E guides (representing 20.6%). In contrast, gay-specific ads accounted for just 1.6% of all ads appearing in national magazines.

As mentioned above, the *number* of gay-specific ads fell 10.5% since 2009. Declines were noted in all types of publications except local magazines, where the number of such ads is up 0.5%. The largest losses occurred in national magazines (whose numbers were down 30.0%). Meanwhile, gay-specific ads in local A&E guides were down 18.8%, and numbers for local newspapers declined 10.2% (mirroring the results shown in total ad counts; see p. 12).

8. Broad-Based Product Categories With Specific Gay and Lesbian Content

Distribution of Ads

Again, the percentage of ads in the gay and lesbian press that are gay-specific is now 72.4%, up from 61.9% in 2009. In addition, a majority of ads in 14 of the 18 broad-based product categories is now explicitly gay.

For some time now, the leading category in this regard has been Phone Services/ Personals. As of 2010, an astounding 100% of ads in this category are gay-specific. Other categories in which at least three-quarters of the ads are gay-specific include: Gay-Oriented Media (in which 99.9% of ads are gay-specific), Classifieds (accounting for 97.8%), Travel (97.4%), Events (95.4%), Health/ Fitness/Grooming (85.5%), Eat & Drink (83.3%) and Professional Services (78.6%).

Classifications which have the smallest proportions of gay-specific ads are Automotive (18.9%), with campaigns from Subaru and Volvo not appearing in 2009, Beverage/Alcohol (30.2%) and Home (35.1%).

Growth in Percentage of Ads

Since 2009, the proportion of gay-specific ads in the Medical/Health-Related category has grown by 113.9%. Other notable increases are: Financial Services (gaining 89.4%), Home (achieving 80.9%), and Professional Services (up 79.0%).

Gains in percentages are also evident in A&E ads (rising 53.2%), Real Estate (climbing 48.3%), and Services/Non-Medical (reaching 41.4%). In addition, there is an 18.1% increase in Automotive, Retail is up 16.6%, Fashion & Accessories is ahead 11.7%, and Classifieds has risen 11.6%.

Only one category records a significant decline in percent of gay-specific ads – Beverage/Alcohol, which has fallen 37.3%. Eat & Drink is also down 3.9%.

APPENDIX

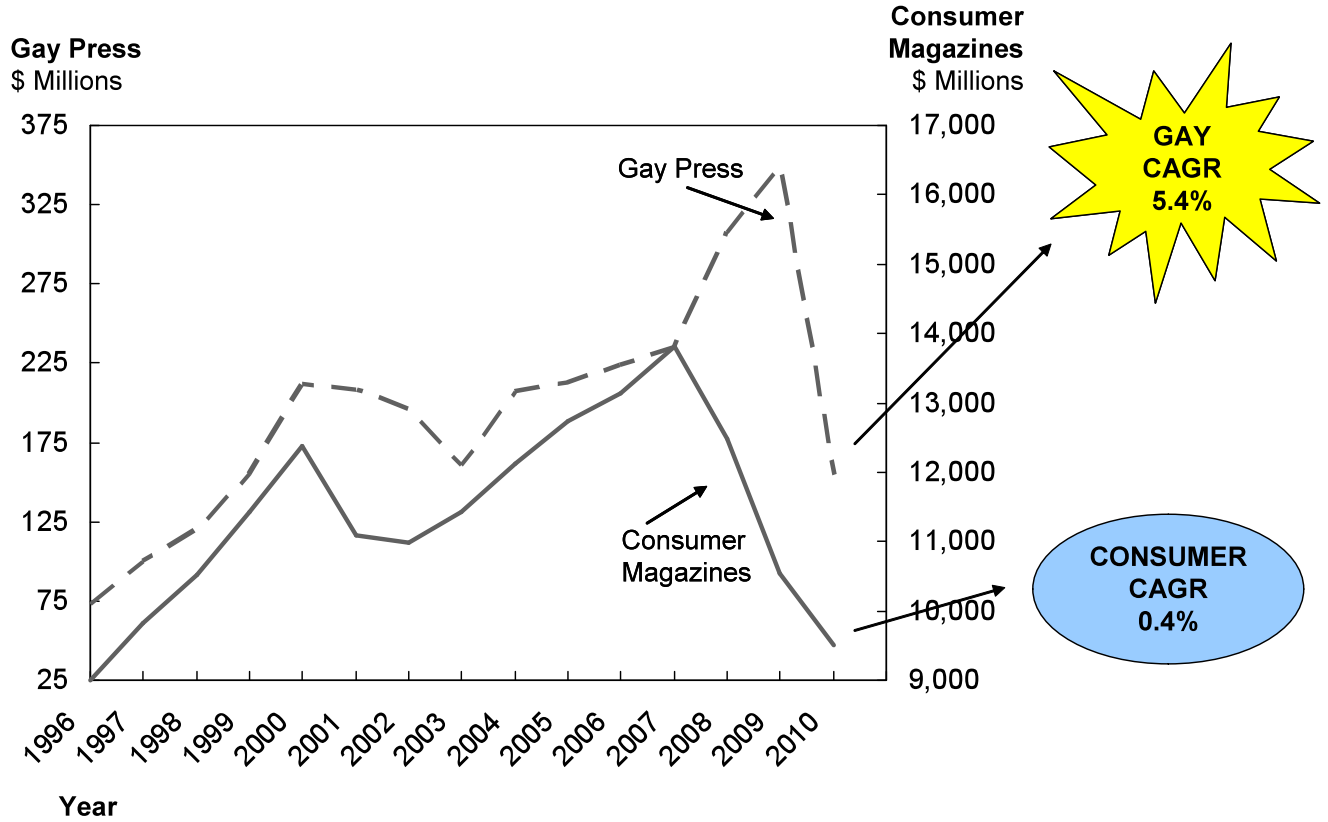
2010 GAY PRESS REPORT

ADVERTISING SPENDING				
Year	Gay Press		Consumer Magazines	
	\$ Millions	Change	\$ Millions	Change
1994	53.0			
1995	61.6	16.2%		
1996	73.3	19.0	9,010.0	5.0%
1997	100.2	36.7	9,821.0	9.0
1998	120.4	20.2	10,518.0	7.1
1999	155.3	29.0	11,433.0	8.7
2000	211.6	36.3	12,370.0	8.2
2001	208.1	-1.7	11,095.0	-10.3
2002	196.0	-5.8	10,990.0	-0.9
2003	161.2	-17.8	11,435.0	4.0
2004	207.0	28.4	12,121.0	6.0
2005	212.2	2.5	12,729.0	5.0
2006	223.3*	5.2	13,147.0	3.3
2007	234.6	5.1	13,817.0	5.1
2008	307.7	31.2	12,480.0	-9.7
2009	349.6	13.6	10,533.0	-15.6
2010	153.9	-56.0	9,501	-9.8

Source: Consumer magazine numbers are from Veronis Suhler Stevenson, as featured in its publication, *VSS Communications Industry Forecast, 2010-2013*. All numbers represent actual expenditures except for 2009 and 2010, which are projections.

* This figure may be underreported, as it is based on unweighted data.

GROWTH IN AD SPENDING – GAY PRESS VS. CONSUMER MAGAZINES (Compound Annual Growth Rate 1996-2010)



<i>Number of Issues Analyzed by Type of Publication</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Total Issues Analyzed	251	100.0	209	100.0	-16.7
Local Newspapers	130	51.8	117	56.0	-10.0
Local Magazines	66	26.3	56	26.8	-15.2
Local A&E Guides	48	19.1	31	14.8	-35.4
National Magazines	7	2.8	5	2.4	-28.6

<i>Circulation by Type of Publication</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Total Circulation	2,387,750	100.0	2,123,550	100.0	-11.1
Local Newspapers	736,600	30.9	813,400	38.3	10.4
Local Magazines	1,065,650	44.6	749,150	35.3	-29.7
Local A&E Guides	234,500	9.8	205,000	9.6	-12.6
National Magazines	351,000	14.7	356,000	16.8	1.4

<i>Number of Ads by Category</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Total Number of Ads	21,461	100%	16,420	100%	-23.5
Real Estate	1,183	5.5	789	4.8	-33.3
Financial Services	474	2.2	314	1.9	-33.8
Viaticals	6	*	0	0	-100.0
Mortgages	104	0.5	37	0.2	-64.4
Banks	54	0.3	30	0.2	-44.4
Insurance	173	0.8	144	0.9	-16.8
Investments	135	0.6	101	0.6	-25.2
Credit Cards	2	*	2	*	0
Health/Fitness/Grooming	1,440	6.7	941	5.7	-34.7
Fitness/Health	1,346	6.3	868	5.3	-35.5
Cosmetics	94	0.4	69	0.4	-26.6
Hair Growth	0	0	4	*	0
Vitamins	0	0	0	0	0
Medical/Health-Related	855	4.0	788	4.8	-7.8
Pharmaceuticals	19	0.1	39	0.2	105.3
Medical/HIV	283	1.3	288	1.8	1.8
Medical/Non-HIV	537	2.5	412	2.5	-23.3
Helplines	16	0.1	49	0.3	206.3
Arts & Entertainment	1,694	7.9	1,235	7.5	-27.1
Theater/Dance	1,087	5.1	682	4.2	-37.3
Movies/Video	267	1.2	268	1.6	0.4
Records/CDs/Concerts	124	0.6	116	0.7	-6.5
Books/Bookstores	96	0.5	56	0.3	-41.7
Sports	49	0.2	68	0.4	38.8
Comedy	14	0.1	8	0.1	-42.9
TV/Cable	31	0.1	23	0.1	-25.8
Radio	26	0.1	14	0.1	-46.2
Travel	841	3.9	831	5.1	-1.2
Hotels/Resorts	549	2.6	416	2.5	-24.2
Destinations	3	*	274	1.7	9,033.3
Travel Agents	239	1.1	127	0.8	-46.9
Airlines	49	0.2	10	0.1	-79.6
Rental Cars	1	*	4	*	300.0
Eat & Drink	3,829	17.9	2,908	17.7	-24.1
Bars & Clubs	2,792	13.0	2,075	12.6	-25.7
Restaurants	1,037	4.9	833	5.1	-19.7

<i>Number of Ads by Category (continued)</i>					
	2009		2010		Change %
	#	%	#	%	2009-2010
Total Number of Ads	21,461	100%	16,420	100%	-23.5
Events	520	2.4	260	1.6	-50.0
Gay Events/Meetings	65	0.3	112	0.7	72.3
Regular Events/Entertainment	0	0	0	0	0
AIDS Events/Fundraisers	455	2.1	148	0.9	-67.5
Retail	1,566	7.3	1,091	6.7	-30.3
Retail Products & Services	1,418	6.6	1,035	6.3	-27.0
Food & Markets	122	0.6	56	0.4	-54.1
Electronics	26	0.1	0	0	-100.0
Home	263	1.2	276	1.7	4.9
Home Furnishings/Décor	162	0.7	192	1.2	18.5
Florists/Nurseries	101	0.5	84	0.5	-16.8
Fashion & Accessories	146	0.7	220	1.3	50.7
Fashion/Clothing	70	0.3	139	0.8	98.6
Jewelry	76	0.4	81	0.5	6.6
Beverage/Alcohol	222	1.0	53	0.3	-76.1
Liquor/Non-Beer	148	0.7	34	0.2	-77.0
Beer	74	0.3	19	0.1	-74.3
Gay-Oriented Media	265	1.2	311	1.9	17.4
Gay Magazines	40	0.2	106	0.6	165.0
Gay Internet Sites	225	1.0	205	1.3	-8.9
Automotive	213	1.0	196	1.2	-8.0
Dealers	119	0.6	57	0.4	-52.1
Manufacturers	94	0.4	139	0.8	47.9
Professional Services (small space ads)	2,624	12.2	1,778	10.8	-32.2
Services/Non-Medical	2,355	11.0	2,867	17.5	21.7
Phone Services/Personals	1,087	5.1	916	5.6	-15.7
Classifieds	1,211	5.7	232	1.4	-80.8
Other	673	3.1	414	2.5	-38.5
Recruiting/Jobs	92	0.4	22	0.1	-76.1
Church	316	1.5	180	1.1	-43.0
Pets & Vets	169	0.8	155	0.9	-8.3
Funeral Services	15	0.1	14	0.1	-6.7
Tobacco	14	*	3	*	-78.6
Politics	33	0.1	30	0.2	-9.1
Long Distance/Cellular	34	0.2	10	0.1	-70.6
Magazines (non-gay)	0	0	0	0	0

<i>Number of Ads by Category – Changes 2009-2010</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Notable Increases					
Fashion & Accessories	146	0.7	220	1.3	50.7
Services/Non-Medical	2,355	11.0	2,867	17.5	21.7
Gay-Oriented Media	265	1.2	311	1.9	17.4
About the Same					
Home	263	1.2	276	1.7	4.9
Travel	841	3.9	831	5.1	-1.2
Medical/Health-Related	855	4.0	788	4.8	-7.8
Automotive	213	1.0	196	1.2	-8.0
Notable Decreases					
Phone Services/Personals	1,087	5.1	916	5.6	-15.7
Eat & Drink	3,829	17.9	2,908	17.7	-24.1
Arts & Entertainment	1,694	7.9	1,235	7.5	-27.1
Retail	1,566	7.3	1,091	6.7	-30.3
Professional Services (small space ads)	2,624	12.2	1,778	10.8	-32.2
Real Estate	1,183	5.5	789	4.8	-33.3
Financial Services	474	2.2	314	1.9	-33.8
Health/Fitness/Grooming	1,440	6.7	941	5.7	-34.7
Events	520	2.4	260	1.6	-50.0
Beverage/Alcohol	222	1.0	53	0.3	-76.1
Classifieds	1,211	5.7	232	1.4	-80.8

<i>Number of Ads by Individual Items – Changes 2009-2010</i>					
	2009		2010		Change %
	#	%	#	%	2009-2010
Notable Increases					
Destinations	3	*	274	1.7	9,033.3
Rental Cars	1	*	4	*	300.0
Helplines	16	0.1	49	0.3	206.3
Gay Magazines	40	0.2	106	0.6	165.0
Pharmaceuticals	19	0.1	39	0.2	105.3
Fashion/Clothing	70	0.3	139	0.8	98.6
Gay Events/Meetings	65	0.3	112	0.7	72.3
Automobile Manufacturers	94	0.4	139	0.8	47.9
Sports	49	0.2	68	0.4	38.8
Home Furnishings/Décor	162	0.7	192	1.2	18.5
About the Same					
Jewelry	76	0.4	81	0.5	6.6
Medical/HIV	283	1.3	288	1.8	1.8
Movies/Video	267	1.2	268	1.6	0.4
Hair Growth	0	0	4	*	0
Credit Cards	2	*	2	*	0
Vitamins	0	0	0	0	0
Regular Events/Entertainment	0	0	0	0	0
Magazines (non-gay)	0	0	0	0	0
Records/CDs/Concerts	124	0.6	116	0.7	-6.5
Funeral Services	15	0.1	14	0.1	-6.7
Pets & Vets	169	0.8	155	0.9	-8.3
Gay Internet Sites	225	1.0	205	1.3	-8.9
Politics	33	0.1	30	0.2	-9.1
Notable Decreases					
Florists/Nurseries	101	0.5	84	0.5	-16.8
Insurance	173	0.8	144	0.9	-16.8
Restaurants	1,037	4.9	833	5.1	-19.7
Medical/Non-HIV	537	2.5	412	2.5	-23.3
Hotels/Resorts	549	2.6	416	2.5	-24.2
Investments	135	0.6	101	0.6	-25.2
Bars & Clubs	2,792	13.0	2,075	12.6	-25.7
TV/Cable	31	0.1	23	0.1	-25.8
Cosmetics	94	0.4	69	0.4	-26.6

<i>Number of Ads by Individual Items – Changes 2009-2010</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Notable Decreases (continued)					
Retail Products & Services	1,418	6.6	1,035	6.3	-27.0
Fitness/Health	1,346	6.3	868	5.3	-35.5
Theater/Dance	1,087	5.1	682	4.2	-37.3
Books/Bookstores	96	0.5	56	0.3	-41.7
Comedy	14	0.1	8	0.1	-42.9
Church	316	1.5	180	1.1	-43.0
Banks	54	0.3	30	0.2	-44.4
Radio	26	0.1	14	0.1	-46.2
Travel Agents	239	1.1	127	0.8	-46.9
Automobile Dealers	119	0.6	57	0.4	-52.1
Food & Markets	122	0.6	56	0.4	-54.1
Mortgages	104	0.5	37	0.2	-64.4
AIDS Events/Fundraisers	455	2.1	148	0.9	-67.5
Long Distance/Cellular	34	0.2	10	0.1	-70.6
Liquor/Beer	74	0.3	19	0.1	-74.3
Recruiting/Jobs	92	0.4	22	0.1	-76.1
Liquor/Non-Beer	148	0.7	34	0.2	-77.0
Tobacco	14	*	3	*	-78.6
Airlines	49	0.2	10	0.1	-79.6
Electronics	26	0.1	0	0	-100.0
Viaticals	6	*	0	0	-100.0

Number of Ads by Category by Type of Publication					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Local Newspapers	13,252	100%	10,086	100%	-23.9
Services/Non-Medical	1,715	12.9	2,196	21.8	28.0
Professional Services (small space)	2,067	15.6	1,585	15.7	-23.3
Eat & Drink	1,466	11.1	1,155	11.4	-21.2
Arts & Entertainment	1,106	8.3	824	8.2	-25.5
Retail	942	7.1	717	7.1	-23.9
Medical/Health-Related	570	4.3	513	5.1	-10.0
Health/Fitness/Grooming	869	6.5	511	5.1	-41.2
Real Estate	697	5.3	490	4.8	-29.7
Phone Services/Personals	461	3.5	392	3.9	-15.0
Travel	445	3.4	308	3.0	-30.8
Financial Services	364	2.7	219	2.2	-39.8
Home	160	1.2	179	1.8	11.9
Automotive	166	1.2	159	1.6	-4.2
Gay-Oriented Media	122	0.9	141	1.4	15.6
Classifieds	1,069	8.1	133	1.3	-87.6
Events	328	2.5	132	1.3	-59.8
Fashion & Accessories	74	0.6	110	1.1	48.6
Beverage/Alcohol	102	0.8	27	0.3	-73.5
Other	529	4.0	295	2.9	-44.2
Local Magazines	3,986	100%	3,301	100%	-17.2
Eat & Drink	970	24.3	751	22.7	-22.6
Services/Non-Medical	318	8.0	384	11.6	20.8
Arts & Entertainment	390	9.8	298	9.0	-23.6
Travel	104	2.6	261	7.9	151.0
Health/Fitness/Grooming	288	7.2	256	7.8	-11.1
Retail	370	9.3	220	6.7	-40.5
Phone Services/Personals	307	7.7	149	4.5	-51.5
Real Estate	157	4.0	148	4.5	-5.7
Medical/Health-Related	129	3.2	134	4.1	3.9
Professional Services (small space)	328	8.2	131	4.0	-60.1
Gay-Oriented Media	69	1.7	127	3.8	84.1
Events	96	2.4	118	3.6	22.9
Financial Services	85	2.1	71	2.1	-16.5
Home	47	1.2	64	1.9	36.2
Fashion & Accessories	36	0.9	43	1.3	19.4
Classifieds	125	3.1	39	1.2	-68.8
Automotive	31	0.8	26	0.8	-16.1
Beverage/Alcohol	34	0.9	12	0.4	-64.7
Other	102	2.6	69	2.1	-32.4

<i>Number of Ads by Category by Type of Publication</i>					
	2009		2010		Change %
	#	%	#	%	2009-2010
Local A&E Guides	3,915	100%	2,826	100%	-27.8
Eat & Drink	1,327	33.9	980	34.7	-26.1
Phone Services/Personals	319	8.1	375	13.3	17.6
Services/Non-Medical	306	7.8	282	10.0	-7.8
Travel	153	3.9	170	6.0	11.1
Health/Fitness/Grooming	277	7.1	169	6.0	-39.0
Real Estate	329	8.4	151	5.3	-54.1
Retail	234	6.0	147	5.2	-37.2
Medical/Health-Related	152	3.9	131	4.6	-13.8
Arts & Entertainment	175	4.5	99	3.5	-43.4
Classifieds	17	0.4	60	2.1	252.9
Fashion & Accessories	27	0.7	58	2.0	114.8
Professional Services (small space)	224	5.7	44	1.6	-80.4
Home	55	1.4	33	1.2	-40.0
Gay-Oriented Media	69	1.8	28	1.0	-59.4
Financial Services	20	0.5	20	0.7	0
Beverage/Alcohol	83	2.1	12	0.4	-85.5
Events	92	2.4	10	0.4	-89.1
Automotive	15	0.4	9	0.3	-40.0
Other	41	1.0	48	1.7	17.1
National Magazines	308	100%	207	100%	-32.8
Travel	139	45.2	92	44.4	-33.8
Eat & Drink	66	21.4	22	10.6	-66.7
Professional Services (small space)	5	1.6	18	8.7	260.0
Gay-Oriented Media	5	1.6	15	7.2	200.0
Arts & Entertainment	23	7.5	14	6.8	-39.1
Medical/Health-Related	4	1.3	10	4.8	150.0
Fashion & Accessories	9	2.9	9	4.4	0
Retail	20	6.5	7	3.4	-65.0
Services/Non-Medical	16	5.2	5	2.4	-68.8
Health/Fitness/Grooming	6	2.0	5	2.4	-16.7
Financial Services	5	1.6	4	1.9	-20.0
Beverage/Alcohol	3	1.0	2	1.0	-33.3
Automotive	1	0.3	2	1.0	100.0
Events	4	1.3	0	0	-100.0
Home	1	0.3	0	0	-100.0
Classifieds	0	0	0	0	0
Real Estate	0	0	0	0	0
Phone Services/Personals	0	0	0	0	0
Other	1	0.3	2	1.0	100.0

<i>Number of Ad Pages by Category</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Total Number of Pages	13,725	100%	10,887	100%	-20.7
Real Estate	685	5.0	523	4.8	-23.6
Financial Services	394	2.9	291	2.7	-26.1
Viaticals	6	*	0	0	-100.0
Mortgages	60	0.4	37	0.3	-38.3
Banks	54	0.4	27	0.3	-50.0
Insurance	155	1.1	128	1.2	-17.4
Investments	119	0.9	97	0.9	-18.5
Credit Cards	0	0	2	*	0
Health/Fitness/Grooming	728	5.3	563	5.1	-22.7
Fitness/Health	634	4.6	490	4.5	-22.7
Cosmetic	94	0.7	69	0.6	-26.6
Hair Growth	0	0	4	*	0
Vitamins	0	0	0	0	0
Medical/Health-Related	779	5.7	663	6.1	-14.9
Pharmaceuticals	19	0.2	39	0.4	105.3
Medical/HIV	264	1.9	194	1.8	-26.5
Medical/Non-HIV	480	3.5	381	3.5	-20.6
Helplines	16	0.1	49	0.4	206.3
Arts & Entertainment	1,407	10.3	1,032	9.5	-26.7
Theater/Dance	847	6.2	546	5.0	-35.5
Movies/Video	237	1.7	210	1.9	-11.4
Records/CDs/Concerts	114	0.8	114	1.1	0
Books/Bookstores	90	0.7	53	0.5	-41.1
Sports	49	0.4	64	0.6	30.6
Comedy	14	0.1	8	0.1	-42.9
TV/Cable	30	0.2	23	0.2	-23.3
Radio	26	0.2	14	0.1	-46.2
Travel	646	4.7	661	6.1	2.3
Hotels/Resorts	377	2.7	279	2.6	-26.0
Destinations	3	*	259	2.4	8,533.3
Travel Agents	216	1.6	109	1.0	-49.5
Airlines	49	0.4	10	0.1	-79.6
Rental Cars	1	*	4	*	300.0
Eat & Drink	2,957	21.5	2,431	22.3	-17.8
Bars & Clubs	2,337	17.0	1,813	16.6	-22.4
Restaurants	620	4.5	618	5.7	-0.3

<i>Number of Ad Pages by Category (continued)</i>					
	2009		2010		Change %
	#	%	#	%	2009-2010
Total Number of Pages	13,725	100%	10,887	100%	-20.7
Events	512	3.7	256	2.3	-50.0
Gay Events/Meetings	64	0.5	109	1.0	70.3
Regular Events/Entertainment	0	0	0	0	0
AIDS Events/Fundraisers	448	3.2	147	1.3	-67.2
Retail	1,221	8.9	901	8.3	-26.2
Retail Products & Services	1,114	8.1	845	7.8	-24.1
Food & Markets	82	0.6	56	0.5	-31.7
Electronics	25	0.2	0	0	-100.0
Home	254	1.8	258	2.4	1.6
Home Furnishings/Décor	154	1.1	183	1.7	18.8
Florists/Nurseries	100	0.7	75	0.7	-25.0
Fashion & Accessories	146	1.1	173	1.6	18.5
Fashion/Clothing	70	0.5	100	0.9	42.9
Jewelry	76	0.6	73	0.7	-3.9
Beverage/Alcohol	222	1.6	53	0.5	-76.1
Liquor/Non-Beer	148	1.1	34	0.3	-77.0
Beer	74	0.5	19	0.2	-74.3
Gay-Oriented Media	261	1.9	269	2.5	3.1
Gay Magazines	40	0.3	99	0.9	147.5
Gay Internet Sites	221	1.6	170	1.6	-23.1
Automotive	205	1.5	173	1.6	-15.6
Dealers	119	0.9	57	0.5	-52.1
Manufacturers	86	0.6	116	1.1	34.9
Professional Services (small space ads)	401	2.9	284	2.6	-29.2
Services/Non-Medical	1,290	9.4	1,479	13.6	14.7
Phone Services/Personals	560	4.1	306	2.8	-45.4
Classifieds	532	3.9	225	2.0	-57.7
Other	525	3.8	346	3.2	-34.1
Recruiting/Jobs	88	0.6	22	0.2	-75.0
Church	190	1.4	143	1.3	-24.7
Pets & Vets	151	1.1	127	1.2	-15.9
Funeral Services	15	0.1	14	0.1	-6.7
Tobacco	14	0.1	3	*	-78.6
Politics	33	0.2	27	0.3	-18.2
Long Distance/Cellular	34	0.3	10	0.1	-70.6
Magazines (non-gay)	0	0	0	0	0

<i>Percentage of Gay-Specific Ads by Type of Publication</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Total Gay-Specific Ads	13,276	61.9	11,888	72.4	17.0
Local Newspapers	7,361	55.5	6,610	65.5	18.0
Local Magazines	2,625	65.9	2,637	79.9	21.2
Local A&E Guides	3,020	77.1	2,452	86.8	12.6
National Magazines	270	87.7	189	91.3	4.1

<i>Number of Gay-Specific Ads by Type of Publication</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Total Gay-Specific Ads	13,276	100%	11,888	100%	-10.5
Local Newspapers	7,361	55.4	6,610	55.6	-10.2
Local Magazines	2,625	19.8	2,637	22.2	0.5
Local A&E Guides	3,020	22.8	2,452	20.6	-18.8
National Magazines	270	2.0	189	1.6	-30.0

<i>Number of Gay-Specific Ads by Category</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Total Number of Ads	13,276	100%	11,888	100%	-10.5
Real Estate	522	3.9	516	4.3	-1.1
Financial Services	152	1.1	191	1.6	25.7
Viaticals	0	0	0	0	0
Mortgages	23	0.2	20	0.2	-13.0
Banks	22	0.1	20	0.2	-9.1
Insurance	55	0.4	102	0.8	85.5
Investments	52	0.4	49	0.4	-5.8
Credit Cards	0	0	0	0	0
Health/Fitness/Grooming	1,168	8.8	805	6.8	-31.1
Fitness/Health	1,142	8.6	768	6.5	-32.7
Cosmetics	26	0.2	34	0.3	30.8
Hair Growth	0	0	3	*	0
Vitamins	0	0	0	0	0
Medical/Health-Related	239	1.8	472	4.0	97.5
Pharmaceuticals	1	*	27	0.2	2,600.0
Medical/HIV	84	0.6	235	2.0	179.8
Medical/Non-HIV	145	1.1	162	1.4	11.7
Helplines	9	0.1	48	0.4	433.3
Arts & Entertainment	793	6.0	886	7.5	11.7
Theater/Dance	374	2.8	413	3.5	10.4
Movies/Video	194	1.5	268	2.2	38.1
Records/CDs/Concerts	43	0.3	71	0.6	65.1
Books/Bookstores	91	0.7	50	0.4	-45.1
Sports	44	0.3	60	0.5	36.4
Comedy	14	0.1	8	0.1	-42.9
TV/Cable	13	0.1	9	0.1	-30.8
Radio	20	0.2	7	0.1	-65.0
Travel	794	6.0	809	6.8	1.9
Hotels/Resorts	525	4.0	404	3.4	-23.0
Destinations	3	*	272	2.3	8,966.7
Travel Agents	239	1.8	124	1.0	-48.1
Airlines	27	0.2	6	0.1	-77.8
Rental Cars	0	0	3	*	0
Eat & Drink	3,319	25.0	2,421	20.4	-27.1
Bars & Clubs	2,777	20.9	2,075	17.5	-25.3
Restaurants	542	4.1	346	2.9	-36.2

<i>Number of Gay-Specific Ads by Category (continued)</i>					
	2009		2010		Change %
	#	%	#	%	2009-2010
Total Number of Ads	13,276	100%	11,888	100%	-10.5
Events	459	3.5	248	2.1	-46.0
Gay Events/Meetings	64	0.5	111	0.9	73.4
Regular Events/Entertainment	0	0	0	0	0
AIDS Events/Fundraisers	395	3.0	137	1.2	-65.3
Retail	670	5.0	544	4.6	-18.8
Retail Products & Services	616	4.6	524	4.4	-14.9
Food & Markets	35	0.3	20	0.2	-42.9
Electronics	19	0.1	0	0	-100.0
Home	51	0.4	97	0.8	90.2
Home Furnishings/Décor	47	0.4	63	0.5	34.0
Florists/Nurseries	4	*	34	0.3	750.0
Fashion & Accessories	66	0.5	111	0.9	68.2
Fashion/Clothing	55	0.4	75	0.6	36.4
Jewelry	11	0.1	36	0.3	227.3
Beverage/Alcohol	107	0.8	16	0.1	-85.0
Liquor/Non-Beer	73	0.5	4	*	-94.5
Beer	34	0.3	12	0.1	-64.7
Gay-Oriented Media	252	1.9	308	2.6	22.2
Gay Magazines	40	0.3	106	0.9	165.0
Gay Internet Sites	212	1.6	202	1.7	-4.7
Automotive	34	0.2	37	0.3	8.8
Dealers	27	0.2	25	0.2	-7.4
Manufacturers	7	*	12	0.1	71.4
Professional Services (small space ads)	1,151	8.7	1,398	11.8	21.5
Services/Non-Medical	969	7.3	1,667	14.0	72.0
Phone Services/Personals	1,071	8.1	916	7.7	-14.5
Classifieds	1,061	8.0	227	1.9	-78.6
Other	398	3.0	219	1.8	-45.0
Recruiting/Jobs	83	0.6	21	0.2	-74.7
Church	260	2.0	154	1.3	-40.8
Pets & Vets	31	0.2	16	0.1	-48.4
Funeral Services	0	0	2	*	0
Tobacco	3	*	1	*	-66.7
Politics	21	0.2	24	0.2	14.3
Long Distance/Cellular	0	0	1	*	0
Magazines (non-gay)	0	0	0	0	0

<i>Percent of Gay-Specific Ads by Category</i>					
	2009		2010		Change %
	#	%	#	%	2009-2010
Total Gay-Specific Ads	13,276	61.9	11,888	72.4	17.0
Phone Services/Personals	1,071	98.5	916	100.0	1.5
Gay-Oriented Media	252	95.1	308	99.9	4.1
Classifieds	1,061	87.6	227	97.8	11.6
Travel	794	94.4	809	97.4	3.2
Events	459	88.3	248	95.4	8.0
Health/Fitness/Grooming	1,168	81.1	805	85.5	5.4
Eat & Drink	3,319	86.7	2,421	83.3	-3.9
Professional Services (small space ads)	1,151	43.9	1,398	78.6	79.0
Arts & Entertainment	793	46.8	886	71.7	53.2
Real Estate	522	44.1	516	65.4	48.3
Financial Services	152	32.1	191	60.8	89.4
Medical/Health-Related	239	28.0	472	59.9	113.9
Services/Non-Medical	969	41.1	1,667	58.1	41.4
Fashion & Accessories	66	45.2	111	50.5	11.7
Retail	670	42.8	544	49.9	16.6
Home	51	19.4	97	35.1	80.9
Beverage/Alcohol	107	48.2	16	30.2	-37.3
Automotive	34	16.0	37	18.9	18.1

<i>Number of Gay-Specific Ad Pages</i>					
	2009		2010		Change % 2009-2010
	#	%	#	%	
Total Number of Pages	8,523	100%	7,902	100%	-7.3
Real Estate	261	3.1	314	4.0	20.3
Financial Services	145	1.7	176	2.2	21.4
Viaticals	0	0	0	0	0
Mortgages	21	0.2	20	0.3	-4.8
Banks	22	0.3	17	0.2	-22.7
Insurance	50	0.6	91	1.1	82.0
Investments	52	0.6	48	0.6	-7.7
Credit Cards	0	0	0	0	0
Health/Fitness/Grooming	469	5.5	458	5.8	-2.3
Fitness/Health	443	5.2	421	5.3	-5.0
Cosmetic	26	0.3	34	0.4	30.8
Hair Growth	0	0	3	*	0
Vitamins	0	0	0	0	0
Medical/Health-Related	230	2.7	367	4.6	59.6
Pharmaceuticals	1	*	27	0.3	2,600.0
Medical/HIV	84	1.0	141	1.8	67.9
Medical/Non-HIV	136	1.6	151	1.9	11.0
Helplines	9	0.1	48	0.6	433.3
Arts & Entertainment	654	7.7	752	9.5	15.0
Theater/Dance	266	3.1	345	4.4	29.7
Movies/Video	170	2.0	210	2.6	23.5
Records/CDs/Concerts	43	0.5	70	0.9	62.8
Books/Bookstores	85	1.0	47	0.6	-44.7
Sports	44	0.5	56	0.7	27.3
Comedy	14	0.2	8	0.1	-42.9
TV/Cable	12	0.2	9	0.1	-25.0
Radio	20	0.2	7	0.1	-65.0
Travel	599	7.0	639	8.1	6.7
Hotels/Resorts	353	4.2	267	3.4	-24.4
Destinations	3	*	257	3.3	8,466.7
Travel Agents	216	2.5	106	1.3	-50.9
Airlines	27	0.3	6	0.1	-77.8
Rental Cars	0	0	3	*	0
Eat & Drink	2,669	31.3	2,096	26.5	-21.5
Bars & Clubs	2,322	27.2	1,813	22.9	-21.9
Restaurants	347	4.1	283	3.6	-18.4

Number of Gay-Specific Ad Pages (continued)					
	2009		2010		Change %
	#	%	#	%	2009-2010
Total Number of Ads	8,523	100%	7,902	100%	-7.3
Events	452	5.3	244	3.1	-46.0
Gay Events/Meetings	63	0.7	108	1.4	71.4
Regular Events/Entertainment	0	0	0	0	0
AIDS Events/Fundraisers	389	4.6	136	1.7	-65.0
Retail	488	5.7	467	5.9	-4.3
Retail Products & Services	446	5.2	447	5.7	0.2
Food & Markets	23	0.3	20	0.2	-13.0
Electronics	19	0.2	0	0	-100.0
Home	47	0.5	90	1.1	91.5
Home Furnishings/Décor	43	0.5	63	0.8	46.5
Florists/Nurseries	4	*	27	0.3	575.0
Fashion & Accessories	66	0.8	93	1.2	40.9
Fashion/Clothing	55	0.7	63	0.8	14.5
Jewelry	11	0.1	30	0.4	172.7
Beverage/Alcohol	107	1.3	16	0.2	-85.0
Liquor/Non-Beer	73	0.9	4	*	-94.5
Beer	34	0.4	12	0.2	-64.7
Gay-Oriented Media	248	2.9	266	3.4	7.3
Gay Magazines	40	0.5	99	1.3	147.5
Gay Internet Sites	208	2.4	167	2.1	-19.7
Automotive	34	0.4	37	0.5	8.8
Dealers	27	0.3	25	0.3	-7.4
Manufacturers	7	0.1	12	0.2	71.4
Professional Services (small space ads)	177	2.1	226	2.8	27.7
Services/Non-Medical	642	7.5	956	12.1	48.9
Phone Services/Personals	544	6.4	306	3.9	-43.8
Classifieds	385	4.5	220	2.8	-42.9
Other	306	3.6	179	2.3	-41.5
Recruiting/Jobs	79	0.9	21	0.3	-73.4
Church	172	2.0	118	1.5	-31.4
Pets & Vets	31	0.4	15	0.2	-51.6
Funeral Services	0	0	2	*	0
Tobacco	3	*	1	*	-66.7
Politics	21	0.3	21	0.3	0
Long Distance/Cellular	0	0	1	*	0
Magazines (non-gay)	0	0	0	0	0