

2014 Gay Press Report

TOPLINE

- **Spending Continues to Set a Record**

Ad spending in the Gay Press in 2014 is estimated at \$405.7 million, up 6.4%.

- **Circulation is Down**

Circulation is down 13.8% because of fewer titles, representing fewer issues. However, this is well in line with normal fluctuations in LGBT media. For example 2013's circulation was up 15.1% from 2012. Interesting in 2014 that Local Magazines are flourishing (up 8.7% in circulation and 18.6% in number of ads).

- **Nine of every Ten Ad Dollars Continue to be Spent on Local Publications**

Local publications comprise 90.1% of all spending and capture 96.3% of all ads.

- **The Proportion of Gay-Specific Ads Continues to Grow**

Gay-specific ads (ads with explicit reference to gay and lesbian lifestyles in graphics and/or messages) account for 60.7% of all ads, up 8%.

2014 Gay Press Report

About the Gay Press Report: *The Gay Press Report* is published by Rivendell Media. This report has been published annually since 1994, and the 2014 *Gay Press Report* is the twentieth annual report that tracks all advertising and revenue in the gay press.

Methodology: The report includes all publications that specifically and exclusively target the LGBT market, and covers all publications regardless of representation by Rivendell. All titles are gathered for the month of April, as it is considered an average month in the gay media cycle. All advertising therein is categorized, measured and tracked. The resulting information is then used to represent the 12 months comprising the calendar year.

About Rivendell Media: Rivendell Media was founded in 1979 and is currently in its 36th year of business. Rivendell Media represents 94% of all gay print media and their digital extensions, as well as standalone digital media. Known as the experts in gay media, the company primarily works behind the scenes to help advertising agencies place successful campaigns aimed at LGBT consumers.



2014 Gay Press Report

EXPANDED FINDINGS

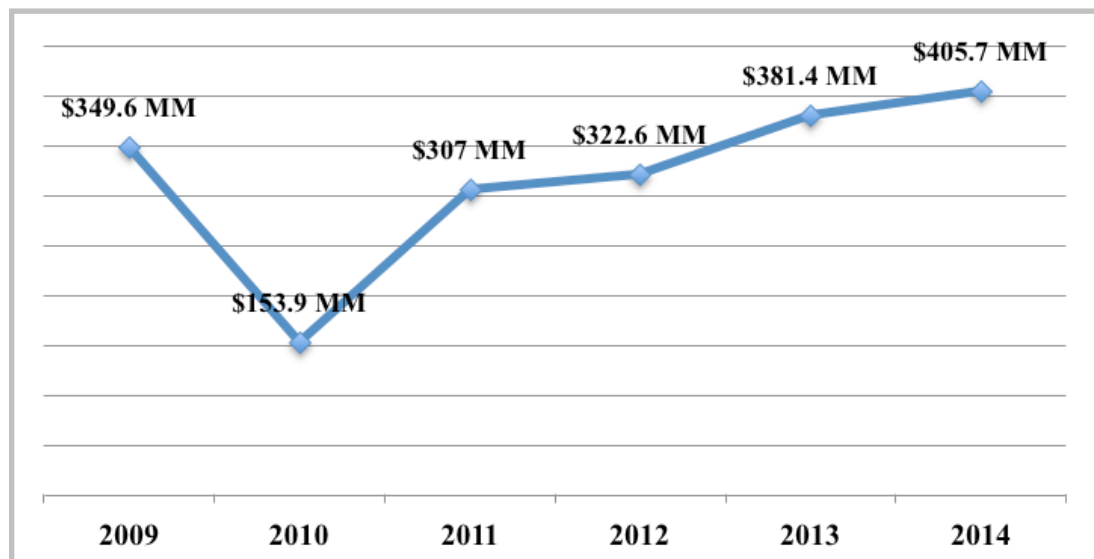
Rivendell Media, the premier gay and lesbian media placement firm in the United States and Canada, presents the twentieth annual *Gay Press Report*, covering 2014.

Advertising spending in the Gay Press has risen to \$405.7 million in 2014, setting another record and in the process affirming the industry’s continuing recovery from the Great Recession.

This result demonstrates a respectable gain of 6.4% since 2013 (which delivered \$381.4 million, +18.2%). While not as large an increase as that of a year ago, 2014 marks the fourth straight year of steady growth since Gay Press revenues bottomed out in 2010.

Reflecting everything gone wrong with the economy at that time, Gay Press revenues fell to \$153.9 million (-56.0%), the lowest reading since 1998. While 2011 showed an impressive attempt at recovery (\$307 million, +99.5%), and 2012 achieved more traction (\$322.6 million, +5.1%), 2013 was the first year that Gay Press advertising revenues were able to climb out of the hole. Sales totaled \$381.4 million, setting a new record and gaining 18.2% over the year before. Thus the Gay Press in 2014, with revenues of \$405.7 million under its belt (+6.4% vs. 2013), clearly continues to advance.

Revenue in the Gay Press



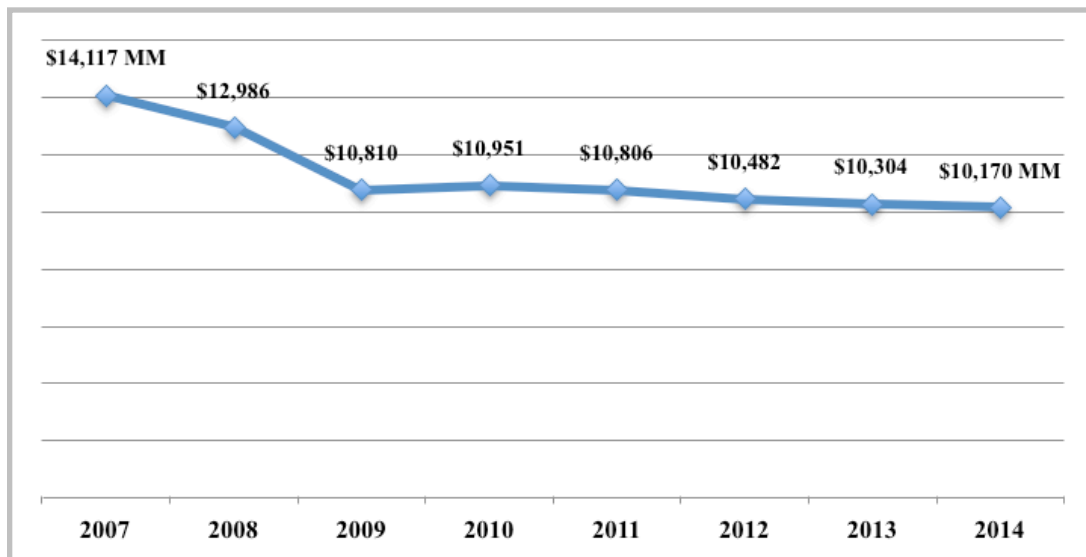
2014 Gay Press Report

During the same time period, advertising revenues for Consumer Magazines have persisted in drifting downward. 2014 prolongs that course, as the sector's estimate comes in at \$10,170 million (aka \$10.2 billion), a loss of 1.3% since 2013.

Since 2007 (except for 2010, as referenced below), Consumer Magazine revenues steadily declined from a high of \$14,117 million to \$12,986 million in 2008 (-8.0%) and \$10,810 million in 2009 (-16.8%).

While 2010 brought a slight uptick, gaining revenues of \$10,951 million (+1.3%), 2011's figure fell to \$10,806 million (-1.3%), and in 2012 dropped to \$10,482 million (-3.0%). In 2013, spending was \$10,304 million (-1.7%), and in 2014, rests at \$10,170 million (-1.3%), the lowest level since 1997.

Revenue in Consumer Magazines



2014 Gay Press Report

As has often been the case, advertising spending in the Gay Press continues to outpace that of Consumer Magazines:

Gay Press revenues keep growing, reaching an all-time high of \$405.7 million in 2014 (up 6.4% since 2013).

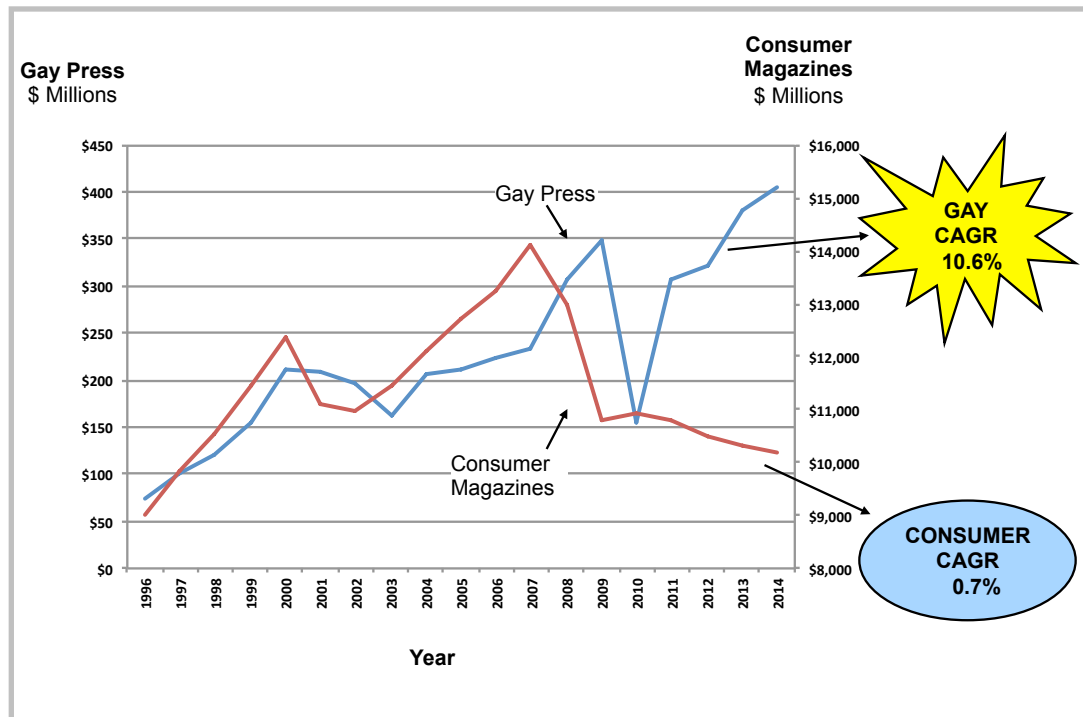
In contrast, Consumer Magazine revenues continue to decline, delivering non-stop losses in six of the past seven years (except for 2010).

- Current revenues are estimated at \$10,170 million (aka \$10.2 billion, down 1.3% vs. YAG) compared to a high of \$14,117 million in 2007, an alarming decrease of 28% from then until now.

Since 1996, Gay Press revenues have grown 453.5% versus 12.9% for Consumer Magazines. This converts into compound annual growth rates (CAGR) of 10.6% and 0.7% respectively, revealing that from 1996 to 2014, ad revenues for the Gay Press have increased more than 15 times faster than those of Consumer Magazines.

Growth in Ad Spending — Gay Press Vs. Consumer Magazines

(Compound Annual Growth Rate: 1996–2014)



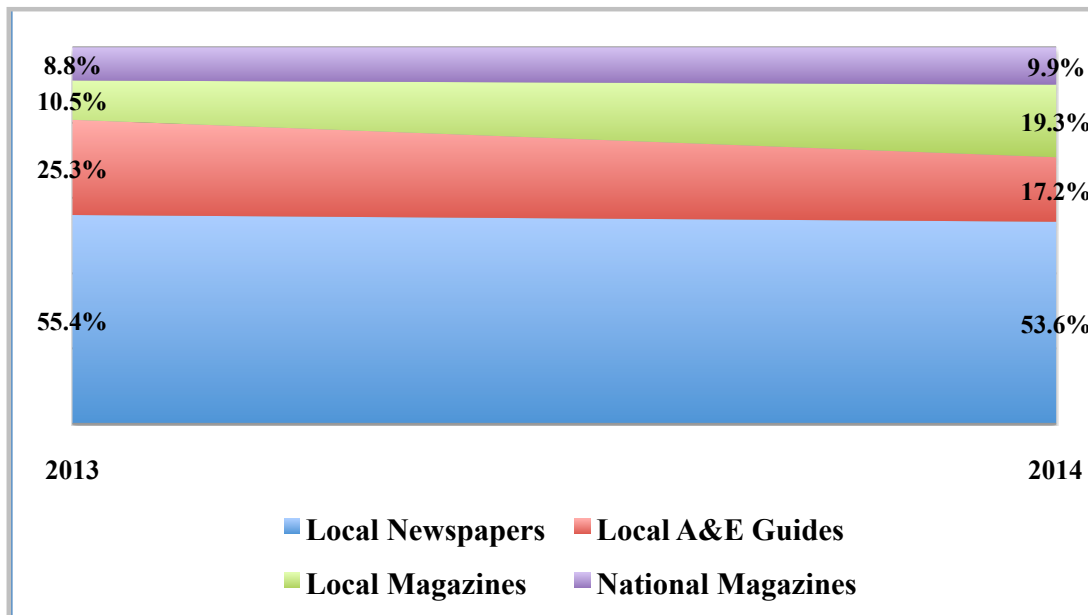
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As usual, local publications capture nine of every ten dollars (90.1%) spent on advertising in the Gay Press. In 2014, only 9.9% of revenues go to National Magazines.

Breaking it down, Local Newspapers account for 53.6% of sales, Local Magazines collect 19.3% and Local A&E Guides bring in 17.2%.

Overall, Gay Press proceeds are up 6.4%. As evident in the chart below, Local Magazines have accrued most of this, gaining a remarkable 95% since 2013. At the same time, while spending for National Magazines has advanced 19.5%, this category embodies only 3.7% of ads. Conversely, local publications comprise 96.3%.

Percent of Advertising Spending by Type of Publication



2014 Gay Press Report

Over the past year, the number of Gay Press issues available for examination has declined from 209 to 196 (down 6.2%), accompanied by corresponding downturns in circulation (-13.8%) and number of ads (-20.8%). As both of the latter measures are related to number of issues, this is not a surprise.

In 2014, the number of issues is 196 (representing 109 titles), down from 209 in 2013 (-6.2%). As explained in the methodology section (below), this is not a cause for alarm, as the number of issues (as well as the number of titles that they represent) varies from year to year.

Circulation is now 2,322,613 (compared to 2,695,763 a year ago, -13.8%). Heaviest losses are in National Magazines (down -25.5%) and Local A&E Guides (-24.3%).

Number of ads is 13,226, dropping from 16,694 (-20.8%). Again, Local A&E Guides (-40.9%) and National Magazines (-38.1%) account for most of this slippage. But Local Newspapers have also lost a large proportion of ads (-21.5%).

At the same time, Local Magazines are flourishing (+36.6% in number of issues, +8.7% in circulation and +18.6% in number of ads).

Versus 2013, ad spending in Local Magazines has increased by 95%; the only loss is in Local A&E Guides, which are down 27.5% in revenues.

2014 Gay Press Report

Since 2002 we have been tracking the proportion of ads in the Gay Press that make explicit references to gay and lesbian lifestyles in terms of graphics and/or messages (“gay-specific ads”). When we began following this, only 9.9% of all ads were gay-specific.

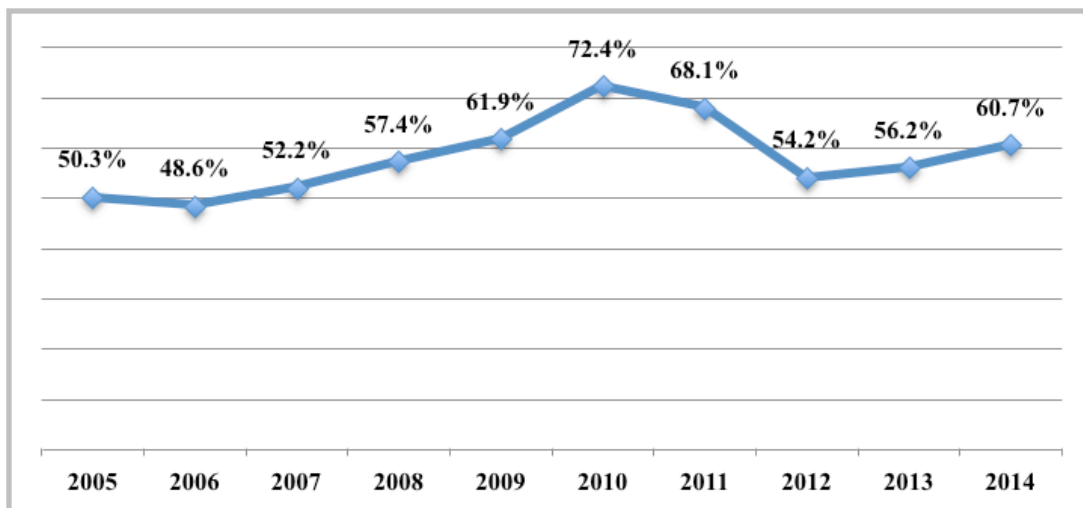
This percentage gradually increased over time. In 2003, it advanced to 15.1%, and in 2004 — the same year Massachusetts initiated same-sex marriage — it soared to 44.1%. By 2005, a slight majority of ads — 50.3% — was gay-specific.

In 2006, that proportion unexpectedly dropped to 48.6%, but by 2007 comprised 52.2%. In 2008, it rose to 57.4%; in 2009, to 61.9%; and by 2010 gay-specific ads reached an astounding 72.4%.

After 2010 (perhaps because of business decisions made during the financial crisis), the percent of gay-specific ads declined for two years — falling to 68.1% in 2011 and 54.2% in 2012.

Since then, the proportion of such ads has been recovering – amounting to 56.2% in 2013 and 60.7% in 2014, up 8% versus a year ago.

Percent of Gay-Specific Ads in the Gay Press



2014 Gay Press Report Appendix

Background

For two decades, the *Gay Press Report* has been keeping tabs on advertising in the gay and lesbian press, the only entity to do so.

Each year, Rivendell Media collects all gay and lesbian publications in the United States, measures the number and scope of the advertising therein, analyzes its content and produces the *Gay Press Report*. Changes are tracked over time, and comparisons made across products and industries.

The *Gay Press Report* therefore serves both as an archive of historical data as well as a record of what has transpired in LGBT advertising during a specific year. As such, it is an indispensable resource for advertisers, publishers and other parties who are interested in and want to better understand and more effectively engage the attention of gay and lesbian consumers.

While it is difficult to determine the exact size of the LGBT community, research indicates that between 6-7% of adults 18 and over are willing to self-identify as lesbian, gay, bisexual and/or transgender (about 16 million people). Whatever the magnitude of this segment, it is clear that its members have unique characteristics and are influential. In 2013, their buying power was estimated at \$830 billion.

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 interests and concerns, and as a result, demonstrate stronger brand loyalty to these advertisers than their straight counterparts. As a result, smart marketers choose to make LGBT consumers a priority.

2014 Gay Press Report Appendix

Methodology

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

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

We chose April as the basis for the *Gay Press Report* because the industry regards what happens during April as being typical of what happens during other months in advertising. Thus we use figures from April to portray all that has transpired in the 12 months since our previous report (here May 2013 through April 2014).

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 2014, we began gathering publications dated the first Friday (April 4), and stopped collecting them four weeks and one day later, on the fifth Friday (May 2). This 29-day time period insures methodological consistency from one year to the next, and allows us to make apple-to-apple comparisons.

In preparation for the 2014 *Gay Press Report*, Rivendell assembled and examined a total of 196 issues (comprised of 109 individual titles), virtually the entirety of the gay and lesbian press published in the United States during April 2014.

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 are able to arrive at an estimate of advertising spending in the gay and lesbian press for the current year.

2014 Gay Press Report Appendix

Advertising Spending

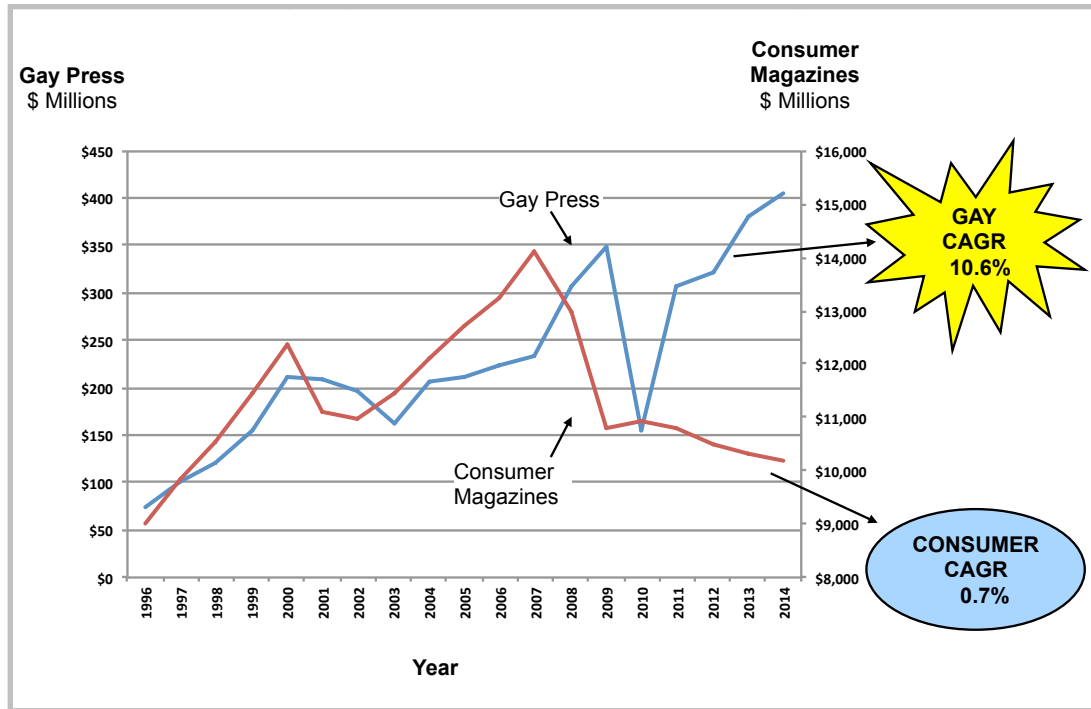
Year	Gay Press		Consumer Magazines	
	\$ Millions	Change	\$ Millions	Change
1994	53.0			
1995	61.6	16.2%		
1996	73.3	19.0	9,010.0	5.0%
1997	100.2	36.7	9,821.0	9.0%
1998	120.4	20.2	10,518.0	7.1%
1999	155.3	29.0	11,433.0	8.7%
2000	211.6	36.3	12,370.0	8.2%
2001	208.1	-1.7	11,095.0	-10.3%
2002	196.0	-5.8	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	13,239.0	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	10,951.0	1.3%
2011	307.0	99.5	10,806.0	-1.3%
2012	322.6	5.1	10,482.0	-3.0%
2013	381.4	18.2	10,304.0	-1.7%
2014	405.7	6.4	10,170.0	-1.3%

Source: Consumer magazine spending numbers are from Veronis Suhler Stevenson, as featured in its publication, *VSS Communications Industry Forecast, 2012-2016*. All numbers represent actual expenditures except for 2012, 2013 and 2014, which are projections.

2014 Gay Press Report Appendix

Growth in Ad Spending — Gay Press Vs. Consumer Magazines

(Compound Annual Growth Rate: 1996–2014)



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Advertising Spending by Type of Publication

	2013		2014		Change in \$ 2013-2014
	\$	%	\$	%	
Total Dollars	381.4	100.0	405.7	100.0	6.4%
Local Newspapers	211.4	55.4	217.5	53.6	2.9%
Local Magazines	40.2	10.5	78.4	19.3	95.0%
Local A&E Guides	96.4	25.3	69.9	17.2	-27.5%
National Magazines	33.4	8.8	39.9	9.9	19.5%

Number of Issues Analyzed by Type of Publication

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Total Issues Analyzed	209	100.0	196	100.0	-6.2%
Local Newspapers	99	47.4	88	44.9	-11.1%
Local Magazines	41	19.6	56	28.6	36.6%
Local A&E Guides	48	23.0	38	19.4	-20.8%
National Magazines	21	10.0	14	7.1	-33.3%

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Circulation by Type of Publication

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Total Circulation	2,695,763	100.0	2,322,613	100.0	-13.8%
National Magazines	1,193,663	44.3	889,426	38.3	-25.5%
Local Magazines	584,350	21.7	635,350	27.4	8.7%
Local Newspapers	555,000	20.6	523,337	22.5	-5.7%
Local A&E Guides	362,750	13.4	274,500	11.8	-24.3%

Number of Ads by Type of Publication

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Total Ads	16,694	100.0	13,226	100.0	-20.8%
Local Newspapers	8,115	48.6	6,369	48.1	-21.5%
Local Magazines	2,961	17.7	3,513	26.6	18.6%
Local A&E Guides	4,833	29.0	2,858	21.6	-40.9%
National Magazines	785	4.7	486	3.7	-38.1%

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Number of Ads by Category

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Total Number of Ads	16,694	100.0	13,226	100.0	-20.8%
Real Estate	605	3.6	585	4.4	-3.3%
Financial Services	398	2.4	323	2.5	-18.8%
Viaticals	10	0.1	8	0.1	-20.0%
Mortgages	48	0.3	60	0.4	25.0%
Banks	63	0.4	23	0.2	-63.5%
Insurance	187	1.1	156	1.2	-16.6%
Investments	89	0.5	75	0.6	-15.7%
Credit Cards	1	*	1	*	0%
Health/Fitness/Grooming	806	4.8	637	4.8	-21.0%
Fitness/Health/Hygiene	691	4.1	587	4.4	-15.1%
Cosmetics	110	0.7	42	0.3	-61.8%
Hair Growth	5	*	8	0.1	60.0%
Vitamins	0	0	0	0	0%
Medical/Health-Related	1,120	6.7	859	6.5	-23.3%
Pharmaceuticals	212	1.2	304	2.3	43.4%
Medical – HIV	413	2.5	182	1.4	-55.9%
Medical – Non-HIV	482	2.9	368	2.8	-23.7%
Helpline	13	0.1	5	*	-61.5%
Arts & Entertainment	1,049	6.3	1,166	8.8	11.2%
Theater/Dance	602	3.6	591	4.5	-1.8%
Movies/Video	104	0.6	112	0.9	7.7%
Records/CDs/Concerts	170	1.0	149	1.1	-12.4%
Books/Bookstores	96	0.6	85	0.6	-11.5%
Sports	39	0.2	58	0.4	48.7%
Comedy	13	0.1	13	0.1	0%
TV/Cable	9	0.1	6	*	-33.3%
Radio	16	0.1	152	1.2	850.0%
Travel	664	4.0	485	3.7	-27.0%
Hotels/Resorts	483	2.9	366	2.8	-24.2%
Travel Agents/Tours/Destinations	148	0.9	96	0.7	-35.1%
Airlines	19	0.1	0	0	-100.0%
Rental Cars	9	0.1	17	0.1	88.9%
Trains	5	*	6	*	20.0%
Eat and Drink	3,971	23.8	2,559	19.4	-35.6%
Bars & Clubs	3,006	18.0	1,842	13.9	-38.7%
Restaurants	965	5.8	717	5.5	-25.7%

2014 Gay Press Report Appendix

Number of Ads by Category (continued)

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Total Number of Ads	16,694	100.0	13,226	100.0	-20.8%
Events	801	4.8	703	5.3	-12.2%
Gay Events/Meetings	577	3.5	576	4.3	-0.2%
Fundraisers	224	1.3	127	1.0	-43.3%
Retail	1,724	10.3	1,314	9.9	-23.8%
Retail Products & Services	1,623	9.7	1,261	9.5	-22.3%
Food & Markets	49	0.3	43	0.3	-12.2%
Electronics/Computers	52	0.3	10	0.1	-80.8%
Home	465	2.8	214	1.6	-54.0%
Home Furnishings/Décor	284	1.7	161	1.2	-43.3%
Florists/Nurseries	181	1.1	53	0.4	-70.7%
Fashion & Accessories	436	2.6	203	1.5	-53.4%
Fashion/Clothing	326	1.9	123	0.9	-62.3%
Jewelry	110	0.7	80	0.6	-27.3%
Beverage Alcohol	134	0.8	112	0.9	-16.4%
Liquor – Non-Beer	97	0.6	93	0.7	-4.1%
Beer	37	0.2	19	0.2	-48.6%
Gay-Oriented Media	383	2.3	209	1.6	-45.4%
Gay Magazines	100	0.6	99	0.8	-1.0%
Gay Internet Sites	283	1.7	110	0.8	-61.1%
Automotive	230	1.4	204	1.5	-11.3%
Dealers	96	0.6	123	0.9	28.1%
Manufacturers	134	0.8	81	0.6	-39.6%
Professional Services (small space ads)	856	5.1	757	5.7	-11.6%
Services/Non-Medical	1,330	8.0	1,720	13.0	29.3%
Phone Services/Personals	790	4.7	500	3.8	-36.7%
Classifieds	354	2.1	222	1.7	-37.3%
Other	578	3.5	454	3.4	-21.5%
Recruiting/Jobs	78	0.5	44	0.3	-43.6%
Churches/Synagogues	187	1.1	138	1.0	-26.2%
Pets & Vets	238	1.4	197	1.5	-17.2%
Funeral Services/Cemeteries	14	0.1	22	0.2	57.1%
Tobacco	1	*	22	0.2	2,100.0%
Politics	59	0.4	19	0.1	-67.8%
Long Distance/Cellular	0	0	12	0.1	0%
Magazines (non-gay)	1	*	0	0	-100.0%

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Number of Ads by Category — Changes 2013–2014

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Notable Increases					
Services/Non-Medical	1,330	8.0	1,720	13.0	29.3%
Arts & Entertainment	1,049	6.3	1,166	8.8	11.2%
About The Same					
Real Estate	605	3.6	585	4.4	-3.3%
Notable Decreases					
Automotive	230	1.4	204	1.5	-11.3%
Professional Services (small space ads)	856	5.1	757	5.7	-11.6%
Events	801	4.8	703	5.3	-12.2%
Beverage Alcohol	134	0.8	112	0.9	-16.4%
Financial Services	398	2.4	323	2.5	-18.8%
Health/Fitness/Grooming	806	4.8	637	4.8	-21.0%
Medical/Health-Related	1,120	6.7	859	6.5	-23.3%
Retail	1,724	10.3	1,314	9.9	-23.8%
Travel	664	4.0	485	3.7	-27.0%
Eat and Drink	3,971	23.8	2,559	19.4	-35.6%
Phone Services/Personals	790	4.7	500	3.8	-36.7%
Classifieds	354	2.1	222	1.7	-37.3%
Gay-Oriented Media	383	2.3	209	1.6	-45.4%
Fashion & Accessories	436	2.6	203	1.5	-53.4%
Home	465	2.8	214	1.6	-54.0%

2014 Gay Press Report Appendix

Number of Ads by Individual Items — Changes 2013– 2014

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Notable Increases					
Tobacco	1	*	22	0.2	2,100.0%
Radio	16	0.1	152	1.2	850.0%
Rental Cars	9	0.1	17	0.1	88.9%
Hair Growth	5	*	8	0.1	60.0%
Funeral Services/Cemeteries	14	0.1	22	0.2	57.1%
Sports	39	0.2	58	0.4	48.7%
Pharmaceuticals	212	1.2	304	2.3	43.4%
Automobile Dealers	96	0.6	123	0.9	28.1%
Mortgages	48	0.3	60	0.4	25.0%
Trains	5	*	6	*	20.0%
About The Same					
Movies/Video	104	0.6	112	0.9	7.7%
Comedy	13	0.1	13	0.1	0%
Long Distance/Cellular	0	0	12	0.1	0%
Credit Cards	1	*	1	*	0%
Vitamins	0	0	0	0	0%
Gay Events/Meetings	577	3.5	576	4.3	-0.2%
Gay Magazines	100	0.6	99	0.8	-1.0%
Theater/Dance	602	3.6	591	4.5	-1.8%
Liquor – Non-Beer	97	0.6	93	0.7	-4.1%
Notable Decreases					
Books/Bookstores	96	0.6	85	0.6	-11.5%
Food & Markets	49	0.3	43	0.3	-12.2%
Records/CDs/Concerts	170	1.0	149	1.1	-12.4%
Fitness/Health/Hygiene	691	4.1	587	4.4	-15.1%
Investments	89	0.5	75	0.6	-15.7%
Insurance	187	1.1	156	1.2	-16.6%
Pets & Vets	238	1.4	197	1.5	-17.2%
Viaticals	10	0.1	8	0.1	-20.0%
Retail Products & Services	1,623	9.7	1,261	9.5	-22.3%
Medical – Non-HIV	482	2.9	368	2.8	-23.7%
Hotels/Resorts	483	2.9	366	2.8	-24.2%
Restaurants	965	5.8	717	5.5	-25.7%
Churches/Synagogues	187	1.1	138	1.0	-26.2%

2014 Gay Press Report Appendix

Number of Ads by Individual Items — Changes 2013– 2014

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Notable Decreases (continued)					
Jewelry	110	0.7	80	0.6	-27.3%
TV/Cable	9	0.1	6	*	-33.3%
Travel Agents/Tours/Destinations	148	0.9	96	0.7	-35.1%
Bars & Clubs	3,006	18.0	1,842	13.9	-38.7%
Automobile Manufacturers	134	0.8	81	0.6	-39.6%
Fundraisers	224	1.3	127	1.0	-43.3%
Home Furnishings/Décor	284	1.7	161	1.2	-43.3%
Recruiting/Jobs	78	0.5	44	0.3	-43.6%
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Banks	63	0.4	23	0.2	-63.5%
Politics	59	0.4	19	0.1	-67.8%
Florists/Nurseries	181	1.1	53	0.4	-70.7%
Electronics/Computers	52	0.3	10	0.1	-80.8%
Magazines (non-gay)	1	*	0	0	-100.0%
Airlines	19	0.1	0	0	-100.0%

2014 Gay Press Report Appendix

Number of Ads by Category by Type of Publication

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Local Newspapers	8,115	100.0	6,369	100.0	-21.5%
Services/Non-Medical	810	10.0	1,008	15.8	24.4%
Eat and Drink	1,157	14.2	924	14.5	-20.1%
Retail	904	11.1	637	10.0	-29.5%
Arts & Entertainment	590	7.3	600	9.4	1.7%
Medical/Health-Related	647	8.0	444	7.0	-31.4%
Professional Services (small space)	552	6.8	414	6.5	-25.0%
Events	444	5.5	364	5.7	-18.0%
Real Estate	391	4.8	346	5.4	-11.5%
Health/Fitness/Grooming	284	3.5	273	4.3	-3.9%
Phone Services/Personals	389	4.8	205	3.2	-47.3%
Travel	239	2.9	205	3.2	-14.2%
Financial Services	260	3.2	187	2.9	-28.1%
Classifieds	213	2.6	125	2.0	-41.3%
Automotive	151	1.9	117	1.9	-22.5%
Gay-Oriented Media	180	2.2	109	1.7	-39.4%
Home	332	4.1	77	1.2	-76.8%
Beverage Alcohol	55	0.7	44	0.7	-20.0%
Fashion & Accessories	113	1.4	42	0.7	-62.8%
Other	404	5.0	248	3.9	-38.6%
Local Magazines	2,961	100.0	3,513	100.0	18.6%
Eat and Drink	499	16.9	588	16.7	17.8%
Services/Non Medical	296	10.0	494	14.1	66.9%
Retail	423	14.3	324	9.2	-23.4%
Professional Services (small space)	269	9.1	317	9.0	17.8%
Arts & Entertainment	256	8.6	315	9.0	23.0%
Medical/Health-Related	146	4.9	206	5.9	41.1%
Events	174	5.9	186	5.3	6.9%
Real Estate	117	4.0	164	4.7	40.2%
Health/Fitness/Grooming	133	4.5	148	4.2	11.3%
Travel	124	4.2	127	3.6	2.4%
Financial Services	96	3.2	111	3.2	15.6%
Home	68	2.3	78	2.2	14.7%
Automotive	37	1.3	60	1.7	62.2%
Classifieds	60	2.0	57	1.6	-5.0%
Fashion & Accessories	92	3.1	48	1.4	-47.8%
Phone Services/Personals	19	0.6	47	1.3	147.4%
Gay-Oriented Media	47	1.6	45	1.3	-4.3%
Beverage Alcohol	22	0.7	23	0.6	4.5%
Other	83	2.8	175	5.0	110.8%

2014 Gay Press Report Appendix

Number of Ads by Category by Type of Publication

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Local A&E Guides	4,833	100.0	2,858	100.0	-40.9%
Eat & Drink	2,249	46.5	1,020	35.7	-54.6%
Retail	339	7.0	333	11.6	-1.8%
Phone Services/Personals	360	7.5	234	8.2	-35.0%
Arts & Entertainment	144	3.0	220	7.7	52.8%
Health/Fitness/Grooming	386	8.0	213	7.4	-44.8%
Events	140	2.9	136	4.8	-2.9%
Services/Non-Medical	189	3.9	135	4.7	-28.6%
Medical/Health Related	285	5.9	134	4.7	-53.0%
Travel	167	3.5	101	3.5	-39.5%
Real Estate	94	1.9	73	2.6	-22.3%
Home	57	1.2	48	1.7	-15.8%
Classifieds	81	1.7	40	1.4	-50.6%
Beverage Alcohol	50	1.0	36	1.3	-28.0%
Automotive	34	0.7	24	0.8	-29.4%
Gay-Oriented Media	79	1.6	23	0.8	-70.9%
Professional Services (small space)	17	0.4	23	0.8	35.3%
Financial Services	31	0.6	22	0.8	-29.0%
Fashion & Accessories	49	1.0	18	0.6	-63.3%
Other	82	1.7	25	0.9	-69.5%
National Magazines	785	100.0	486	100.0	-38.1%
Fashion & Accessories	182	23.2	95	19.5	-47.8%
Services/Non-Medical	35	4.5	83	17.1	137.1%
Medical/Health-Related	42	5.3	75	15.4	78.6%
Travel	134	17.1	52	10.7	-61.2%
Gay-Oriented Media	77	9.8	32	6.6	-58.4%
Arts & Entertainment	59	7.5	31	6.4	-47.5%
Eat and Drink	66	8.4	27	5.6	-59.1%
Retail	58	7.4	20	4.1	-65.5%
Events	43	5.5	17	3.5	-60.5%
Phone Services/Personals	22	2.8	14	2.9	-36.4%
Home	8	1.0	11	2.3	37.5%
Beverage Alcohol	7	0.9	9	1.9	28.6%
Professional Services (small space)	18	2.3	3	0.6	-83.3%
Financial Services	11	1.4	3	0.6	-72.7%
Automotive	8	1.0	3	0.6	-62.5%
Health/Fitness/Grooming	3	0.4	3	0.6	0%
Real Estate	3	0.4	2	0.4	-33.3%
Classifieds	0	0	0	0	0%
Other	9	1.1	6	1.2	-33.3%

2014 Gay Press Report Appendix

Percent of Gay-Specific Ads by Type of Publication

	2013		2014		Change in % 2013-2014
	#	%	#	%	
Total Gay-Specific Ads	9,386	56.2	8,024	60.7	8.0%
Local A&E Guides	3,638	75.3	1,979	69.2	-8.1%
Local Newspapers	3,984	49.1	3,834	60.2	22.6%
Local Magazines	1,327	44.8	1,988	56.6	26.3%
National Magazines	437	55.7	223	45.9	-17.6%

Number of Gay-Specific Ads by Type of Publication

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Total Gay-Specific Ads	9,386	100.0	8,024	100.0	-14.5%
Local Newspapers	3,984	42.4	3,834	47.8	-3.8%
Local Magazines	1,327	14.1	1,988	24.8	49.8%
Local A&E Guides	3,638	38.8	1,979	24.6	-45.6%
National Magazines	437	4.7	223	2.8	-49.0%

2014 Gay Press Report Appendix

Number of Gay-Specific Ads by Category

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Total Number of Ads	9,386	100.0	8,024	100.0	-14.5%
Real Estate	192	2.0	216	2.7	12.5%
Financial Services	92	1.0	113	1.4	22.8%
Viaticals	5	0.1	2	*	-60.0%
Mortgages	4	*	25	0.3	525.0%
Banks	16	0.2	17	0.2	6.3%
Insurance	56	0.6	46	0.6	-17.9%
Investments	11	0.1	23	0.3	109.1%
Credit Cards	0	0	0	0	0%
Health/Fitness/Grooming	617	6.6	491	6.1	-20.4%
Fitness/Health/Hygiene	566	6.0	481	6.0	-15.0%
Cosmetics	51	0.6	9	0.1	-82.4%
Hair Growth	0	0	1	*	0%
Vitamins	0	0	0	0	0%
Medical/Health-Related	251	2.7	203	2.5	-19.1%
Pharmaceuticals	6	0.1	26	0.3	333.3%
Medical – HIV	130	1.4	71	0.9	-45.4%
Medical – Non-HIV	107	1.1	101	1.2	-5.6%
Helpline	8	0.1	5	0.1	-37.5%
Arts & Entertainment	467	5.0	627	7.8	34.3%
Theater/Dance	191	2.0	299	3.7	56.5%
Movies/Video	84	0.9	86	1.1	2.4%
Records/CDs/Concerts	69	0.7	87	1.1	26.1%
Books/Bookstores	81	0.9	75	0.9	-7.4%
Sports	33	0.4	54	0.7	63.6%
Comedy	4	*	2	*	-50.0%
TV/Cable	2	*	6	0.1	200.0%
Radio	3	*	18	0.2	500.0%
Travel	581	6.2	384	4.8	-33.9%
Hotels/Resorts	427	4.6	291	3.6	-31.9%
Travel Agents/Tours/Destinations	135	1.4	79	1.0	-41.5%
Airlines	17	0.2	0	0	-100.0%
Rental Cars	2	*	10	0.1	400.0%
Trains	0	0	4	0.1	0%
Eat and Drink	3,053	32.5	1,934	24.1	-36.7%
Bars & Clubs	3,004	32.0	1,842	23.0	-38.7%
Restaurants	49	0.5	92	1.1	87.8%

2014 Gay Press Report Appendix

Number of Gay-Specific Ads by Category (continued)

	2013		2014		Change in # 2013-2014
	#	%	#	%	
Total Number of Ads	9,386	100.0	8,024	100.0	-14.5%
Events	668	7.1	624	7.8	-6.6%
Gay Events/Meetings	506	5.4	525	6.6	3.8%
Fundraisers	162	1.7	99	1.2	-38.9%
Retail	489	5.2	517	6.5	5.7%
Retail Products & Services	466	5.0	497	6.2	6.7%
Food & Markets	3	*	13	0.2	333.3%
Electronics/Computers	20	0.2	7	0.1	-65.0%
Home	55	0.6	33	0.4	-40.0%
Home Furnishings/Décor	16	0.2	29	0.4	81.3%
Florists/Nurseries	39	0.4	4	*	-89.7%
Fashion & Accessories	127	1.3	42	0.5	-66.9%
Fashion/Clothing	113	1.2	27	0.3	-76.1%
Jewelry	14	0.1	15	0.2	7.1%
Beverage Alcohol	12	0.1	17	0.2	41.7%
Liquor – Non-Beer	5	*	16	0.2	220.0%
Beer	7	0.1	1	*	-85.7%
Gay-Oriented Media	325	3.5	183	2.3	-43.7%
Gay Magazines	100	1.1	93	1.2	-7.0%
Gay Internet Sites	225	2.4	90	1.1	-60.0%
Automotive	28	0.3	41	0.5	46.4%
Dealers	22	0.2	23	0.3	4.5%
Manufacturers	6	0.1	18	0.2	200.0%
Professional Services (small space ads)	605	6.4	521	6.5	-13.9%
Services/Non-Medical	589	6.3	1,168	14.6	98.3%
Phone Services/Personals	749	8.0	500	6.2	-33.2%
Classifieds	308	3.3	206	2.6	-33.1%
Other	178	1.9	204	2.5	14.6%
Recruiting/Jobs	45	0.5	39	0.5	-13.3%
Churches/Synagogues	70	0.7	109	1.4	55.7%
Pets & Vets	13	0.1	17	0.2	30.8%
Funeral Services/Cemeteries	8	0.1	4	*	-50.0%
Tobacco	1	*	17	0.2	1,600.0%
Politics	40	0.4	11	0.1	-72.5%
Long Distance/Cellular	0	0	7	0.1	0%
Magazines (non-gay)	1	*	0	0	-100.0%

2014 Gay Press Report Appendix

Percent of Gay-Specific Ads by Category

	2013		2014		Change in % 2013-2014
	#	%	#	%	
Notable Increases					
Services/Non-Medical	589	6.3	1,168	14.6	98.3%
Automotive	28	0.3	41	0.5	46.4%
Beverage Alcohol	12	0.1	17	0.2	41.7%
Arts & Entertainment	467	5.0	627	7.8	34.3%
Financial Services	92	1.0	113	1.4	22.8%
Real Estate	192	2.0	216	2.7	12.5%
About The Same					
Retail	489	5.2	517	6.5	5.7%
Events	668	7.1	624	7.8	-6.6%
Notable Decreases					
Professional Services (small space ads)	605	6.4	521	6.5	-13.9%
Medical/Health-Related	251	2.7	203	2.5	-19.1%
Health/Fitness/Grooming	617	6.6	491	6.1	-20.4%
Classifieds	308	3.3	206	2.6	-33.1%
Phone Services/Personals	749	8.0	500	6.2	-33.2%
Travel	581	6.2	384	4.8	-33.9%
Eat and Drink	3,053	32.5	1,934	24.1	-36.7%
Home	55	0.6	33	0.4	-40.0%
Gay-Oriented Media	325	3.5	183	2.3	-43.7%
Fashion & Accessories	127	1.3	42	0.5	-66.9%

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