

## CONSUMER MAGAZINE ADVERTISING LINAGE FOR JANUARY-MARCH 2004

THE SECOND QUARTER'S NUMBERS for magazines brightened considerably from the sluggish first quarter detailed below, but some trendlines of the year began making themselves apparent early. A near-flat performance at national business titles, which saw ad pages sink 2.7% in the first quarter, nonetheless presages the positive figures that the big-three of McGraw-Hill Cos.' *Business Week*, *Forbes*, and *Time Inc.*'s *Fortune* began putting on the board as the year went on. Elsewhere, travel titles significantly turned around their weak first-quarter performance, in which pages dropped 25.9%, with leading titles like American Express Publishing Corp.'s *Travel & Leisure* and *Conde Nast Traveler* pushing ad pages well into the black. It looks likely this is the last truly ugly quarterly linage report publishers will suffer through; the unanswered question is if the ad-page recovery remains halting or picks up speed in the months to come.

—JON FINE

	1st-quarter ad pages	
	2004	2003
<b>AUTOMOTIVE</b>		
Automobile Magazine C.	183.72	189.78
AutoWeek (52X) C.	247.81	279.53
Car & Driver C.	270.97	235.12
Cycle World C.	186.75	197.31
Dirt Rider	248.25	275.92
Family Motor Coaching	538.68	550.16
Hot Rod C.	11.92	95.28
Motor Trend C.	243.83	236.81
Motorhome	217.26	207.66
Ride BMX (9X) C.	191.92	227.16
Rider	95.00	98.00
Road & Track C.	283.43	264.85
Trailer Life	178.05	201.01
<b>TOTAL GROUP</b>	<b>2897.59</b>	<b>3058.59</b>
% CHANGE	-5.26	

	1st-quarter ad pages	
	2004	2003
<b>BOATING &amp; YACHTING</b>		
Boating C.	349.50	346.90
Chesapeake Bay	169.20	181.21
Motorboating C.	302.20	325.78
Offshore	295.38	280.66
Power & Motoryacht C.	643.48	648.63
Yachting C.	626.91	541.94
<b>TOTAL GROUP</b>	<b>2386.67</b>	<b>2325.12</b>
% CHANGE	2.65	

	1st-quarter ad pages	
	2004	2003
<b>COMPUTERS</b>		
PC Magazine C.	385.04	426.02
PC World	259.70	252.70
Wired C.	198.59	173.37
<b>TOTAL GROUP</b>	<b>843.33</b>	<b>852.09</b>
% CHANGE	-1.03	

	1st-quarter ad pages	
	2004	2003
<b>GENERAL</b>		
AARP - The Magazine C.	86.02	73.32
American Heritage (8X) C.	27.00	31.87
ARTnews	169.75	235.92
The Atlantic Monthly C.	139.73	140.55
Audubon (6X) C.	51.46	62.98
Biography C.	0.00	85.52
Bon Appetit C.	223.33	224.12
Buena Vida	139.64	133.45
Celebrated Living C.	40.00	34.33
Coastal Living (6X) C.	189.26	231.02
Cooking Light (11X) C.	261.28	270.37
Departures (7X) C.	225.20	197.67
Diabetes Forecast C.	128.43	170.67
Ebony C.	240.80	256.19
Food & Wine C.	275.62	224.85
Gourmet C.	223.86	219.83
Guideposts C.	97.12	72.54
Medicine C.	60.04	42.94
My Generation C.	0.00	21.75
National Geographic C.	111.93	81.34
Natural History C.	53.57	74.35
Out C.	138.24	125.84
Paper Crafts Magazine (10X)	53.28	54.38
Prevention C.	278.07	251.26
Reader's Digest C.	239.58	200.20
Reader's Digest Large Edition C.	52.34	48.80
Reader's Digest Selecciones C.	85.86	100.84
Remedy C.	83.03	40.40
Robb Report C.	232.83	216.83
Saturday Evening Post (9X) C.	83.60	81.69
Savour (8X) C.	60.12	59.22
Smithsonian C.	117.35	128.55

	1st-quarter ad pages	
	2004	2003
<b>Town &amp; Country C.</b>	<b>329.87</b>	<b>305.61</b>
Travelhost	362.17	352.34
Utne Magazine (6X)	70.89	70.86
Vanity Fair C.	444.15	375.86
Yankee C.	107.51	101.53
<b>TOTAL GROUP</b>	<b>5482.93</b>	<b>5326.47</b>
% CHANGE	2.94	

	1st-quarter ad pages	
	2004	2003
<b>HOME</b>		
American Woodworker (7X) C.	44.35	53.96
Architectural Digest C.	339.66	361.23
Better Homes & Gardens C.	436.83	412.32
Columbus Monthly Homes (4X)	23.25	28.07
Country Home C.	177.31	148.33
Country Living C.	236.54	198.87
Elle Decor (8X) C.	107.71	107.58
Family Handyman (10X) C.	114.27	111.67
Garden Design (6X) C.	34.38	35.81
Gardener (6X) C.	21.61	19.02
Home (10X) C.	133.67	134.59
House & Garden C.	129.23	175.28
House Beautiful C.	186.22	186.29
Martha Stewart Living (10X) C.	174.42	264.20
Metropolis (10X)	120.83	168.21
Metropolitan Home (6X) C.	203.53	175.97
Midwest Living (6X) C.	315.71	90.30
06-Organic Gardening (9X) C.	41.81	50.08
Phoenix Home/Garden	405.65	360.53
San Diego Home/Garden (14X) E.	199.88	208.21
Southern Accents (6X) C.	184.02	178.60
Southern Living C.	302.90	324.93
Sunset Magazine C.	189.95	220.21
This Old House (6X) C.	158.37	142.14
Traditional Home (6X) C.	92.75	89.44
Veranda C.	231.18	201.56
Workbench (6X)	62.50	69.10
<b>TOTAL GROUP</b>	<b>4668.53</b>	<b>2905.05</b>
% CHANGE	-9.55	

	1st-quarter ad pages	
	2004	2003
<b>IN-FLIGHT &amp; OTHER PASSENGER</b>		
Alaska Airlines	177.90	147.90
American Express' Sky Guide C.	60.23	60.73
America West Airlines Magazine	228.00	176.00
American Way (24X) C.	302.03	291.10
Hemispheres C.	158.65	132.47
Nexos (4X) C.	45.33	47.50
Sky Magazine C.	176.45	166.23
Southwest Airlines Spirit C.	252.01	222.96
US Airways Attache C.	158.04	141.51
<b>TOTAL GROUP</b>	<b>1558.64</b>	<b>1386.40</b>
% CHANGE	12.42	

	1st-quarter ad pages	
	2004	2003
<b>MEN'S</b>		
Blender C.	108.80	115.80
Details C.	222.00	209.22
Esquire C.	213.50	204.68
Firehouse Magazine	146.33	200.76
FHM (11X) C.	169.94	133.67
GO C.	251.96	322.52
Maxim (12X) C.	218.38	231.65
Men's Fitness C.	177.29	179.80
Men's Health (10X) C.	179.33	175.05
Men's Journal C.	170.42	186.20
Muscle & Fitness C.	334.17	383.20
Playboy C.	186.78	136.90
Stuff for Men C.	150.16	157.92
<b>TOTAL GROUP</b>	<b>2529.06</b>	<b>2637.37</b>
% CHANGE	-4.11	

	1st-quarter ad pages	
	2004	2003
<b>METROPOLITAN</b>		
Boston	269.20	279.50
Chicago	263.26	233.15
Chicago's North Shore	126.63	122.37
Columbus Monthly	190.65	208.08
Connecticut	136.26	176.50
Diablo	259.11	241.56
Indianapolis Monthly	397.00	345.00
Madison	116.74	97.99
Minneapolis/St. Paul	404.78	402.36
Minnesota Monthly Magazine	344.80	304.30
New Jersey Monthly	185.30	203.50
Palm Springs Life	309.00	326.00
Philadelphia	238.90	276.60
Phoenix Magazine	213.29	166.57
Rhode Island Monthly (13X)	210.91	201.53
San Diego	295.50	272.75
San Francisco Magazine	168.59	168.60
Texas Monthly C.	333.58	365.52
The Washingtonian	283.74	275.11
<b>TOTAL GROUP</b>	<b>4747.24</b>	<b>4666.99</b>
% CHANGE	1.72	

	1st-quarter ad pages	
	2004	2003
<b>MUSIC/ENTERTAINMENT</b>		
The Cable Guide C.	0.00	18.00
Country Weekly (26X) C.	183.84	172.67
MovieLine (11X) C.	0.00	50.00
National Enquirer (52X) C.	224.23	287.98
People En Espanol (10X) C.	100.13	100.67
Premiere C.	89.13	85.57
Rolling Stone (25X) C.	197.74	214.01
Star (52X) C.	194.54	249.35
The Source C.	208.97	264.00
Spin C.	131.82	143.49
Sound & Vision C.	122.33	126.33
Vibe (10X) C.	243.80	250.91
<b>TOTAL GROUP</b>	<b>1696.53</b>	<b>1962.98</b>
% CHANGE	-13.57	

	1st-quarter ad pages	
	2004	2003
<b>OUTDOOR &amp; SPORT</b>		
American Handgunner (6X)	111.20	113.30
American Hunter	69.32	71.61
American Rifleman (11X)	71.86	82.22
Backpacker (9X) C.	105.94	100.56
B.A.S.S. Times	123.15	119.19
Bassmaster (10X) C.	136.04	160.48
Bicycling (10X) C.	56.14	66.52
Ducks Unlimited (6X) C.	55.33	50.58
ESPN Magazine (26X) C.	331.06	334.27
Field & Stream C.	105.97	95.04
Flying C.	155.50	161.50
Florida Sportsman	358.60	371.90
Golf Digest C.	339.38	381.86
Golf Magazine C.	301.87	320.13
Guns Magazine E.	81.80	82.70
In-Fisherman (8X)	148.20	135.30
Links (7X)	191.00	145.00
Nat'l Geographic Adventure (6X) C.	71.30	77.88
Outdoor Life C.	50.25	54.00
Outside Magazine C.	139.59	144.78
NFL Insider (8X) C.	0.00	49.00
Runner's World C.	114.00	98.42
Salt Water Sportsman C.	328.30	322.58
Shooting Times Magazine	86.95	90.86
Sierra (6X) C.	40.00	38.16
Ski (8X) C.	191.81	257.13
Skating (7X) C.	153.58	176.13
Tennis C.	64.92	72.58
Transworld BMX C.	89.64	137.00
Transworld Skateboarding C.	497.46	635.52
Transworld Snowboarding (8X) C.	462.54	505.78
Transworld Stance C.	0.00	137.85
Transworld Surf (9X) C.	192.83	117.33
Travel & Leisure Golf (6X) C.	188.67	180.87
<b>TOTAL GROUP</b>	<b>5414.20</b>	<b>5888.03</b>
% CHANGE	-8.05	

	1st-quarter ad pages	
	2004	2003
<b>PARENTHOOD</b>		
American Baby C.	161.73	150.99
Baby Talk (10X) C.	84.35	99.97
Child (10X) C.	173.49	158.42
Fit Pregnancy (6X) C.	117.12	89.30
Nick Jr. (6X) C.	40.45	44.75
Parenting C.	216.91	222.26
Parents Magazine C.	303.01	319.71
Scholastic Parent & Child (6X) C.	49.88	41.67
Working Mother C.	86.34	70.55
<b>TOTAL GROUP</b>	<b>1233.28</b>	<b>1197.62</b>
% CHANGE	2.98	

	1st-quarter ad pages	
	2004	2003
<b>PHOTOGRAPHY</b>		
American Photo (6X) C.	109.02	96.65
Outdoor Photographer (10X)	160.59	160.59
PC Photo	104.87	120.57
Popular Photography C.	380.00	390.76
<b>TOTAL GROUP</b>	<b>754.48</b>	<b>768.57</b>
% CHANGE	-1.83	

	1st-quarter ad pages	
	2004	2003
<b>SCIENCE/TECHNOLOGY</b>		
Discover C.	67.65	64.17
Popular Mechanics C.	200.23	165.38
Popular Science C.	178.78	159.90
Scientific American C.	110.50	69.30
Spectrum C.	111.62	128.07
Technology Review (6X) C.	85.01	76.12
<b>TOTAL GROUP</b>	<b>753.79</b>	<b>662.94</b>
% CHANGE	13.70	

	1st-quarter ad pages	
	2004	2003
<b>TRAVEL</b>		
Arthur Frommer's Budget Travel C.	115.00	151.70
Conde Nast Traveler C.	303.27	314.11
Endless Vacation (6X) C.	157.46	183.69
Nat'l Geographic Traveler (6X) C.	100.44	109.49
Travel & Leisure C.	330.21	355.83
Travel Holiday (10X) C.	0.00	242.77
<b>TOTAL GROUP</b>	<b>1006.38</b>	<b>1357.59</b>
% CHANGE	-25.87	

	1st-quarter ad pages	
	2004	2003
<b>WEEKLIES/BI-WEEKLIES</b>		
The Advocate C.	185.15	166.49
The Army Times Military Group:		
Air Force Times (52X)	259.70	296.72
Army Times (52X)	278.93	295.68
Navy Times (52X)	276.88	289.00
Entertainment Weekly (52X) C.	366.97	396.32
Golfweek (52X)	221.45	235.55
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