Prime Access

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2011 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

During the year covered by the 2011 Gay Press Report – May 2010 through April 2011 – the pace of GLBT advances began to accelerate, but not without fits and starts.

This timeframe saw considerable action in four areas of importance to the GLBT community – marriage equality, anti-gay bullying, the midterm elections and Don't Ask, Don't Tell (DADT). Here we trace developments taking place in each of these realms between May 2010 and April 2011.

Marriage Equality

In August 2010, a judge struck down California's Proposition 8, calling it unconstitutional, but a higher court stayed that ruling, and as of this writing the issue continues to make its way through the courts.

In the months leading up to the midterm elections, most states shied away from advancing any legislation that would solidify gay and lesbian relationships. Thus by December, things stood exactly as they had in May – marriage equality was the law in five states: Connecticut, Iowa, Massachusetts, New Hampshire and Vermont (as well as in Washington, DC). And five other states – California, Nevada, New Jersey, Oregon and Washington – permitted committed couples to form civil unions in some states and domestic partnerships in others.

Things began to heat up in early January 2011. Illinois legalized civil unions (to begin June 1), and in February, Hawaii also enacted such a law (to become effective January 1, 2012). March, however, saw both Maryland and Colorado defeated in attempts to institute civil unions. (Later, beyond the time frame of this report, Delaware enacted a law supporting civil unions, and New York became the sixth state to legalize same-sex marriage.)

January also began the run-up to New York's decision to change its marriage laws. New Yorkers for Marriage Equality began broadcasting individual videos featuring well-known New Yorkers declaring their support for gay marriage, including Mayor Michael Bloomberg, Senators Chuck Schumer and Kirsten Gillibrand, and celebrities like Whoopi Goldberg, Russell Simmons, Mario Batali, Joan Rivers and Barbara Bush.

Meanwhile, poll results demonstrated that public attitudes toward same-sex marriage were changing. In August 2010 – for the first time – a CNN/Opinion Research Corp. (ORC) poll found a majority (52%) of the public declaring that gays and lesbians should have a constitutional right to marry. Subsequent surveys in 2011 indicate this was not a fluke: in March 2011, an ABC News/Washington Post poll revealed that 53% believe same-sex marriage should be legal (up from 47% a year ago). In April, a CNN/ORC poll reported that 51% assert same-sex marriages should be considered valid, with the same rights as traditional marriages. (And in early May [just beyond the timeframe of this report], Gallup found that 53% think same-sex marriage should be recognized by the law as valid [up from 44% a year ago].)

Anti-Gay Bullying

During a four-week period beginning in September 2010, five teenagers committed suicide, all of whom had been bullied by schoolmates for being gay. The most widely publicized case was that of a Rutgers University freshman whose roommate videoed him kissing a man in the privacy of his dorm room and put it on the Internet. As a result, the freshman jumped off the George Washington Bridge. Soon afterwards, President Obama, Secretary of State Hillary Clinton and Secretary of Education Arne Duncan expressed concern and denounced all forms of bullying. Gay activist Dan Savage then organized "It Gets Better," an Internet-based campaign aimed at preventing suicide among GLBT youth by having gay and lesbian adults convey the message that things get better as you grow older. During the first week, over 200 videos were uploaded, and now the trove includes more than 22,000 entries from people of all sexual orientations, including many celebrities. Then in January 2011, Governor Chris Christie of New Jersey signed into law the nation's toughest statute against bullying.

The Mid-Term Elections

In the November 2010 mid-term elections, the Republicans took control of the House of Representatives (meanwhile, the Senate remained in Democratic hands). In addition, David Cicilline, the openly gay mayor of Providence, RI, won election to the House, bringing to four the number of openly gay and lesbian members of Congress – all Democrats and all in the House – Tammy Baldwin of Wisconsin, Barney Frank of Massachusetts and Jared Polis of Colorado. Meanwhile, a transgender trial judge was elected to California's Superior Court, and in a reversion, three Iowa Supreme Court judges (among the seven who ruled in 2009 that Iowa's ban on gay marriage was unconstitutional) lost their seats. (Right-wing out-of-state forces had sought to punish them.)

Don't Ask, Don't Tell (DADT)

"Don't Ask, Don't Tell" (DADT), the Clinton-era policy that barred gay and lesbian service members from serving openly in the military, got a lot of attention during this time. While President Obama had advocated repeal of this law during this 2008 election campaign and emphasized his intent to do so during his 2010 State of the Union Address, he indicated he wanted repeal to come about through congressional action (rather than by executive directive). That action began in May 2010, when the House of Representatives voted to advance the repeal of DADT.

In September, federal Judge Virginia Phillips ruled that DADT is unconstitutional, as it violates the first amendment. Shortly afterward, the Department of Justice (DOJ) filed a brief asking the judge not to issue an injunction against enforcement, and Senator John McCain led a filibuster in the Senate, successfully blocking consideration of the House's earlier measure.

In October, however, Judge Phillips issued an injunction prohibiting the Department of Defense from enforcing DADT. In response, the DOJ filed an appeal and a request for a stay, but Judge Phillips denied that request, and military recruiters were told they could accept openly gay applicants. To prevent droves of gays and lesbians from applying to serve, President Obama requested an emergency stay. In response, a federal appeals court granted a temporary stay. Then in early November, the Ninth Circuit Court of Appeals stayed Judge Phillips' injunction, pending appeal, and the Supreme Court declined to intervene.

Later in November, the Pentagon released a comprehensive report demonstrating that ending the gay ban would have little or no effect on military functioning or morale. Fearing that the courts might force sudden change on a military that was not yet ready, Secretary of Defense Robert Gates encouraged Congress to act quickly to repeal DADT so that the military could prepare and adjust. Hearings were held in early December. After another filibuster in the Senate, a new bill covering policy matters was drafted. This passed the House quickly and was passed by the Senate just three days later. On December 22, President Obama signed the repeal of DADT into law. The final end to the ban was to come after a "certification process," followed by a 60-day waiting period. In March 2011, the army began moving forward with training, and the policy officially ended on September 20, 2011 (beyond the timespan of this report).

BACKGROUND AND METHODOLOGY

Background

For eighteen years now, the Gay Press Report has documented the frequency and content of advertising in the gay and lesbian press, the only entity to take that responsibility.

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

Thus the Gay Press Report is both an archive of historical data as well as an analysis of what has happened in GLBT advertising during the past year. As such, it serves as an indispensible resource for advertisers, publishers and other parties who are interested in and want to better understand and more effectively engage the interest of gay and lesbian consumers.

While it is difficult to pinpoint the exact size of the GLBT community, research indicates that between 6-7% of adults identify themselves as gay, lesbian, bisexual or transgender (approximately 16 million people).

Whatever its magnitude, there is no question that this segment skews both affluent and influential. In 2011, its buying power was expected to top $845 billion. In addition, many of its number are early adopters – 26% of gays and lesbians claim to be the first to know about new products and services (compared to 18% of the general population). And they are influencers – 60% say others often ask them for advice (vs. 34% of the public). But while GLBT consumers are vital contributors to the economy and society, they are often overlooked when it comes to advertising.

Like all consumers, gays and lesbians gravitate toward products and brands that advertise directly to them. Recent studies have shown that they tend to seek out companies and products that reflect their concerns, and are much more likely to remain loyal to these advertisers than their straight counterparts. As a result, smart marketers choose to make them a priority.

METHODOLOGY

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

As might be expected, the scope of the gay and lesbian press changes from year to year. While some publications have been around for years, others disappear and new ones arrive on the scene. Each year, however, we make every attempt to gather the totality of what has been published 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 typical of what happens in advertising during most other months. Thus we use figures from April to portray all that has transpired in the twelve months since our previous report (May 2010 to April 2011).

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. Thus for the 2011 report, we began gathering publications dated the first Friday (April 1), and stopped collecting them four weeks and one day later, on the fifth Friday (April 29). Using this 29-day time period insures methodological consistency from one year to the next, and allows us to make apple-to-apple comparisons.

For the 2011 Gay Press Report, we assembled and examined a total of 179 publications (composed of 109 individual titles), the entirety of the gay and lesbian press published in April 2011.

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 explicit 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 at hand.

Caveat

This methodology is judicious and generally works well for us. While preparing the 2010 report, however, we became aware that under extraordinary circumstances, an issue can arise from using the data from one month to represent that of an entire year. Here the exceptional occurrence was the financial crisis – its timing in particular, and the fact that it hit the publishing industry (including the GLBT Press) especially hard.

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 ad spending number for 2008 was based on April 2008, and showed a 31.2% gain over

2007. Meanwhile, the comparable figure for Consumer Magazines (covering all revenue from 2008), indicated a loss of 8.0%, hinting at the downturn to come. (See page 1 of Appendix.)

In our 2009 report, we demonstrated an increase of 13.6% (again, based on April of that year). But Consumer Magazines recorded a decline of 16.8%. As might be expected, we were buoyed by our gain, but things weren't what they seemed. Since our 2009 number had been the result as of April, it did not capture the full impact of what would occur during the remainder of 2009.

The CNBC program *Market Watch* reported that beginning in 2009 and continuing through the first quarter of 2010, spending for newspaper print advertising saw double-digit declines for five straight quarters. In addition, the *New York Times* said 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.

Revenues began to improve during the second quarter of 2010, however, and by the end of 2010, things looked more promising.

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

Now it appears that our April 2011 data is back on track, having captured most of the improvements versus a year ago, good news that we are hoping will continue in the months to come.

EXECUTIVE SUMMARY

- According to most sources, the recovery from the recent economic crisis began in the second quarter of 2010. While this is captured in the figures for Consumer Magazines (registering an uptick of 1.0% in 2010, and an even greater improvement – 3.3% – in 2011), figures for the GLBT Press appear to show a different story. In 2010, GLBT revenues plummeted to $153.9 million, a breathtaking decline of 56.0%, and then rebounded to $307.0 million in 2011, a recovery of 99.5%.

    - Why are these trajectories so different? While Consumer Magazines bases its revenues on an entire year, the GLBT Press estimates its year-end revenues based on what happens in April (see methodology section). As most of the recovery took place after April, GLBT figures in 2010 were much worse than they might have been.

- Despite uneven results, growth in the gay and lesbian press continues to outpace growth in Consumer Magazines, as GLBT ad revenues have grown 319% since 1996 (the comparable figure for Consumer Magazines is 25%). This translates into compound annual growth rates (CAGR) of 10.0% and 1.5% respectively, demonstrating that from 1996 to 2011, ad revenues in the gay and lesbian press grew more than six times faster than that of Consumer Magazines.

- 179 issues in April (springing from 109 individual titles), represent the totality of the gay and lesbian press in 2011. Although the number of issues is down (30 fewer, a loss of 14.4%), the number of titles remains the same as in 2010.

- Meanwhile, the combined circulation of all GLBT publications is 2,236,050, up 5.3%. Recovery is evident for national magazines, which demonstrates a 77.7% gain in readership. Local magazines are also up, by 18.7%. (But both A&E guides and local newspapers have significant losses – 27.3% and 30.6%, respectively.)

    - The figures above illustrate the consequences of the financial crisis, as several publishers (particularly those of local newspapers and A&E guides) decided to curtail frequency, thereby reducing numbers of issues as well as circulation.

- In 2011 there were 17,591 ads in the GLBT press, a respectable increase of 7.1%. Local newspapers account for 44.7%, local magazines capture 30.5%, and A&E guides obtain 22.1%. In turn, national magazines receive only 2.7%.

- The *percentage* of gay-specific ads in the GLBT press (ads that directly refer to gay and lesbian lifestyles through graphics and/or text) is 68.1%, a slight decrease from 2010's record high of 72.4%. This decline of 5.9% notwithstanding, use of gay-specific advertising remains at near record levels and continues to be a best practice. For perspective, use of gay-specific advertising just four years ago (2008) was only 49.4%.

- The *largest percent* of gay specific ads is found in A&E guides (90.1%). National magazines and local magazines have far fewer (72.8% and 71.1%, respectively) but still account for higher proportions than local newspapers (where 54.9% of ads are gay-specific).

    ◦ Concurrently, the *number* of gay-specific ads in each type of publication is up, with the single exception of local newspapers (down 34.8%). Thus once again we find evidence that local newspapers have had the most difficulty weathering the financial downturn.

DETAILED FINDINGS

1. Advertising Spending in the Gay and Lesbian Press

2011 figures confirm that advertising spending is definitely on an upswing after surviving the worst of the recent financial crisis.

During the difficult times, many GLBT titles ceased circulation. Others re-organized, trying to cut costs while retaining their focus. Some adopted a strategy of publishing less often, and others deliberately reduced circulation (doing away with free copies, etc.).

While the rebound began in the second quarter of 2010, our 2010 numbers do not reflect this since they were based on results from April 2010, right before the recovery began in earnest.

As discussed at length 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, and used to approximate yearly numbers. In contrast, numbers for Consumer Magazines are based on the year as a whole. (See Methodology section for a full explanation.)

Meanwhile, results from April 2011 appear to capture the impact of the upturn. Revenues for the GLBT press are now at $307 million, up 99.5% versus a year ago (representing the lowest point in twelve years). In comparison, revenues for Consumer Magazines are at $11,283 million, up 3.3% over 2010.

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

It is clear that advertising spending in Consumer Magazines is far greater than that in the gay and lesbian press. But – as shown by two different measures – the growth of advertising spending in the GLBT Press far outstrips that of Consumer Magazines:

(1) From 1996 to 2011, revenue for the gay and lesbian press has increased by 319%; comparable earnings for Consumer Magazines have gained a much smaller 25%.

(2) In addition, a calculation of compound annual growth rates (CAGR) over the same time period demonstrates that spending for the gay and lesbian press has risen more than six times faster than revenues for Consumer Magazines (achieving a CAGR of 10.0% versus that of 1.5% for Consumer Magazines).

2. Composition and Size of the Gay and Lesbian Press

Number of Issues, Individual Titles

As discussed above, each year we collect all gay and lesbian publications issued in a 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 therein.

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

As of April 2011, the GLBT Press consists of 179 issues, representing 109 individual titles. Compared to 2010, there are 30 fewer issues (a loss of 14.4%) but the same number of titles.

Looking closely at the number of issues, we find that local magazines have increased by four, advancing 7.1%, and national magazines have grown from five to twelve, a welcome improvement of 140.0%. At the same time, local newspapers have declined from 117 to 84 issues, a loss of 28.2%, and A&E guides have fallen from 31 to 23, down 25.8%.

For most of the latter publications, the decrease in the number of issues was the result of an executive decision, as the number of titles has remained the same. Several publishers chose to publish bimonthly rather than weekly, thus reducing their number of issues as well as their circulation.

Circulation

In an encouraging sign, the combined circulation of all gay and lesbian publications now stands at 2,236,050, up 5.3% from a year ago. National magazines are responsible for the biggest gain, an increase of 77.7%. In addition, circulation of local magazines has grown by 18.7%.

Meanwhile, circulation for local A&E guides has dropped 27.3%, and local newspapers have tumbled 30.6%, reflecting the consequences of choosing to publish less frequently.

3. Advertising Activity in the Gay and Lesbian Press

Distribution of Ads

As in previous years, the bulk of GLBT advertising – 97.3% – is concentrated in local publications. Local newspapers account for most (44.7%), followed by local magazines (which capture 30.5%) and local A&E guides (which pick up 22.1% of ads). National magazines obtain only 2.7%.

Growth in Ads

The number of ads in the gay and lesbian press now stands at 17,591, a respectable gain of 7.1% since 2010.

Meanwhile, placements in national magazines have increased by an impressive 129.0% (expanding from 207 to 474). (This corresponds to the fact that the number of issues in national magazines more than doubled, rising from five to twelve, a gain of 140.0%; see previous page.) In addition, ads in local magazines advanced by a remarkable 62.9%, and those in local A&E guides gained an impressive 37.4% (despite the number of issues falling by 25.8%).

At the same time, the number of ads in local newspapers fell 22.1% (declining from 10,086 to 7,858), also reflecting a drop in the number of issues (down 28.2%).

Advertisers apparently made the decision to invest more heavily in local A&E guides, despite their having fewer issues. Advertisers also increased their presence in local magazines, and chose national magazines over local newspapers (many of which curtailed publication and reduced their circulation).

Number of Ad Pages

Similar patterns are seen for the number of ad pages, which is not surprising, given that this measure usually correlates with the number of ads.

Ad pages are up 18.5% overall, reflecting major increases in three types of publications – national magazines (advancing an astounding 186.6%), local magazines (gaining an impressive 62.5%), and local A&E guides (going up a notable 40.6%). And reflecting results discussed above, ad pages in local newspapers have declined by 12.0%.

There is also a significant decrease in the ratio of individual ads to ad pages. In 2011, we count an average of 1.36 ads per ad page, compared to 1.51 in 2010. (In previous years, ratios were similar to that in 2010 – 1.56 in 2009; 1.49 in 2008; 1.51 in 2007; and 1.50 in 2006.) Despite the fact that in 2011 there are fewer ads per ad page, revenues are up, meaning that the ads on each page are larger and cost more.

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

Distribution of Ads

Year after year, the category Eat and Drink (composed of Bars & Clubs and Restaurants) captures the largest number of GLBT ads. In 2011, this broad-based product category accounts for 19.7% of ads (up 19.1% over 2010). In second place is Services/Non-Medical (12.9%), described as ads that are larger than business cards and placed by lawyers and accountants (but not doctors) (down 20.9% versus a year ago). And, in a huge change, Retail is third (9.1%, up 46.4%), replacing Professional Services (which has fallen to sixth place). Retail has never before been in the top three (it was eighth five years ago, and rose to fifth just last year). (Advertisers apparently think that because the economy has improved, consumers will be buying more goods.)

Meanwhile, Arts & Entertainment is in fourth place (7.6%), and Phone Services/Personals is fifth (6.2%). As mentioned above, Professional Services/small space ads, which are about the size of a business card and advertise services offered by doctors, lawyers and accountants, is now sixth (6.1%), after having been either second or third in the past few years.

Health/Fitness/Grooming (5.9%) is seventh, followed by Medical/Health-Related (5.8%). Travel (4.8%) is ninth and Real Estate (3.9%) tenth. (From 2004-2007, Real Estate was among the top three categories, but fell to seventh in 2008, eighth in 2009, ninth in 2010 and is now tenth.)

Growth of Ads

After suffering disappointing results in early 2010 (just before recovery in the ad industry began to take off), twelve of the eighteen broad-based product categories appear to have rebounded, achieving significant increases versus a year ago. The most remarkable turnaround is that of Beverage/Alcohol, which has increased by an exceptional 235.8%.

Still impressive, but at a considerable distance, are results for Automotive (up 54.1%), Classifieds (49.1%), Retail (46.4%) and Events (46.2%). Gains in other product categories are also noteworthy – Fashion & Accessories (up 37.7%), Medical/Health-Related (30.6%), Gay-Oriented Media (25.7%), Eat and Drink (19.1%), Phone Services/ Personals (18.2%), Financial Services (13.4%) and Health/Fitness/Grooming (10.0%).

At the same time, we find significant decreases. Home is down 10.9%, Real Estate has declined 12.5%, Services/Non-Medical has fallen 20.9%, and Professional Services has dropped by 39.3%.

5. Line Item Product Categories Represented in the Gay and Lesbian Press

(includes broad-based product categories with no subcategories)

Looking at the distribution of individual line items within broad-based product categories, we identify the top ten as:

Bars & Clubs (composing 15.0% of all ads, up 26.7% since 2010). This category is a mainstay of GLBT advertising, having been among the top three since 2002. Bars & Clubs caters to gay and gay-friendly consumers and often features special attractions like karaoke, theme nights and/or floor shows. Along with Restaurants (see below), it is a subcategory of Eat and Drink, the largest broad-based product category (claiming 19.7% of all ads). But while Bars & Clubs has increased 26.7% in the past year, Restaurants is up only 0.1%, reflecting the ongoing fallout from the financial meltdown, especially with regard to how consumers are choosing to spend discretionary income.

Services/Non-Medical (12.9% of all ads, down 20.9%). Services/Non-Medical is a broad-based product category featuring ads for services provided by lawyers, accountants and other professionals, but not doctors. While similar to Professional Services (see below), ads in this category tend to be larger in size. Since 2004, Services/Non-Medical has included ads from businesses offering a variety of wedding services.

Retail Products & Services (8.4%, up 42.5%). This is the first time that Retail Products & Services has been among the top three line items. As a subcategory of Retail, it covers ads for all retail products with the exception of those promoting fashion/clothing, home décor and electronics. (Retail accounts for 9.1% of all GLBT ads.)

Phone Services/Personals (6.2%, up 18.2%). While this broad-based product category is in fourth place (one notch higher than in 2010), it is slowly migrating toward the Web (along with Classifieds). Ads in this category present traditional personals like "GWF, 30-ish. Looking for a long-term relationship, adores dogs and admires everything about Lady Gaga," as well as ads for chat lines, escort services and special massage.

Professional Services (small space ads 6.1%, down 39.3%). This broad-based product category has been in the top three since 2008 but is now in fifth place. Professional Services ads look very much like business cards in terms of size and content, and promote services by professionals, including lawyers, accountants and counselors. Some of these ads declare that the advertiser runs a gay-owned and operated business, or is gay-friendly.

Theater/Dance (5.0% of all ads, up 28.3% since 2010). Theater/Dance has always been among the top ten, except for a brief absence in 2006. Here it is in sixth place. Theater/Dance informs consumers about Broadway productions and local and regional theaters, some of which have gay-themed shows. (This item is a subcategory of Arts & Entertainment, representing 7.6% of all ads in the GLBT press.)

Restaurants (4.7%, up 0.1%). This line item also usually makes the top ten and, as noted above, is a subcategory of Eat and Drink (totaling 19.7% of all ads), along with Bars & Clubs. Ads in this category are for local gay-owned or gay-friendly "sit-down" restaurants, and do not include chains or fast-food establishments. As discussed above, ads for Restaurants have been more seriously impacted by the economy than have ads for Bars & Clubs.

Fitness/Health (4.7%, down 5.1%). Over the past few years, Fitness/Health appears to have taken a big hit and continues to decline in both number and percentage of ads. These ads tout local gyms and health clubs, as well as other businesses advocating healthy lifestyles. (Fitness/Health is the largest subcategory of Health/Fitness/Grooming, which is responsible for 5.9% of all ads.)

Real Estate (3.9%, down 12.5%). Real Estate is now in ninth place, at its lowest level in nine years (after attaining first place in 2006, then falling to third in 2007, to fifth in 2008, to seventh in 2009, to eighth in 2010 and now landing at ninth, mirroring the meteoric rise and fall of the housing market). Gays and lesbians, like most people, want to find homes and condos for rent or sale in desirable areas. They also like to live in gay-friendly communities and respond well to ads that are targeted directly to them. (Real Estate is a broad-based product category with no subcategories.)

Hotels/Resorts (2.7%, up 14.4%). In tenth place is Hotels/Resorts, presenting ads that spotlight the attributes and amenities of various hotels/resorts, inns and bed-and-breakfasts. It is a subcategory of Travel, which accounts for 4.8% of all ads.

6. Changes in Line Item Product Categories Since 2010

In a sure sign of better times since 2010, thirty of the 53 line items in the GLBT press demonstrate significant gains in regard to number of ads. The most spectacular results are for Recruiting/Jobs (up 563.6%), Rental Cars (up 500.0%), Pharmaceuticals (up 484.6%) and Hair Growth (up 400%).

However impressive, two of these line items began with a small number of ads. For example, while Rental Cars clocked a 500% gain, it grew from four ads in 2010 to just 24 in 2011, still a small number. In addition, the 400% increase for Hair Growth also rose from a four-ad beginning, reaching 20 in 2011.

We should thus be selective in reporting these results. We therefore will reference only those line items that either started with or grew/declined by at least 100 ads. (A full record of changes to line items can be found on pages 30 and 31 of the Appendix.)

Using this guideline, we find that the most astonishing gains are for Recruiting/ Jobs (up 563.6%), Pharmaceuticals (up 484.6%), Liquor/Non-Beer (255.9%), Automobile Dealers (171.9%) and Cosmetics (153.6%).

Meanwhile, other impressive advances are noted for AIDS Events/Fundraisers (up 73.0%), Fashion/Clothing (69.1%), Gay Magazines (66.0%), Travel Agents (44.1%) and Retail Products & Services (42.5%).

Additional improvements are observed for Pets & Vets (up 29.7%), Medical–Non-HIV (28.4%), Theater/Dance (28.3%), Bars & Clubs (26.7%), Church (17.2%), Hotels/Resorts (14.4%), Insurance (12.5%) and Gay Events/Meetings (10.7%).

Meanwhile, twelve line items have remained much the same as they were in 2010 (recording no more than a 9.9% gain or loss in number of ads). Again, using our rule of 100, the more important of these items are Automobile Manufacturers (up 5.8%), Gay Internet Sites (up 4.9%), Restaurants (up 0.1%) and Fitness/Health (down 5.1%).

At the same time, eleven line items register significant decreases. The largest of these is Medical–HIV (declining by 11.5%), Home Furnishings/Décor (losing 14.6%), Movies/Video (dropping 38.8%) and Destinations (falling a disappointing 51.1%).

7. Ads With Specific Gay and Lesbian Content

Percentage of Gay-Specific Ads by Type of Publication

Gay-specific ads are those that directly address gay and lesbian consumers and/or their lifestyles. This is accomplished by featuring messages and/or graphics that make it absolutely clear that these ads have been created for GLBT consumers. Here we take a closer look at these ads.

During the past decade, advertisers have become increasingly confident about developing and placing gay-specific ads. Just nine years ago – in 2002 – only 9.9% of all GLBT ads were gay-specific. In 2003 the percent was 15.1%, and in 2004 – the year Massachusetts initiated marriage equality – it jumped to 44.1%. By 2005, a slight majority (50.3%) were gay-specific. In 2006, that proportion fell slightly to 48.6% but rebounded to 52.2% in 2007. By 2008, it advanced to 57.4%, in 2009 it rose to 61.9%, and in 2010 it attained an impressive 72.4%.

In 2011, however, the *percentage* of gay-specific ads has declined to 68.1%, a loss of 5.9%. In contrast, the *number* of gay-specific ads has increased, albeit slightly, to 0.8%. The former category in all likelihood is due to the economy, as advertisers probably tried to save money by using one ad to advertise their products across all consumer publications, rather than two – one for straight consumers and the other for gay and lesbian consumers.

Looking at types of publications, we find that local A&E guides now have the largest proportion of such ads (90.1% of all ads in A&E guides are gay-specific). Last year, national magazines boasted the largest percentage, but in 2011 that category is second, at 72.8%. The next largest proportion appears in local magazines (71.1%), followed by local newspapers (54.9%).

The only medium that gained in *percentage* of gay-specific ads is local A&E guides, up 3.8%. Losses are seen for local magazines (down 11.0%), local newspapers (dropping 16.2%), and national magazines (falling 20.3%). Overall, GLBT publications are down 5.9% in *percentage* of gay-specific ads.

Number of Gay-Specific Ads by Type of Publication

Reviewing the distribution of gay-specific ads, we discover that all publications line up exactly the same as they did in 2010 – the largest *number* of these ads appear in local newspapers (36.0% of all gay-specific ads), followed by local magazines (accounting for 31.9%) and local A&E guides (containing 29.2%). Only 2.9% of gay-specific ads appear in national magazines.

Since 2010, the overall *number* of gay-specific ads has increased by only 0.8%. Meanwhile, large gains are recorded in three of the four types of publications. The largest increment is found in national magazines (up a surprising 82.5%), while other impressive gains are noted in local magazines (up 44.9%) and local A&E guides (up 42.7%).

Meanwhile, the *number* of gay-specific ads in local newspapers is down a discouraging 34.8%, again reflecting the finding that since 2010, the overall number of issues of local magazines has declined significantly.

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

Distribution of Ads

Once again, the *percent* of gay-specific ads in the GLBT press stands at 68.1%, down 5.9% since 2010. At the same time, eleven of the eighteen broad-based product categories are represented by ads in which the majority are explicitly gay (down from fourteen a year ago).

For several years, the leading category in this regard has been Phone Services/ Personals. In 2011, 99.4% of all Phone Services/Personals ads in the GLBT press are gay-specific (down slightly from the 100% seen in 2010). Other categories where at least three-quarters of the ads are gay-specific include: Gay-Oriented Media (in which 96.9% of the ads are gay-specific), Classifieds (94.8%), Travel (93.9%), Eat and Drink (87.8%), Events (84.7%) and Health/Fitness/Grooming (81.9%). (See Appendix for complete listing.)

Classifications with the smallest percentages of gay-specific ads are Home (21.5%) and Automotive (24.8%), both of which have been at (or near) the bottom for a very long time.

Growth/Decline in Percentage of Ads

Since 2010, however, two categories show significant growth in *percentage* of gay-specific ads. Although numbers are small, these results represent a real turnaround for both industries. We mentioned earlier that Automotive has been at the bottom for years in terms of its percentage of gay-specific ads; in 2011, however, that percentage has jumped a startling 31.2%, bounding from 37 ads in 2010 to 75 in 2011. The other success story is Beverage/Alcohol, which has also hovered near the bottom. Despite this, Beverage/Alcohol has risen from 16 ads to 77 in the past year, accounting for a stunning gain of 43.4%.

Meanwhile, twelve of the eighteen categories register decreases in percentage of gay-specific ads, seven of which are significant (varying by more than 10%). For example, Events demonstrates an 11.2% decline, and Professional Services (small space ads) reveals a decrease of 12.8%. In addition, Services/Non-Medical chalks up a 14.1% loss.

More serious downturns are noted for Financial Services (down 35.9%), Medical/ Health-Related and Home (both declining 38.7%), and Real Estate (dropping a disturbing 47.1%).

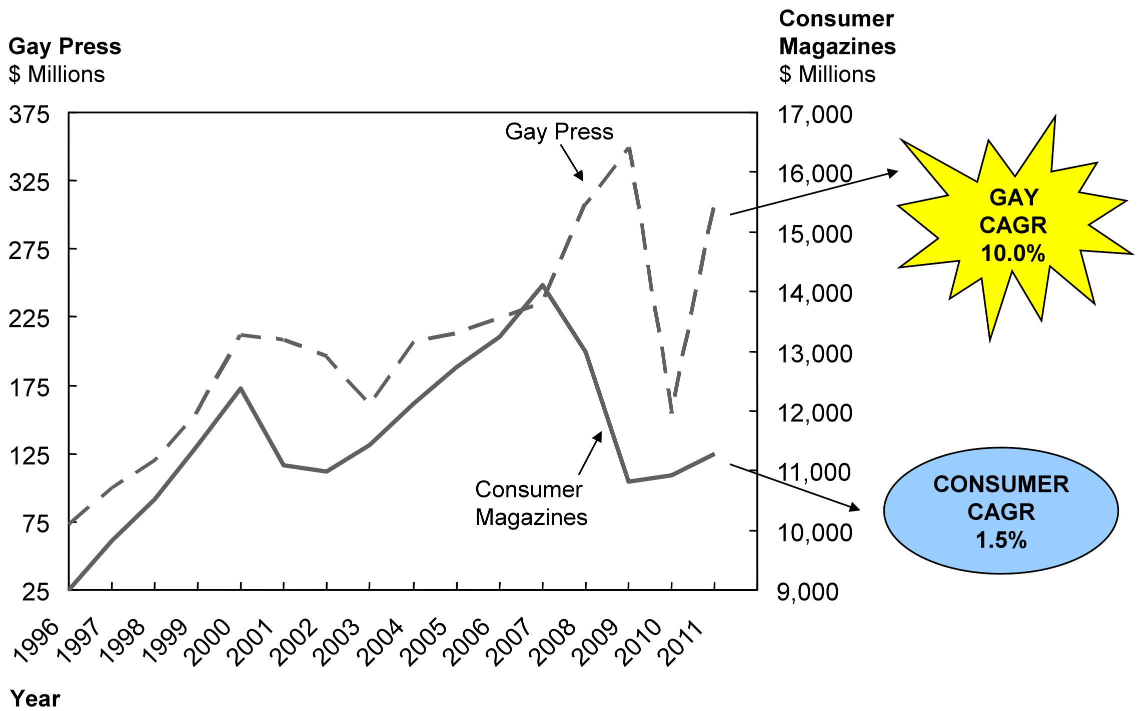
APPENDIX

2011 GAY PRESS REPORT

ADVERTISING SPENDING				
	Gay Press		Consumer Magazines	
Year	**$ 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	13,239.0	4.0
2007	234.6	5.1	14,117.0	6.6
2008	307.7	31.2	12,986.0	-8.0
2009	349.6	13.6	10,810.0	-16.8
2010	153.9	-56.0	10,922.0	1.0
2011	307.0	99.5	11,283.0	3.3

Source: Consumer magazine numbers are from Veronis Suhler Stevenson, as featured in its publication, *VSS Communications Industry Forecast, 2011-2015*. All numbers represent actual expenditures except for 2011, which is a projection.

GROWTH IN AD SPENDING – GAY PRESS VS. CONSUMER MAGAZINES
(Compound Annual Growth Rate 1996-2011)



Number of Issues Analyzed by Type of Publication					
	2010		**2011**		**Change %**
	#	**%**	**#**	**%**	**2010-2011**
Total Issues Analyzed	**209**	**100.0**	**179**	**100.0**	**-14.4**
Local Newspapers	117	56.0	84	46.9	-28.2
Local Magazines	56	26.8	60	33.5	7.1
Local A&E Guides	31	14.8	23	12.9	-25.8
National Magazines	5	2.4	12	6.7	140.0

Circulation by Type of Publication					
	2010		**2011**		**Change %**
	#	**%**	**#**	**%**	**2010-2010**
Total Circulation	**2,123,550**	**100.0**	**2,236,050**	**100.0**	**5.3**
Local Newspapers	813,400	38.3	564,900	25.2	-30.6
Local Magazines	749,150	35.3	889,500	39.8	18.7
Local A&E Guides	205,000	9.6	149,000	6.7	-27.3
National Magazines	356,000	16.8	632,650	28.3	77.7

Number of Ads by Type of Publication					
	2010		2011		Change % 2010-2011
	#	%	#	%	
Total Ads	**16,420**	**100.0**	**17,591**	**100.0**	**7.1**
Local Newspapers	10,086	61.4	7,858	44.7	-22.1
Local Magazines	3,301	20.1	5,376	30.5	62.9
Local A&E Guides	2,826	17.2	3,883	22.1	37.4
National Magazines	207	1.3	474	2.7	129.0

Number of Ad Pages by Type of Publication					
	2010		2011		Change % 2010-2011
	#	%	#	%	
Total Ad Pages	**10,887**	**100.0**	**12,899**	**100.0**	**18.5**
Local Newspapers	6,052	55.6	5,327	41.3	-12.0
Local Magazines	2,542	23.3	4,131	32.0	62.5
Local A&E Guides	2,144	19.7	3,014	23.4	40.6
National Magazines	149	1.4	427	3.3	186.6

Number of Ads by Category					
	2010		**2011**		**Change %**
	#	**%**	**#**	**%**	**2010-2011**
Total Number of Ads	**16,420**	**100.0**	**17,591**	**100.0**	**7.1**
Real Estate	**789**	**4.8**	**690**	**3.9**	**-12.5**
Financial Services	**314**	**1.9**	**356**	**2.0**	**13.4**
Viaticals	0	0	2	*	0
Mortgages	37	0.2	47	0.3	27.0
Banks	30	0.2	81	0.5	170.0
Insurance	144	0.9	162	0.9	12.5
Investments	101	0.6	61	0.3	-39.6
Credit Cards	2	*	3	*	50.0
Health/Fitness/Grooming	**941**	**5.7**	**1,035**	**5.9**	**10.0**
Fitness/Health	868	5.3	824	4.7	-5.1
Cosmetics	69	0.4	175	1.0	153.6
Hair Growth	4	*	20	0.1	400.0
Vitamins	0	0	16	0.1	0
Medical/Health-Related	**788**	**4.8**	**1,029**	**5.8**	**30.6**
Pharmaceuticals	39	0.2	228	1.3	484.6
Medical/HIV	288	1.8	255	1.4	-11.5
Medical/Non-HIV	412	2.5	529	3.0	28.4
Helplines	49	0.3	17	0.1	-65.3
Arts & Entertainment	**1,235**	**7.5**	**1,313**	**7.6**	**6.3**
Theater/Dance	682	4.2	875	5.0	28.3
Movies/Video	268	1.6	164	0.9	-38.8
Records/CDs/Concerts	116	0.7	80	0.5	-31.0
Books/Bookstores	56	0.3	57	0.3	1.8
Sports	68	0.4	44	0.3	-35.3
Comedy	8	0.1	18	0.1	125.0
TV/Cable	23	0.1	48	0.3	108.7
Radio	14	0.1	27	0.2	92.9
Travel	**831**	**5.1**	**862**	**4.8**	**3.7**
Hotels/Resorts	416	2.5	476	2.7	14.4
Destinations	274	1.7	134	0.8	-51.1
Travel Agents	127	0.8	183	1.0	44.1
Airlines	10	0.1	26	0.1	160.0
Rental Cars	4	*	24	0.1	500.0
Trains	0	0	19	0.1	0
Eat & Drink	**2,908**	**17.7**	**3,464**	**19.7**	**19.1**
Bars & Clubs	2,075	12.6	2,630	15.0	26.7
Restaurants	833	5.1	834	4.7	0.1

Number of Ads by Category (continued)					
	2010		2011		Change %
	#	%	#	%	2010-2011
Total Number of Ads	**16,420**	**100.0**	**17,591**	**100.0**	**7.1**
Events	**260**	**1.6**	**380**	**2.2**	**46.2**
Gay Events/Meetings	112	0.7	124	0.7	10.7
AIDS Events/Fundraisers	148	0.9	256	1.5	73.0
Retail	**1,091**	**6.7**	**1,597**	**9.1**	**46.4**
Retail Products & Services	1,035	6.3	1,475	8.4	42.5
Food & Markets	56	0.4	57	0.3	1.8
Electronics	0	0	65	0.4	0
Home	**276**	**1.7**	**246**	**1.4**	**-10.9**
Home Furnishings/Décor	192	1.2	164	0.9	-14.6
Florists/Nurseries	84	0.5	82	0.5	-2.4
Fashion & Accessories	**220**	**1.3**	**303**	**1.7**	**37.7**
Fashion/Clothing	139	0.8	235	1.3	69.1
Jewelry	81	0.5	68	0.4	-16.0
Beverage Alcohol	**53**	**0.3**	**178**	**1.0**	**235.8**
Liquor/Non-Beer	34	0.2	121	0.7	255.9
Beer	19	0.1	57	0.3	200.0
Gay-Oriented Media	**311**	**1.9**	**391**	**2.2**	**25.7**
Gay Magazines	106	0.6	176	1.0	66.0
Gay Internet Sites	205	1.3	215	1.2	4.9
Automotive	**196**	**1.2**	**302**	**1.7**	**54.1**
Dealers	57	0.4	155	0.9	171.9
Manufacturers	139	0.8	147	0.8	5.8
Professional Services (small space ads)	**1,778**	**10.8**	**1,080**	**6.1**	**-39.3**
Services/Non-Medical	**2,867**	**17.5**	**2,269**	**12.9**	**-20.9**
Phone Services/Personals	**916**	**5.6**	**1,083**	**6.2**	**18.2**
Classifieds	**232**	**1.4**	**346**	**2.0**	**49.1**
Other	**414**	**2.5**	**667**	**3.8**	**61.1**
Recruiting/Jobs	22	0.1	146	0.8	563.6
Church	180	1.1	211	1.2	17.2
Pets & Vets	155	0.9	201	1.1	29.7
Funeral Services	14	0.1	12	0.1	-14.3
Tobacco	3	*	6	*	100.0
Politics	30	0.2	82	0.5	173.3
Long Distance/Cellular	10	0.1	9	0.1	-10.0
Magazines (non-gay)	0	0	0	0	0

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

Number of Ads by Category – Changes 2010-2011					
	2010		**2011**		**Change % 2010-2011**
	#	**%**	**#**	**%**	
Notable Increases					
Beverage/Alcohol	53	0.3	178	1.0	235.8
Automotive	196	1.2	302	1.7	54.1
Classifieds	232	1.4	346	2.0	49.1
Retail	1,091	6.7	1,597	9.1	46.4
Events	260	1.6	380	2.2	46.2
Fashion & Accessories	220	1.3	303	1.7	37.7
Medical/Health-Related	788	4.8	1,029	5.8	30.6
Gay-Oriented Media	311	1.9	391	2.2	25.7
Eat & Drink	2,908	17.7	3,464	19.7	19.1
Phone Services/Personals	916	5.6	1,083	6.2	18.2
Financial Services	314	1.9	356	2.0	13.4
Health/Fitness/Grooming	941	5.7	1,035	5.9	10.0
About the Same					
Arts & Entertainment	1,235	7.5	1,313	7.6	6.3
Travel	831	5.1	862	4.8	3.7
Notable Decreases					
Home	276	1.7	246	1.4	-10.9
Real Estate	789	4.8	690	3.9	-12.5
Services/Non-Medical	2,867	17.5	2,269	12.9	-20.9
Professional Services (small space ads)	1,778	10.8	1,080	6.1	-39.3

Number of Ads by Individual Items – Changes 2010-2011					
	2010		**2011**		**Change % 2010-2011**
	#	**%**	**#**	**%**	
Notable Increases					
Recruiting/Jobs	22	0.1	146	0.8	563.6
Rental Cars	4	*	24	0.1	500.0
Pharmaceuticals	39	0.2	228	1.3	484.6
Hair Growth	4	*	20	0.1	400.0
Liquor/Non-Beer	34	0.2	121	0.7	255.9
Beer	19	0.1	57	0.3	200.0
Politics	30	0.2	82	0.5	173.3
Automobile Dealers	57	0.4	155	0.9	171.9
Banks	30	0.2	81	0.5	170.0
Airlines	10	0.1	26	0.1	160.0
Cosmetics	69	0.4	175	1.0	153.6
Comedy	8	0.1	18	0.1	125.0
TV/Cable	23	0.1	48	0.3	108.7
Tobacco	3	*	6	*	100.0
Radio	14	0.1	27	0.2	92.9
AIDS Events/Fundraisers	148	0.9	256	1.5	73.0
Fashion/Clothing	139	0.8	235	1.3	69.1
Gay Magazines	106	0.6	176	1.0	66.0
Credit Cards	2	*	3	*	50.0
Travel Agents	127	0.8	183	1.0	44.1
Retail Products & Services	1,035	6.3	1,475	8.4	42.5
Pets & Vets	155	0.9	201	1.1	29.7
Medical/Non-HIV	412	2.5	529	3.0	28.4
Theater/Dance	682	4.2	875	5.0	28.3
Mortgages	37	0.2	47	0.3	27.0
Bars & Clubs	2,075	12.6	2,630	15.0	26.7
Church	180	1.1	211	1.2	17.2
Hotels/Resorts	416	2.5	476	2.7	14.4
Insurance	144	0.9	162	0.9	12.5
Gay Events/Meetings	112	0.7	124	0.7	10.7

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

Number of Ads by Individual Items – Changes 2010-2011					
	2010		2011		Change % 2010-2011
	#	%	#	%	
About the Same					
Automobile Manufacturers	139	0.8	147	0.8	5.8
Gay Internet Sites	205	1.3	215	1.2	4.9
Food & Markets	56	0.4	57	0.3	1.8
Books/Bookstores	56	0.3	57	0.3	1.8
Restaurants	833	5.1	834	4.7	0.1
Electronics	0	0	65	0.4	0
Trains	0	0	19	0.1	0
Vitamins	0	0	16	0.1	0
Viaticals	0	0	2	*	0
Magazines (non-gay)	0	0	0	0	0
Florists/Nurseries	84	0.5	82	0.5	-2.4
Fitness/Health	868	5.3	824	4.7	-5.1
Notable Decreases					
Long Distance/Cellular	10	0.1	9	0.1	-10.0
Medical/HIV	288	1.8	255	1.4	-11.5
Funeral Services	14	0.1	12	0.1	-14.3
Home Furnishings/Décor	192	1.2	164	0.9	-14.6
Jewelry	81	0.5	68	0.4	-16.0
Records/CDs/Concerts	116	0.7	80	0.5	-31.0
Sports	68	0.4	44	0.3	-35.3
Movies/Video	268	1.6	164	0.9	-38.8
Investments	101	0.6	61	0.3	-39.6
Destinations	274	1.7	134	0.8	-51.1
Helplines	49	0.3	17	0.1	-65.3

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

Number of Ads by Category by Type of Publication					
	2010		2011		Change %
	#	%	#	%	2010-2011
Local Newspapers	**10,086**	**100.0**	**7,858**	**100.0**	**-22.1**
Services/Non-Medical	2,196	21.8	1,438	18.3	-34.5
Professional Services (small space)	1,585	15.7	836	10.7	-47.3
Eat & Drink	1,155	11.4	818	10.4	-29.2
Arts & Entertainment	824	8.2	646	8.2	-21.6
Retail	717	7.1	623	7.9	-13.1
Medical/Health-Related	513	5.1	582	7.4	13.5
Real Estate	490	4.8	426	5.4	-13.1
Health/Fitness/Grooming	511	5.1	395	5.0	-22.7
Phone Services/Personals	392	3.9	332	4.2	-15.3
Travel	308	3.0	266	3.4	-13.6
Financial Services	219	2.2	196	2.5	-10.5
Automotive	159	1.6	193	2.5	21.4
Events	132	1.3	170	2.2	28.8
Gay-Oriented Media	141	1.4	165	2.1	17.0
Home	179	1.8	155	2.0	-13.4
Classifieds	133	1.3	103	1.3	-22.6
Fashion & Accessories	110	1.1	73	0.9	-33.6
Beverage/Alcohol	27	0.3	65	0.8	140.7
Other	295	2.9	376	4.8	27.5
Local Magazines	**3,301**	**100.0**	**5,376**	**100.0**	**62.9**
Eat & Drink	751	22.7	1,076	20.0	43.3
Services/Non-Medical	384	11.6	628	11.7	63.5
Retail	220	6.7	554	10.3	151.8
Arts & Entertainment	298	9.0	524	9.7	75.8
Phone Services/Personals	149	4.5	379	7.0	154.4
Health/Fitness/Grooming	256	7.8	326	6.1	27.3
Medical/Health-Related	134	4.1	251	4.7	87.3
Travel	261	7.9	209	3.9	-19.9
Professional Services (small space)	131	4.0	203	3.8	55.0
Real Estate	148	4.5	175	3.3	18.2
Events	118	3.6	144	2.7	22.0
Financial Services	71	2.1	143	2.7	101.4
Gay-Oriented Media	127	3.8	139	2.6	9.4
Fashion & Accessories	43	1.3	108	2.0	151.2
Classifieds	39	1.2	94	1.7	141.0
Home	64	1.9	65	1.2	1.6
Automotive	26	0.8	60	1.1	130.8
Beverage/Alcohol	12	0.4	60	1.1	400.0
Other	69	2.1	238	4.4	244.9

Number of Ads by Category by Type of Publication					
	2010		2011		Change %
	#	%	#	%	2010-2011
Local A&E Guides	**2,826**	**100.0**	**3,883**	**100.0**	**37.4**
Eat & Drink	980	34.7	1,518	39.1	54.9
Retail	147	5.2	374	9.6	154.4
Phone Services/Personals	375	13.3	350	9.0	-6.7
Travel	170	6.0	303	7.8	78.2
Health/Fitness/Grooming	169	6.0	299	7.7	76.9
Services/Non-Medical	282	10.0	186	4.8	-34.0
Medical/Health-Related	131	4.6	147	3.8	12.2
Classifieds	60	2.1	117	3.0	95.0
Arts & Entertainment	99	3.5	103	2.7	4.0
Fashion & Accessories	58	2.0	84	2.2	44.8
Real Estate	151	5.3	82	2.1	-45.7
Gay-Oriented Media	28	1.0	63	1.6	125.0
Events	10	0.4	59	1.5	490.0
Automotive	9	0.3	49	1.3	444.4
Beverage Alcohol	12	0.4	44	1.1	266.7
Professional Services (small space)	44	1.6	41	1.1	-6.8
Home	33	1.2	24	0.6	-27.3
Financial Services	20	0.7	5	0.1	-75.0
Other	48	1.7	35	0.9	-27.1
National Magazines	**207**	**100.0**	**474**	**100.0**	**129.0**
Travel	92	44.4	84	17.7	-8.7
Eat & Drink	22	10.6	52	11.0	136.4
Medical/Health-Related	10	4.8	49	10.3	390.0
Retail	7	3.4	46	9.7	557.1
Arts & Entertainment	14	6.8	40	8.4	185.7
Fashion & Accessories	9	4.4	38	8.0	322.2
Classifieds	0	0	32	6.8	0
Gay-Oriented Media	15	7.2	24	5.1	60.0
Phone Services/Personals	0	0	22	4.6	0
Services/Non-Medical	5	2.4	17	3.6	240.0
Health/Fitness/Grooming	5	2.4	15	3.2	200.0
Financial Services	4	1.9	12	2.5	200.0
Beverage Alcohol	2	1.0	9	1.9	350.0
Events	0	0	7	1.5	0
Real Estate	0	0	7	1.5	0
Home	0	0	2	0.4	0
Professional Services (small space)	18	8.7	0	0	-100.0
Automotive	2	1.0	0	0	-100.0
Other	2	1.0	18	3.8	800.0

Number of Ad Pages by Category					
	2010		2011		Change %
	#	%	#	%	2010-2011
Total Number of Pages	**10,887**	**100.0**	**12,899**	**100.0**	**18.5**
Real Estate	**523**	**4.8**	**496**	**3.8**	**-5.2**
Financial Services	**291**	**2.7**	**325**	**2.5**	**11.7**
Viaticals	0	0	2	*	0
Mortgages	37	0.3	47	0.4	27.0
Banks	27	0.3	81	0.6	200.0
Insurance	128	1.2	135	1.1	5.5
Investments	97	0.9	57	0.4	-41.2
Credit Cards	2	*	3	*	50.0
Health/Fitness/Grooming	**563**	**5.1**	**732**	**5.7**	**30.0**
Fitness/Health	490	4.5	525	4.1	7.1
Cosmetics	69	0.6	171	1.3	147.8
Hair Growth	4	*	20	0.2	400.0
Vitamins	0	0	16	0.1	0
Medical/Health-Related	**663**	**6.1**	**864**	**6.7**	**30.3**
Pharmaceuticals	39	0.4	213	1.7	446.2
Medical/HIV	194	1.8	220	1.7	13.4
Medical/Non-HIV	381	3.5	414	3.2	8.7
Helpline	49	0.4	17	0.1	-65.3
Arts & Entertainment	**1,032**	**9.5**	**1,098**	**8.5**	**6.4**
Theater/Dance	546	5.0	687	5.3	25.8
Movies/Video	210	1.9	156	1.2	-25.7
Records/CDs/Concerts	114	1.1	79	0.6	-30.7
Books/Bookstores	53	0.5	43	0.3	-18.9
Sports	64	0.6	40	0.3	-37.5
Comedy	8	0.1	18	0.2	125.0
TV/Cable	23	0.2	48	0.4	108.7
Radio	14	0.1	27	0.2	92.9
Travel	**661**	**6.1**	**720**	**5.6**	**8.9**
Hotels/Resorts	279	2.6	350	2.7	25.4
Destinations	259	2.4	134	1.0	-48.3
Travel Agents	109	1.0	172	1.3	57.8
Airlines	10	0.1	21	0.2	110.0
Rental Cars	4	*	24	0.2	500.0
Trains	0	0	19	0.2	0
Eat & Drink	**2,431**	**22.3**	**2,873**	**22.3**	**18.2**
Bars & Clubs	1,813	16.6	2,295	17.8	26.6
Restaurants	618	5.7	578	4.5	-6.5

Number of Ad Pages by Category (continued)					
	2010		2011		Change %
	#	%	#	%	2010-2011
Total Number of Pages	**10,887**	**100.0**	**12,899**	**100.0**	**18.5**
Events	**256**	**2.3**	**374**	**2.9**	**46.1**
Gay Events/Meetings	109	1.0	121	0.9	11.0
AIDS Events/Fundraisers	147	1.3	253	2.0	72.1
Retail	**901**	**8.3**	**1,451**	**11.3**	**61.0**
Retail Products & Services	845	7.8	1,334	10.4	57.9
Food & Markets	56	0.5	52	0.4	-7.1
Electronics	0	0	65	0.5	0
Home	**258**	**2.4**	**219**	**1.7**	**-15.1**
Home Furnishings/Décor	183	1.7	157	1.2	-14.2
Florists/Nurseries	75	0.7	62	0.5	-17.3
Fashion & Accessories	**173**	**1.6**	**290**	**2.2**	**67.6**
Fashion/Clothing	100	0.9	224	1.7	124.0
Jewelry	73	0.7	66	0.5	-9.6
Beverage Alcohol	**53**	**0.5**	**176**	**1.4**	**232.1**
Liquor/Non-Beer	34	0.3	119	0.9	250.0
Beer	19	0.2	57	0.5	200.0
Gay-Oriented Media	**269**	**2.5**	**370**	**2.9**	**37.5**
Gay Magazines	99	0.9	159	1.2	60.6
Gay Internet Sites	170	1.6	211	1.7	24.1
Automotive	**173**	**1.6**	**289**	**2.2**	**67.1**
Dealers	57	0.5	142	1.1	149.1
Manufacturers	116	1.1	147	1.1	26.7
Professional Services (small space ads)	**284**	**2.6**	**130**	**1.0**	**-54.2**
Services/Non-Medical	**1,479**	**13.6**	**1,378**	**10.7**	**-6.8**
Phone Services/Personals	**306**	**2.8**	**320**	**2.5**	**4.6**
Classifieds	**225**	**2.0**	**247**	**1.9**	**9.8**
Other	**346**	**3.2**	**547**	**4.2**	**58.1**
Recruiting/Jobs	22	0.2	126	1.0	472.7
Church	143	1.3	156	1.2	9.1
Pets & Vets	127	1.2	176	1.3	38.6
Funeral Services	14	0.1	12	0.1	-14.3
Tobacco	3	*	6	*	100.0
Politics	27	0.3	62	0.5	129.6
Long Distance/Cellular	10	0.1	9	0.1	-10.0
Magazines (non-gay)	0	0	0	0	0

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

Percentage of Gay-Specific Ads by Type of Publication					
	2010		**2011**		**Change % 2010-2011**
	#	**%**	**#**	**%**	
Total Gay-Specific Ads	**11,888**	**72.4**	**11,979**	**68.1**	**-5.9**
Local Newspapers	6,610	65.5	4,312	54.9	-16.2
Local Magazines	2,637	79.9	3,822	71.1	-11.0
Local A&E Guides	2,452	86.8	3,500	90.1	3.8
National Magazines	189	91.3	345	72.8	-20.3

Number of Gay-Specific Ads by Type of Publication					
	2010		**2011**		**Change % 2010-2011**
	#	**%**	**#**	**%**	
Total Gay-Specific Ads	**11,888**	**100.0**	**11,979**	**100.0**	**0.8**
Local Newspapers	6,610	55.6	4,312	36.0	-34.8
Local Magazines	2,637	22.2	3,822	31.9	44.9
Local A&E Guides	2,452	20.6	3,500	29.2	42.7
National Magazines	189	1.6	345	2.9	82.5

Number of Gay-Specific Ads by Category					
	2010		2011		Change %
	#	%	#	%	2010-2011
Total Number of Ads	**11,888**	**100.0**	**11,979**	**100.0**	**0.8**
Real Estate	**516**	**4.3**	**239**	**2.0**	**-53.7**
Financial Services	**191**	**1.6**	**139**	**1.2**	**-27.2**
Viaticals	0	0	0	0	0
Mortgages	20	0.2	26	0.2	30.0
Banks	20	0.2	26	0.2	30.0
Insurance	102	0.8	56	0.5	-45.1
Investments	49	0.4	30	0.3	-38.8
Credit Cards	0	0	1	*	0
Health/Fitness/Grooming	**805**	**6.8**	**848**	**7.1**	**5.3**
Fitness/Health	768	6.5	760	6.3	-1.0
Cosmetics	34	0.3	80	0.7	135.3
Hair Growth	3	*	0	0	-100.0
Vitamins	0	0	8	0.1	0
Medical/Health-Related	**472**	**4.0**	**378**	**3.2**	**-19.9**
Pharmaceuticals	27	0.2	44	0.4	63.0
Medical/HIV	235	2.0	172	1.4	-26.8
Medical/Non-HIV	162	1.4	145	1.2	-10.5
Helpline	48	0.4	17	0.2	-64.6
Arts & Entertainment	**886**	**7.5**	**961**	**8.0**	**8.5**
Theater/Dance	413	3.5	630	5.3	52.5
Movies/Video	268	2.2	151	1.3	-43.7
Records/CDs/Concerts	71	0.6	53	0.4	-25.4
Books/Bookstores	50	0.4	42	0.3	-16.0
Sports	60	0.5	42	0.3	-30.0
Comedy	8	0.1	18	0.2	125.0
TV/Cable	9	0.1	13	0.1	44.4
Radio	7	0.1	12	0.1	71.4
Travel	**809**	**6.8**	**809**	**6.8**	**0**
Hotels/Resorts	404	3.4	453	3.8	12.1
Destinations	272	2.3	132	1.1	-51.5
Travel Agents	124	1.0	171	1.4	37.9
Airlines	6	0.1	23	0.2	283.3
Rental Cars	3	*	11	0.1	266.7
Trains	0	0	19	0.2	0
Eat & Drink	**2,421**	**20.4**	**3,041**	**25.4**	**25.6**
Bars & Clubs	2,075	17.5	2,620	21.9	26.3
Restaurants	346	2.9	421	3.5	21.7

Number of Gay-Specific Ads by Category (continued)					
	2010		**2011**		**Change %**
	#	**%**	**#**	**%**	**2010-2011**
Total Number of Ads	**11,888**	**100.0**	**11,979**	**100.0**	**0.8**
Events	**248**	**2.1**	**322**	**2.7**	**29.8**
Gay Events/Meetings	111	0.9	108	0.9	-2.7
AIDS Events/Fundraisers	137	1.2	214	1.8	56.2
Retail	**544**	**4.6**	**843**	**7.0**	**55.0**
Retail Products & Services	524	4.4	764	6.4	45.8
Food & Markets	20	0.2	19	0.1	-5.0
Electronics	0	0	60	0.5	0
Home	**97**	**0.8**	**53**	**0.4**	**-45.4**
Home Furnishings/Décor	63	0.5	31	0.2	-50.8
Florists/Nurseries	34	0.3	22	0.2	-35.3
Fashion & Accessories	**111**	**0.9**	**165**	**1.4**	**48.6**
Fashion/Clothing	75	0.6	142	1.2	89.3
Jewelry	36	0.3	23	0.2	-36.1
Beverage Alcohol	**16**	**0.1**	**77**	**0.6**	**381.3**
Liquor/Non-Beer	4	*	39	0.3	875.0
Beer	12	0.1	38	0.3	216.7
Gay-Oriented Media	**308**	**2.6**	**379**	**3.2**	**23.1**
Gay Magazines	106	0.9	176	1.5	66.0
Gay Internet Sites	202	1.7	203	1.7	0.5
Automotive	**37**	**0.3**	**75**	**0.6**	**102.7**
Dealers	25	0.2	43	0.3	72.0
Manufacturers	12	0.1	32	0.3	166.7
Professional Services (small space ads)	**1,398**	**11.8**	**740**	**6.2**	**-47.1**
Services/Non-Medical	**1,667**	**14.0**	**1,132**	**9.4**	**-32.1**
Phone Services/Personals	**916**	**7.7**	**1,076**	**9.0**	**17.5**
Classifieds	**227**	**1.9**	**328**	**2.7**	**44.5**
Other	**219**	**1.8**	**374**	**3.1**	**70.8**
Recruiting/Jobs	21	0.2	108	0.9	414.3
Church	154	1.3	201	1.7	30.5
Pets & Vets	16	0.1	38	0.3	137.5
Funeral Services	2	*	1	*	-50.0
Tobacco	1	*	2	*	100.0
Politics	24	0.2	17	0.1	-29.2
Long Distance/Cellular	1	*	7	0.1	600.0
Magazines (non-gay)	0	0	0	0	0

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

Percent of Gay-Specific Ads by Category					
	2010		**2011**		**Change % 2010-2011**
	#	**%**	**#**	**%**	
Total Gay-Specific Ads	**11,888**	**72.4**	**11,979**	**68.1**	**-5.9**
Phone Services/Personals	916	100.0	1,076	99.4	-0.6
Gay-Oriented Media	308	99.9	379	96.9	-3.0
Classifieds	227	97.8	328	94.8	-3.1
Travel	809	97.4	809	93.9	-3.6
Eat & Drink	2,421	83.3	3,041	87.8	5.4
Events	248	95.4	322	84.7	-11.2
Health/Fitness/Grooming	805	85.5	848	81.9	-4.2
Arts & Entertainment	886	71.7	961	73.2	2.1
Professional Services (small space ads)	1,398	78.6	740	68.5	-12.8
Fashion & Accessories	111	50.5	165	54.5	7.9
Retail	544	49.9	843	52.8	5.8
Services/Non-Medical	1,667	58.1	1,132	49.9	-14.1
Beverage/Alcohol	16	30.2	77	43.3	43.4
Financial Services	191	60.8	139	39.0	-35.9
Medical/Health-Related	472	59.9	378	36.7	-38.7
Real Estate	516	65.4	239	34.6	-47.1
Automotive	37	18.9	75	24.8	31.2
Home	97	35.1	53	21.5	-38.7

Number of Gay-Specific Ad Pages					
	2010		2011		Change %
	#	%	#	%	2010-2011
Total Number of Pages	**7,902**	**100.0**	**8,848**	**100.0**	**12.0**
Real Estate	**314**	**4.0**	**187**	**2.1**	**-40.4**
Financial Services	**176**	**2.2**	**123**	**1.4**	**-30.1**
Viaticals	0	0	0	0	0
Mortgages	20	0.3	26	0.3	30.0
Banks	17	0.2	26	0.3	52.9
Insurance	91	1.1	43	0.5	-52.7
Investments	48	0.6	27	0.3	-43.8
Credit Cards	0	0	1	*	0
Health/Fitness/Grooming	**458**	**5.8**	**547**	**6.2**	**19.4**
Fitness/Health	421	5.3	462	5.2	9.7
Cosmetics	34	0.4	77	0.9	126.5
Hair Growth	3	*	0	0	-100.0
Vitamins	0	0	8	0.1	0
Medical/Health-Related	**367**	**4.6**	**339**	**3.8**	**-7.6**
Pharmaceuticals	27	0.3	35	0.4	29.6
Medical/HIV	141	1.8	143	1.6	1.4
Medical/Non-HIV	151	1.9	144	1.6	-4.6
Help lines	48	0.6	17	0.2	-64.6
Arts & Entertainment	**752**	**9.5**	**810**	**9.2**	**7.7**
Theater/Dance	345	4.4	496	5.6	43.8
Movies/Video	210	2.6	143	1.6	-31.9
Records/CDs/Concerts	70	0.9	52	0.6	-25.7
Books/Bookstores	47	0.6	38	0.4	-19.1
Sports	56	0.7	38	0.4	-32.1
Comedy	8	0.1	18	0.2	125.0
TV/Cable	9	0.1	13	0.2	44.4
Radio	7	0.1	12	0.2	71.4
Travel	**639**	**8.1**	**667**	**7.5**	**4.4**
Hotels/Resorts	267	3.4	327	3.7	22.5
Destinations	257	3.3	132	1.5	-48.6
Travel Agents	106	1.3	160	1.8	50.9
Airlines	6	0.1	18	0.2	200.0
Rental Cars	3	*	11	0.1	266.7
Trains	0	0	19	0.2	0
Eat & Drink	**2,096**	**26.5**	**2,620**	**29.6**	**25.0**
Bars & Clubs	1,813	22.9	2,287	25.8	26.1
Restaurants	283	3.6	333	3.8	17.7

Number of Gay-Specific Ad Pages (continued)					
	2010		**2011**		**Change %**
	#	**%**	**#**	**%**	**2010-2011**
Total Number of Ads	**7,902**	**100.0**	**8,848**	**100.0**	**12.0**
Events	**244**	**3.1**	**316**	**3.6**	**29.5**
Gay Events/Meetings	108	1.4	105	1.2	-2.8
AIDS Events/Fundraisers	136	1.7	211	2.4	55.1
Retail	**467**	**5.9**	**782**	**8.8**	**67.5**
Retail Products & Services	447	5.7	706	8.0	57.9
Food & Markets	20	0.2	16	0.2	-20.0
Electronics	0	0	60	0.6	0
Home	**90**	**1.1**	**50**	**0.6**	**-44.4**
Home Furnishings/Décor	63	0.8	31	0.4	-50.8
Florists/Nurseries	27	0.3	19	0.2	-29.6
Fashion & Accessories	**93**	**1.2**	**162**	**1.8**	**74.2**
Fashion/Clothing	63	0.8	139	1.6	120.6
Jewelry	30	0.4	23	0.2	-23.3
Beverage/Alcohol	**16**	**0.2**	**77**	**0.9**	**381.3**
Liquor/Non-Beer	4	*	39	0.5	875.0
Beer	12	0.2	38	0.4	216.7
Gay-Oriented Media	**266**	**3.4**	**358**	**4.0**	**34.6**
Gay Magazines	99	1.3	159	1.8	60.6
Gay Internet Sites	167	2.1	199	2.2	19.2
Automotive	**37**	**0.5**	**71**	**0.8**	**91.9**
Dealers	25	0.3	39	0.4	56.0
Manufacturers	12	0.2	32	0.4	166.7
Professional Services (small space ads)	**226**	**2.8**	**87**	**1.0**	**-61.5**
Services/Non-Medical	**956**	**12.1**	**792**	**9.0**	**-17.2**
Phone Services/Personals	**306**	**3.9**	**318**	**3.6**	**3.9**
Classifieds	**220**	**2.8**	**233**	**2.6**	**5.9**
Other	**179**	**2.3**	**309**	**3.5**	**72.6**
Recruiting/Jobs	21	0.3	105	1.2	400.0
Church	118	1.5	146	1.7	23.7
Pets & Vets	15	0.2	38	0.4	153.3
Funeral Services	2	*	1	*	-50.0
Tobacco	1	*	2	*	100.0
Politics	21	0.3	10	0.1	-52.4
Long Distance/Cellular	1	*	7	0.1	600.0
Magazines (non-gay)	0	0	0	0	0

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