

SQAD MONTHLY

2008
AUGUST
VOLUME 11
ISSUE 8
\$7.00

SQAD MARKET INDICATORS

TV SMI August 2008

DP	Mkts	Mkts	Mkts	Mkts	Mkts	SMI
	++	+	0	-	--	
EM	59	49	98	2	2	1.38
DAY	33	53	114	9	1	1.18
EF	37	59	108	6	0	1.21
EN	27	34	132	12	5	1.12
PA	49	53	101	5	2	1.29
PR	48	57	102	2	1	1.29
LN	18	33	141	15	3	1.08
LF	27	31	131	17	4	1.13

SMI = (# PLUSES + #SAME+1) / (# MINUSES + #SAME+1)
 An SMI greater than 1.00 indicates a tightening of the daypart in general, while an SMI less than 1.00 indicates a softening of the daypart in general. This SMI represents the ratio of the 3 numbers reported for each daypart.

KEY: +++>=5%(higher), ++>=2.5% but <5%(higher), 0 <2.5% change in either direction, ->=2.5% but <5% (lower), -->=5%(lower)

Hispanic Spot TV SMI July 2008

DP	Mkts	Mkts	Mkts	Mkts	Mkts	SMI
	++	+	0	-	--	
EM	9	1	2	3	4	1.455
DAY	11	1	1	3	3	1.889
EF	9	0	2	1	7	1.182
EN	5	2	5	2	5	1.000
PR	3	1	6	1	8	0.706
LN	5	1	5	1	7	0.867

Media Usage Across Three Screens: TV, Internet and Mobile

*Under 35's Watch Video on Internet & Mobile Phones More Than Over 35's;
 Traditional TV Viewing Continues to Grow*

The Nielsen Company released the first comparable U.S. figures showing video and TV usage across the 'three screens' – Television, Internet and Mobile devices.

Nielsen's findings show that screen time of the average American continues to increase from last year with TV users watching more TV than ever before (127 hours, 15 minutes per month), while also spending 9% more time using the Internet (26 hours, 26 minutes per month). At the same time, a small but growing number of Internet and mobile phone users are watching video online (2 hours, 19 minutes

	Time Spent in Hours:Minutes May 2008							
	K2-11	T12-17	A18-24	A25-34	A35-44	A45-54	A55-64	A65+
On Traditional TV*	87:00	89:09	103:27	118:59	124:01	145:03	159:59	177:50
Watching Timeshifted TV*	4:16	3:36	3:55	9:28	8:13	6:46	5:49	2:57
Using the Internet**	4:58	12:01	12:18	29:00	38:47	33:52	34:44	26:01
Watching Video on Internet**	1:30	1:45	3:41	3:22	2:48	2:03	1:33	1:12
Mobile Video Subscribers								
Watching Video on a Mobile Phone^	n/a**	05:25**	3:02	3:36	2:53	2:53	2:10	n/a*

Source: The Nielsen Company

* TV includes live viewing plus any playback viewing; Timeshifted TV is playback primarily on a DVR but including playback on services like Start Over as well as playback from a DVD recorder.
 ** Internet figures are from home and work. Hours:minutes are based on the universe of persons who watch online video.
 ^ Survey results reported in April 2008, this is a Q1 2008 estimate of only those mobile subscribers that subscribe to and use video on their mobile phone, over the past 30 days.
 ** Nielsen Mobile's survey reports mobile video usage for those users 13 and older. Thus, 12-17 is T13-17 for all mobile data.
 * A65+ base size too small to report mobile video hours:minutes.

per month), as well as using their cell phones to watch video (3 hours, 15 minutes per month).

TELEVISION: The U.S. television landscape is growing increasingly more complex and digital. As of May 2008, more than 65% of U.S. homes receive digital cable and satellite combined. These digital TV homes receive nearly 160 channels. In addition, 25% and 35% of U.S. homes have DVR and Video on Demand respectively.

INTERNET: Two hundred twenty million Americans have Internet access at home and/or work, and 73%, or 162 million, went online in May. Watching video on the Internet is no longer a novelty; 119 million unique viewers viewed 7.5 billion video streams in May 2008. In addition as of Q1 2008, 91 million Americans (36% of all mobile phone subscribers in the U.S.) owned a video-capable phone.

Regarding these three screen findings, John Burbank, CMO for The Nielsen Company, said, "Commercial television is alive and well – growing 1% year over year – despite the rapid adoption of other platforms. Moreover, timeshifting represents less than 5% of total viewing. Web video is changing the definition of the Internet for those under the age of 24. Those under 24 use the Internet less than older users but spend a greater percent of time viewing video. For instance, children 2-11 spend relatively little time on the Internet – just 4:58 vs. 38:47 for adults 35-44. But much more of their time is likely spent watching video than checking email or traditional websites. While the number of mobile video users is relatively small at about 4 million, the video usage these early adopters report is impressive, perhaps due to "always available" mobile devices. It is an early indicator of how this technology is becoming more commonplace among mobile users." ●

INSIDE: ■ Media Usage Across Three Screens ■ SQAD TV Data Shows the "Dukakis Effect"
 ■ SQAD Data in Telmar's NetSpot RF ■ SQAD NetCosts Used in TargetCast ■ Radio Update – PPM MarketTrends Analysis

ROUTE TO: _____

SQAD Data now Available in Telmar's NetSpot RF

Telmar, a leading supplier of computer based advertising media information services, adds SQAD cost-per-point data to their broadcast applications featuring Telmar's new NetSpot RF.

Telmar's new comprehensive television and print module for allocating GRPs into spot markets calculates local market reach and frequency in addition to GRP delivery for national schedules in

DMAs. With the addition of SQAD spot TV costs, NetSpot RF can be used to allocate by dollars, spot-fill by GRPs, impressions, or by percent reach. Additionally, NetSpot RF allocates GRPs, which may be apportioned to meet marketing objectives defined by BDI, CDI, or other sales/marketing weights. Telmar's NetSpot RF works with Network, Cable (by demo), Syndication and national Print, providing enhanced usage of Nielsen VIP data. SQAD spot TV subscribers can now seamlessly import cost-per-point data by market, demo and daypart. ●

SQAD in the News: SQAD NetCosts Used in TargetCast Analysis

MediaDailyNews

Prime-Time Costs Fall

Jul 11, 2008 - By David Goetzl, MediaPost

The upfront may have shown high demand, but prime-time prices were significantly lower in the second quarter, according to a new analysis. Those results were noteworthy, considering scatter prices were believed to be considerably up over 2007 upfront costs back in the early spring -- though that market has slowed.

Overall, average network prime-time unit costs for the April-June period fell 11.1% to \$139,728, with all Big Four networks experiencing a decline.

"American Idol"-fueled Fox, and ABC saw pricing dips on the lower end, while NBC and CBS saw double-digit drops, according to the research from independent media agency TargetCast tcm.

According to the analysis, CBS average pricing fell 18% year-over-year to \$118,294, followed by NBC, which declined 15.1% to \$103,693. ABC saw a 5.1% drop to \$142,194, while Fox declined the least (by 2.7%) and had the highest unit costs at \$254,852. (While "American Idol" no doubt propelled Fox, "24" did not air due to the strike.)

The "rankings" of highest-lowest-priced networks on average unit costs were the same as a year ago.

The research is derived from NetCosts data. The service, run by SQAD, gets reports on spending from some 390 advertisers and agencies. (SQAD has said NetCosts tracks 40% of national TV ad expenditures.)

TargetCast executive Gary Carr said the writers' strike may have had an impact in the declines, since though the strike ended, new episodes of hit shows did not return until the latter part of the April-May period. Some of the series saw ratings declines, even with the fresh episodes.

http://www.mediapost.com/publications/?fa=Articles.showArticle&art_id=86408&passFuseAction=PublicationsSearch.showSearchResults&art_searched=Prime%2DTime%20Costs%20Fall&page_number=0 ●

AdvertisingAge.

Prime-Time Spots Were Less Pricey in Q2

TargetCast TCM Analysis Finds Cost Per Unit Down 11%

July 10, 2008 - By Brian Steinberg

NEW YORK (AdAge.com) -- The effects of the writers strike from earlier this year are becoming more defined. The average cost per unit for a prime-time spot on the four biggest broadcast networks in the second quarter dropped 11.1%, to \$139,728, according to an analysis by independent media shop TargetCast TCM.

Although the strike ended before the second quarter, new episodes of network dramas and comedies didn't start to air until late March and April. "And when new episodes aired, they didn't perform up to pre-strike levels," said Gary Carr, senior VP-director of broadcast services at TargetCast. "Viewers had found other options and didn't rush back to the networks."

Additionally, networks issued more make-goods than in the same period last year, TargetCast said, roughly 20% of inventory, compared with 13% in the second quarter of 2007. Those make-goods, or ad time given to advertisers when networks fall short on ratings guarantees, put more downward pressure on unit prices, Mr. Carr said.

What a spot cost

The analysis shows that network TV pricing continues to suffer. The average cost for a prime-time spot on network TV in the first quarter dropped 12%, to \$125,634, according to a previous TargetCast analysis. The shop said ABC, CBS and Fox saw the average cost of a commercial unit fall between 9% and 12% in the period, while NBC's average unit cost tumbled nearly 25%.

In the second quarter, the average unit cost fell 15.1% on NBC and 18% on CBS, while ABC's average unit cost fell 5.1% and Fox's slipped 2.7%. Fox enjoyed the highest average unit cost, \$254,852, TargetCast said. NBC's was the lowest among the four big broadcast networks, at \$103,693. CBS's was \$118,294, and ABC's was \$142,194.

TargetCast said ratings for adults between the ages of 25 and 54 were down 11% in the second quarter compared with the same period last year.

The analysis uses syndicated research and tracking data from NetCosts System, a service of Tarrytown, N.Y.-based Sqad. The service compiles confidential data from agencies and in-house buying systems to help advertisers understand the unit price relationship with each network and to measure future costs.

http://adage.com/mediaworks/article?article_id=129534&search_phrase=Prime-Time+Spots+Were+Less+Pricey+in+Q2 ●

SQAD in the News: SQAD TV Data Shows the “Dukakis Effect”



SQAD: Obama Shot for Younger Demos, Clinton for Older on TV
Barack Obama placed dollars against the younger demos, while Hillary Clinton targeted older adults

July 15, 2008

-By Katy Bachman

Democratic contenders played to their strengths in their TV media plans by targeting the far ends of the demographic spectrum, according to a SQAD analysis of cost per points in key primary states. Barack Obama tended to place dollars against the younger demos, while Hillary Clinton targeted older adults.

In the six weeks prior to the Texas, Ohio, Wisconsin and Pennsylvania elections, spending to reach 18-34 year-olds and those over 50 increased 11 percent and 10 percent, respectively, compared to 2007. In contrast, the average cost of spots targeting all TV households remained stagnant.

"The desire of candidates to quickly and aggressively act before they fall victim to it has helped the spot TV market evolve into the advertising medium of choice for candidates and political action committees seeking to deliver fresh messages to tightly focused groups of key voters in the weeks leading up to an election," said Neil Klar, CEO of SQAD. "Spot advertising simply delivers maximum ballots for the buck."

In Ohio, for example, Democratic contenders and interest groups bought a combined 19,000 spot commercials at a cost of about \$8 million. CPMs in the 18-34 demo rose 9 percent. But Ohio was also the only one of the four states to show a 4 percent increase among the 35 to 49 demo. CPMs for 50-plus remained unchanged.

CPMs among the 18-34 demo rose by more than 22 percent in Wisconsin, while the CPM targeting women 50 and older rose 7 percent. CPMs among women 18-34 and men over 50 decreased 3 percent and 5 percent, respectively.

Obama and Clinton combined spent more than \$15 million in Texas prior to the March 4 primary. The CPM among men over 50 rose 9 percent and among women was up 19 percent. CPMs among 18-34 year-old males and females rose 8 percent and 6 percent, respectively.

In Pennsylvania, CPMs among 18-34 year-olds and 50-plus age groups increased by 5 percent and 17 percent, respectively.

http://www.mediaweek.com/mw/content_display/news/local-broadcast/e3i5d81a1391066827768a102928cc11bbf ●



SQAD: Democratic ads still reflecting Dukakis effect

July 21, 2008

Twenty years after Willie Horton, the Democratic candidates are still learning from the failed presidential campaign of Michael Dukakis.

A study released today by SQAD, the advertising cost reporter and forecaster, finds that in the recent Democratic primary season, contenders Hilary Clinton and Barack Obama built their media plans around the so-called Dukakis effect, rushing out responses to the others' attack ads almost immediately via spot TV.

The Dukakis effect refers to the 1988 presidential election, when Republican nominee George H.W. Bush released a slew of negative attack ads, including the infamous Horton commercial.

Dukakis' campaign was slow to respond in paid ads, which many believe contributed to his landslide defeat. Not Clinton and Obama.

The two rushed responses onto the air quickly during the primary battle, as when Clinton's "Who do you think has what it takes?" ad in Pennsylvania was followed hours later by Obama's "Who in times of challenge will unite us — not use fear and calculation to divide us?"

SQAD also finds that in the six weeks prior to the Texas, Ohio, Wisconsin and Pennsylvania primaries, spending to reach the 18-34 and over-50 age brackets increased more than 11 percent and 10 percent, respectively, compared to 2007, while the average cost of spots targeting all TV households remained stagnant.

<http://www.medialifemagazine.com/ml/ac/ns071508.asp> ●

Coming Soon: WebCosts

Internet Ad Cost Source Based on Real Transactions

For the first time, cost data will be available for planners, buyers and sellers to understand the web display cost landscape. Now everyone can assess the market value of a proposed placement – before negotiating a buy.

Contact Tom Adams for more information:
 tadams@sqad.com
 or 914.703.6808.

WebCosts 2008 Schedule	
August through October	Contributor enrollment Subscriber enrollment System development
October	WebCosts v1.0 launch! Contributor enrollment Subscriber enrollment

Spot TV MarketTrend Report - August 2008 Input Compared to July 2008 SQAD Issue – Third Quarter 2008

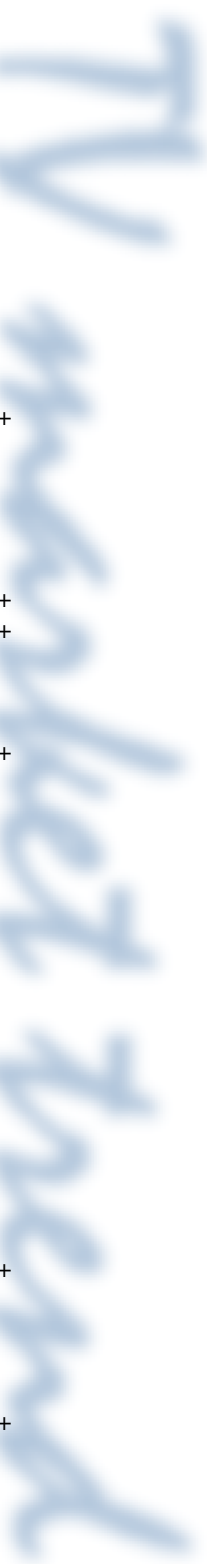
RANK	MARKET	EM	DA	EF	EN	PA	PR	LN	LF
164	ABILENE-SWEETWATER	+	+	+	0	+	+	++	0
146	ALBANY, GA	++	+	0	+	0	+	+	0
56	ALBANY-SCHENECTADY-TR	0	0	0	0	0	0	0	+
44	ALBUQUERQUE-SANTA FE	++	0	0	+	+	0	0	0
180	ALEXANDRIA, LA	0	0	0	0	0	0	-	--
208	ALPENA	0	0	0	0	0	0	0	0
131	AMARILLO	+	0	0	0	0	+	+	0
150	ANCHORAGE	0	0	0	++	0	0	0	-
8	ATLANTA	0	0	0	0	0	0	0	0
115	AUGUSTA	++	+	0	-	0	+	0	0
51	AUSTIN	0	0	0	0	-	0	0	0
125	BAKERSFIELD	0	0	0	0	+	++	0	0
24	BALTIMORE	++	++	+	0	0	0	0	0
152	BANGOR	0	+	+	0	++	0	++	++
94	BATON ROUGE	+	0	++	0	0	+	+	++
141	BEAUMONT-PORT ARTHUR	+	++	++	++	+	+	0	++
192	BEND, OR	0	-	0	-	0	+	--	0
170	BILLINGS	++	++	++	++	++	+	0	++
160	BILOXI-GULFPORT	+	0	0	--	+	+	++	--
156	BINGHAMTON	0	+	+	+	++	++	-	+
40	BIRMINGHAM (ANN AND T	0	0	+	0	0	0	0	+
155	BLUEFIELD-BECKLEY-OAK	0	0	0	0	0	0	0	0
113	BOISE	++	++	+	+	+	0	+	0
7	BOSTON (MANCHESTER)	0	++	+	0	+	0	0	0
183	BOWLING GREEN	0	-	0	-	-	0	0	+
50	BUFFALO	0	0	0	0	0	+	0	0
92	BURLINGTON-PLATTSBURG	++	0	+	+	+	0	0	0
194	BUTTE-BOZEMAN	0	0	0	0	+	+	0	0
198	CASPER-RIVERTON	++	0	++	++	++	++	++	+
87	CEDAR RAPIDS-WTRLO-IW	0	0	0	0	+	0	0	+
84	CHAMPAIGN&SPRNGFLD-DE	0	0	+	0	+	0	0	0
100	CHARLESTON, SC	+	0	+	0	0	0	-	0
65	CHARLESTON-HUNTINGTON	++	+	++	+	+	0	0	+
25	CHARLOTTE	++	0	0	0	0	0	0	0
181	CHARLOTTESVILLE	+	++	++	0	+	0	0	-
86	CHATTANOOGA	0	0	0	-	0	0	-	0
196	CHEYENNE-SCOTTSBLUF	++	++	+	0	+	++	0	++
3	CHICAGO	0	+	0	0	0	0	0	0
130	CHICO-REDDING	+	+	+	++	+	+	0	+
33	CINCINNATI	+	0	0	0	+	0	0	0
166	CLARKSBURG-WESTON	++	+	+	++	++	--	+	+
17	CLEVELAND-AKRON (CANT	++	+	++	+	++	+	+	0
93	COLORADO SPRINGS-PUEB	0	0	0	0	0	0	0	0
81	COLUMBIA, SC	0	0	0	0	0	0	0	0
137	COLUMBIA-JEFFERSON CI	+	0	0	+	++	++	0	+
128	COLUMBUS, GA	0	0	0	0	0	0	0	0
32	COLUMBUS, OH	+	0	0	0	0	0	0	0
133	COLUMBUS-TUPELO-WEST	0	0	-	--	0	0	++	0
129	CORPUS CHRISTI	0	0	0	0	0	0	0	0
5	DALLAS-FT. WORTH	0	0	0	0	0	0	+	0
96	DAVENPORT-R.ISLAND-MO	0	+	++	0	++	0	0	0
62	DAYTON	++	+	0	0	+	0	0	0
18	DENVER	++	++	++	+	+	+	+	+
71	DES MOINES-AMES	0	0	0	0	0	+	0	0

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<u>RANK</u>	<u>MARKET</u>	<u>EM</u>	<u>DA</u>	<u>EF</u>	<u>EN</u>	<u>PA</u>	<u>PR</u>	<u>LN</u>	<u>LF</u>
11	DETROIT	++	+	0	0	0	0	0	0
172	DOTHAN	++	+	++	++	++	++	++	-
138	DULUTH-SUPERIOR	0	0	0	0	0	+	0	0
98	EL PASO	+	0	0	0	0	0	-	0
173	ELMIRA	+	0	0	+	++	0	-	++
142	ERIE	0	0	+	-	++	+	0	-
120	EUGENE	0	0	+	0	0	+	-	0
195	EUREKA	+	++	++	++	++	++	++	0
101	EVANSVILLE	0	0	++	0	++	++	0	0
203	FAIRBANKS	0	0	0	+	0	0	0	0
119	FARGO-VALLEY CITY	+	-	0	--	-	0	-	+
66	FLINT-SAGINAW-BAY CIT	0	0	0	0	0	0	0	0
103	FLORENCE-MYRTLE BEACH	++	+	++	++	++	++	0	0
55	FRESNO-VISALIA	0	0	0	0	0	0	0	-
63	FT. MYERS-NAPLES	0	0	0	0	0	0	0	0
102	FT. SMITH-FAY-SPRNGDL	+	0	0	0	+	+	0	0
107	FT. WAYNE	0	+	+	+	+	0	0	+
162	GAINESVILLE	++	++	++	++	++	++	++	++
210	GLENDIVE	++	++	++	++	++	++	0	++
187	GRAND JUNCTION-MONTRO	+	++	++	++	++	++	+	++
39	GRAND RAPIDS-KALMZOO-	0	0	0	0	0	0	0	0
191	GREAT FALLS	++	++	++	+	++	+	+	++
70	GREEN BAY-APPLETON	++	0	+	0	++	0	0	+
46	GREENSBORO-H.POINT-W.	+	+	0	0	0	0	0	+
105	GREENVILLE-N.BERN-WAS	++	++	++	0	++	0	0	++
36	GREENVLL-SPART-ASHEVL	+	+	+	+	0	++	0	0
184	GREENWOOD-GREENVILLE	0	0	-	--	+	0	0	--
88	HARLINGEN-WSLCO-BRNSV	+	0	0	0	0	0	0	0
41	HARRISBURG-LNCSTR-LEB	++	0	+	0	0	+	+	+
178	HARRISONBURG	+	0	0	0	0	0	0	-
29	HARTFORD & NEW HAVEN	0	0	0	0	++	0	0	0
168	HATTIESBURG-LAUREL	++	++	++	0	++	+	+	++
206	HELENA	+	++	++	++	++	++	++	++
73	HONOLULU	0	0	0	0	0	0	0	0
10	HOUSTON	+	+	0	0	0	0	0	0
83	HUNTSVILLE-DECATUR (F	0	0	0	0	0	0	0	0
163	IDAHO FALLS-POCATELLO	+	+	++	0	++	+	+	0
26	INDIANAPOLIS	0	0	0	0	0	0	0	0
90	JACKSON, MS	++	0	0	-	0	0	0	0
174	JACKSON, TN	+	+	0	++	+	-	+	0
49	JACKSONVILLE	++	0	0	0	+	0	0	0
99	JOHNSTOWN-ALTOONA	++	+	++	+	++	++	0	+
182	JONESBORO	0	0	++	+	++	++	0	++
145	JOPLIN-PITTSBURG	+	+	+	0	++	++	-	0
207	JUNEAU	0	0	0	0	0	0	0	0
31	KANSAS CITY	++	0	0	0	0	+	0	-
58	KNOXVILLE	0	0	0	0	0	+	0	0
127	LA CROSSE-EAU CLAIRE	0	+	0	0	0	++	0	0
189	LAFAYETTE, IN	-	--	-	0	0	0	--	-
123	LAFAYETTE, LA	++	0	0	0	0	0	0	0
176	LAKE CHARLES	--	+	+	++	+	+	0	++
112	LANSING	0	0	0	0	+	0	0	--
188	LAREDO	0	-	0	0	0	++	++	0
43	LAS VEGAS	0	+	0	0	0	+	-	0

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64	LEXINGTON	0	+	+	0	0	++	0	0
185	LIMA	++	-	+	0	++	+	0	0
104	LINCOLN & HASTINGS-KR	+	0	0	0	0	0	0	0
57	LITTLE ROCK-PINE BLUF	0	0	0	-	0	0	+	0
2	LOS ANGELES	+	+	+	+	+	+	+	+
48	LOUISVILLE	0	+	0	0	0	0	0	0
148	LUBBOCK	++	++	++	0	++	+	0	0
121	MACON	++	0	0	0	+	+	0	0
85	MADISON	0	0	0	-	++	0	0	-
200	MANKATO	0	-	0	-	0	++	0	0
179	MARQUETTE	++	++	++	++	+	++	0	0
140	MEDFORD-KLAMATH FALLS	++	0	0	0	-	0	0	0
47	MEMPHIS	+	0	0	0	0	+	+	+
186	MERIDIAN	0	+	0	--	++	++	0	++
16	MIAMI-FT. LAUDERDALE	+	0	0	-	0	0	0	0
34	MILWAUKEE	0	0	0	0	+	0	0	0
15	MINNEAPOLIS-ST. PAUL	+	+	+	+	+	+	0	+
158	MINOT-BISMARCK-DICKIN	0	0	0	+	++	+	+	-
167	MISSOULA	0	0	+	+	0	+	0	+
61	MOBILE-PENSACOLA (FT	++	0	+	0	++	+	++	++
136	MONROE-EL DORADO	++	++	++	+	++	+	++	++
124	MONTEREY-SALINAS	+	0	0	+	0	+	0	0
118	MONTGOMERY (SELMA)	+	+	++	+	+	+	+	+
30	NASHVILLE	++	0	+	0	0	0	0	0
53	NEW ORLEANS	+	0	+	0	0	0	+	++
1	NEW YORK	0	+	0	0	0	0	0	0
42	NORFOLK-PORTSMTH-NEWP	+	0	+	0	0	+	0	0
209	NORTH PLATTE	+	0	0	++	0	+	0	0
157	ODESSA-MIDLAND	+	+	0	0	+	++	+	0
45	OKLAHOMA CITY	+	0	0	0	0	0	0	0
75	OMAHA	0	0	+	0	+	+	+	0
19	ORLANDO-DAYTONA BCH-M	+	0	0	0	0	0	0	0
199	OTTUMWA-KIRKSVILLE	0	0	0	0	0	++	--	+
79	PADUCAH-C.GIRD-HARBG-	++	0	+	+	0	++	0	0
144	PALM SPRINGS	++	++	+	++	+	++	++	+
154	PANAMA CITY	+	++	+	++	++	++	+	0
190	PARKERSBURG	++	++	++	++	0	++	0	0
117	PEORIA-BLOOMINGTON	0	0	0	0	0	0	0	-
4	PHILADELPHIA	++	++	+	0	+	0	0	0
12	PHOENIX	0	+	+	0	++	0	0	0
22	PITTSBURGH	+	0	0	0	0	0	0	0
23	PORTLAND, OR	0	0	0	0	+	+	0	++
76	PORTLAND-AUBURN	0	0	-	0	0	-	-	0
205	PRESQUE ISLE	++	+	++	0	++	+	++	+
52	PROVIDENCE-NEW BEDFOR	0	0	+	0	0	0	0	0
171	QUINCY-HANNIBAL-KEOKU	0	0	0	++	0	++	0	-
28	RALEIGH-DURHAM (FAYET	+	+	0	0	0	0	+	++
175	RAPID CITY	0	+	0	0	--	++	0	-
110	RENO	0	0	+	0	+	+	0	0
59	RICHMOND-PETERSBURG	++	+	0	0	0	+	0	+
67	ROANOKE-LYNCHBURG	0	0	0	0	0	0	0	0



Spot TV MarketTrend Report - August 2008 Input Compared to July 2008 SQAD Issue – Third Quarter 2008

<u>RANK</u>	<u>MARKET</u>	<u>EM</u>	<u>DA</u>	<u>EF</u>	<u>EN</u>	<u>PA</u>	<u>PR</u>	<u>LN</u>	<u>LF</u>
78	ROCHESTER, NY	0	0	0	0	+	0	0	0
153	ROCHESTR-MASON CITY-A	--	-	0	+	0	0	0	-
132	ROCKFORD	0	+	+	0	0	+	0	0
20	SACRAMNTO-STKTON-MODE	0	+	+	++	+	+	0	0
147	SALISBURY	0	++	0	0	0	++	+	0
35	SALT LAKE CITY	0	+	+	0	+	0	0	0
197	SAN ANGELO	++	++	+	++	+	++	++	++
37	SAN ANTONIO	0	0	0	0	+	0	0	0
27	SAN DIEGO	0	+	+	0	0	0	0	0
6	SAN FRANCISCO-OAK-SAN	0	0	+	+	0	0	0	+
122	SANTABARBRA-SANMAR-SA	0	0	0	0	0	0	0	0
97	SAVANNAH	+	+	0	-	+	0	0	0
14	SEATTLE-TACOMA	+	++	0	0	+	0	0	0
161	SHERMAN-ADA	++	++	+	++	++	++	++	++
82	SHREVEPORT	+	+	+	0	0	+	0	-
143	SIOUX CITY	+	+	0	0	++	++	0	0
114	SIOUX FALLS(MITCHELL)	0	-	-	0	+	++	0	-
89	SOUTH BEND-ELKHART	++	0	+	0	0	0	0	0
77	SPOKANE	++	++	+	+	++	++	0	+
74	SPRINGFIELD, MO	0	0	++	0	++	+	0	0
109	SPRINGFIELD-HOLYOKE	+	+	0	+	0	0	0	0
201	ST. JOSEPH	0	0	+	0	--	++	-	0
21	ST. LOUIS	0	0	0	0	0	0	0	0
80	SYRACUSE	0	0	0	0	0	0	0	0
108	TALLAHASSEE-THOMASVIL	+	+	++	+	+	++	0	+
13	TAMPA-ST. PETE (SARAS	0	0	+	+	0	0	0	0
151	TERRE HAUTE	0	0	+	-	0	++	0	0
72	TOLEDO	0	0	0	0	++	+	0	0
139	TOPEKA	+	+	+	0	+	++	+	0
116	TRAVERSE CITY-CADILLA	++	+	+	0	++	+	0	0
91	TRI-CITIES, TN-VA	0	0	0	0	0	0	0	+
68	TUCSON (SIERRA VISTA)	++	0	+	0	0	+	+	0
60	TULSA	0	0	+	0	-	0	0	0
193	TWIN FALLS	-	-	-	0	0	0	+	0
111	TYLER-LONGVIEW(LFKN&N	++	0	+	0	0	+	0	+
169	UTICA	0	0	0	0	++	+	0	++
204	VICTORIA	++	++	++	++	++	++	++	++
95	WACO-TEMPLE-BRYAN	0	0	0	0	0	0	0	0
9	WASHINGTON, DC (HAGRS	0	0	0	0	0	0	+	0
177	WATERTOWN	++	++	++	++	0	+	+	++
134	WAUSAU-RHINELANDER	++	+	0	+	++	++	-	0
38	WEST PALM BEACH-FT. P	0	0	0	0	+	0	0	0
159	WHEELING-STEUBENVILLE	++	0	+	0	++	+	0	0
149	WICHITA FALLS & LAWTO	++	0	++	0	+	0	0	0
69	WICHITA-HUTCHINSON PL	0	++	0	0	++	++	+	0
54	WILKES BARRE-SCRANTON	0	0	+	0	+	0	0	-
135	WILMINGTON	++	+	++	+	+	++	+	0
126	YAKIMA-PASCO-RCHLND-K	0	++	++	0	+	++	-	0
106	YOUNGSTOWN	++	0	+	+	+	++	-	0
165	YUMA-EL CENTRO	++	++	++	++	++	++	++	++
202	ZANESVILLE	0	+	0	+	0	0	+	0

SQAD on the Road: Arbitron PPM Breakfast – Nassau Suffolk (Long Island NY)

As PPM markets begin to roll out, SQAD helps radio stations and agencies understand what the CPP impact has been in both Philadelphia and Houston, along with suggestions on how to use the data to monitor the market prior to and after PPM currency is deployed.

Robin Blum reviewed these existing PPM market CPP changes to station and agency attendees at the Long Island meeting, July 10th in Melville, NY.

Samples of the findings appear on the right.

For more information about how SQAD can help you understand changes in PPM markets, please contact:

East coast: Robin Blum
rblum@sqad.com
914-703-6803

West coast: Samantha Marlowe
smarlowe@sqad.com
323-666-2274

Philadelphia – Ratings down 25% CPPs up 40%

Philadelphia AD 25-49	Last Diary Fall 2006	Current PPM April 2008	Percent Change
Top 20 Stations AQH RTG	0.68%	0.53%	25% Decrease
Feb07 - Apr08 SQAD CPP	\$237	\$331	40% Increase

Houston – Ratings down 26% CPPs up 28%

Houston AD 25-49	Last Diary Fall 2006	Current PPM April 2008	Percent Change
Top 20 Stations AQH RTG	0.67%	0.50%	26% Decrease
Jun07-Apr08 SQAD CPP	\$252	\$325	28% Increase

Data Sources: Arbitron, SQAD, Adults 25-49

Radio Update – PPM MarketTrends

July Radio MarketTrends

As part of our PPM usage tools, SQAD is continuing to provide MarketTrend information for the Arbitron Radio PPM (Portable People Meter) markets – current and upcoming through December 2008.

For in-depth MarketTrend data, please go to:
www.sqad.com/products/spotRadio.jsp

MarketTrends Key:

- ++ >=3% higher
- + >=1.5% BUT <3% higher
- 0 <1.5% change in either direction
- >=1.5% but <3% lower
- >=3% lower

	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
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Existing PPM Markets:

Philadelphia (3/07)	++	++	++	++	++	++	++
Houston (6/07)	++	--	++	++	+	+	+

Future PPM Markets:

New York (9/08)	++	0	++	++	++	++	++
Nassau-Suffolk (9/08)	--	+	0	0	0	0	0
Middlesex-Somerset (9/08)	--	-	--	--	--	--	--
Los Angeles (9/08)	++	0	0	++	++	++	++
Riverside-San Bernardino (9/08)	--	--	-	--	--	--	--
Chicago (9/08)	++	0	++	++	++	++	++
San Francisco (9/08)	++	++	0	++	++	++	++
San Jose (9/08)	--	--	++	++	+	++	+
Dallas-Ft. Worth (9/08)	++	0	++	++	++	++	++
Washington (12/08)	++	+	++	++	++	++	++
Detroit (12/08)	++	++	++	++	++	++	++
Atlanta (12/08)	++	++	++	++	++	++	++

SQAD Holiday Hours

Our Tarrytown, NY and Los Angeles, CA offices will be closing at 1PM local time on Friday, August 29th, and will be closed on Labor Day, September 1st. Enjoy your holiday!