

SQAD MONTHLY

2010
JANUARY
VOLUME 13
ISSUE 1
\$7.00

SQAD MARKET INDICATORS

TV SMI January 2010

	#	#	#	#	#	SMI
DP	Mkts	Mkts	Mkts	Mkts	Mkts	
	++	+	0	-	--	
EM	44	48	92	18	8	1.22
DAY	45	52	83	17	13	1.19
EF	50	46	86	17	11	1.24
EN	60	66	67	7	10	1.33
PA	39	42	95	21	13	1.15
PR	62	52	77	14	5	1.38
LN	58	47	79	14	12	1.30
LF	48	38	89	20	15	1.20

SMI = (#DoublePluses + #SinglePluses + #Same + #SingleMinuses + 1) / (#DoubleMinuses + #SingleMinuses + #Same + #SinglePluses + 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 December 2009

	#	#	#	#	#	SMI
DP	Mkts	Mkts	Mkts	Mkts	Mkts	
	++	+	0	-	--	
EM	6	2	2	3	6	1.000
DAY	8	0	4	0	7	1.083
EF	8	1	6	0	4	1.333
EN	5	3	7	2	2	1.200
PR	5	0	5	2	7	0.867
LN	6	1	6	3	3	1.214

"Do You Know SQAD?"

An Open Letter from CEO Neil Klar

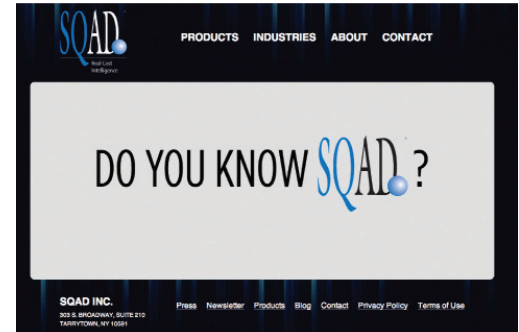
I think almost everyone is glad to say so long to 2009, and from what we are hearing there is cautious optimism about 2010.

Over the past year, with so much changing in the media world, SQAD had no choice but to continue to invest in those initiatives that we had started in 2008. Our largest new venture investments continue to be in [WebCosts®](#), our on-line display database currently being used through DATAVue, the same system used by most of our clients to analyze SQAD's spot broadcast CPP and CPM data. In the first quarter, we will be releasing a new on-line WebCosts system that will provide deeper analysis capabilities, making this growing database that much more valuable and actionable.

Several enhancements were released during 2009 in [NetCosts®](#), the industry's largest and only aggregated source of real costs for national broadcast, cable and syndication. And more are on the way for early 2010, including new charting capabilities. As this database is updated every week, these improvements are making it easier for our growing list of NetCosts subscribers to keep their eyes on what's happening in the National Television marketplace.

In July, [Hispanic Spot TV PLUS](#) was released to subscribers. Significantly more Hispanic buys are now part of this database which is accessed in DATAVue. We extend our thanks to those customers who have assisted us in making the improvements to this service.

There have been countless changes to [WRAP](#) Overnights and WRAP Sweeps over the past year. Staying on top of the many new Nielsen currencies has presented its own set of challenges, and we hope that many of these



are now behind us, and work can continue on new enhancements for both systems.

And finally, last fall the new [www.sqad.com](#) was launched. The thrust of our new website is to be sure that customers and prospects have an opportunity to get to know SQAD. So the opening of [www.sqad.com](#) asks "Do You Know SQAD?" Visitors can scroll through our products, look at the industries that we serve, get a summary of who we are by clicking the ABOUT tab, or contact one of our sales/service representatives by simply filling in the fields under the CONTACT tab. Once the State is filled in, your inquiry automatically goes to the SQAD office servicing your area.

It is important for us to ensure that both our current and prospective customers be in a position to truly KNOW SQAD and what we are all about. To that end, we encourage you to follow the section of the SQAD Monthly entitled "Do You Know SQAD" – our redesigned back page. With your input, we'll share shortcuts and tips to make your job easier, case studies and tricks to analyze the data faster or more efficiently, and add quizzes and other training tools to increase your expertise in knowing SQAD. ●

INSIDE: ■ An Open Letter from Neil Klar
 ■ Web Costs . . . and WebCosts
 ■ NetCosts Graphical Reports Preview

■ Election Tools III: TV Expenditure Forecast
 ■ Do You Know SQAD?
 ■ Ecopy only: Radio PPM Update

ROUTE TO: _____

Web Costs ... and WebCosts®

On December 21, 2009, *AdAge.com*'s Michael Learmonth addresses web CPMs in an article entitled "Who Gets the Highest Ad Rates Online?" It was a survey of "Who's Commanding Top Dollar."

His commentary revolved around a poll to address all of the talk of CPMs going to zero:

"Online ad rates, we're told, are on an express train to zero, helped along by gagillions of impressions generated by Facebook, Twitter and its ilk, and the networks, exchanges and targeting technologies that allow advertisers to buy audience as a commodity, without dealing with individual sites at all.

"And while the recession has put another hit on CPMs -- the term ad buyers and sellers use as shorthand for the cost for 1,000 impressions -- across the web, some sites can still pimp fat ad rates either by virtue of their reach, specialized audience or unique environment.

Who's getting the best ad rates on the web today?..."

Tom Adams, Director/WebCosts, reviewed the slideshow (www.adage.com/digital/article?article_id=141153), "culled from agency buyers and media sellers, (which) is far from scientific, but gives a good sense of who can still charge bank and why" -- and we present his "apples-to-apples" results on same-site measurement: ●

WebCosts® November 2009 Release

Purchase the September report and receive a minimum of two additional WebCosts reports.

Issue Date: Mid-December 2009

Data Cost (incl DATAVue): minimum 3 reports:

Agency - Total Agency Media Billings <\$250 Mln: \$2,500

Agency - Total Agency Media Billings >\$250 Mln: \$5,400

Publishers: \$6,000

Agency Contributors:

Significant discounts are available to contributing agencies. If you are an agency and would like to partner with SQAD and confidentially contribute Web display buy data, please contact Tom Adams at tadams@sqad.com.

Site	AdAge	SQAD WebCosts		
		Low	Average	High
dailycandy.com	\$70 CPM for daily e-mail	\$29.92	\$50.00	\$72.00
WebMD	\$40-60 CPM	\$7.25	\$15.60	\$45.00
MarthaStewart.com	\$25 CPM	\$8.33	\$15.30	\$27.00
Bloomberg.com	\$50 CPM for "C-level display inventory"	\$14.50	\$25.00	\$45.00

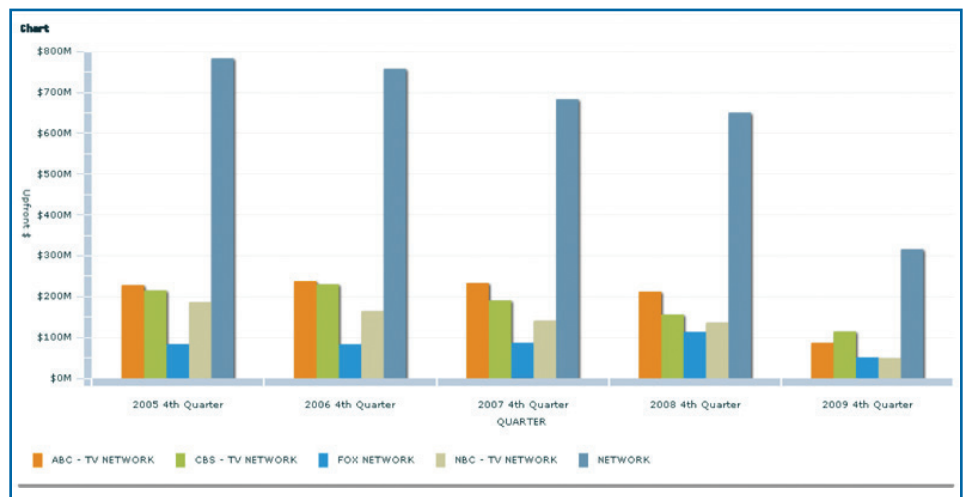
For more information about WebCosts or how to become a contributor, please contact Tom Adams at tadams@sqad.com.

Coming Soon! NetCosts: Three New Graphical Reports

The new NetCosts reports will focus on market trends, providing the ability to chart by quarter or broadcast year key market indicators:

- Upfront/No Charge/Avg. Pricing
- CPM & Ratings
- Revenue & Market Share

NetCosts is the largest source of real cost information for national TV (network, cable, syndication) with data refreshed on a weekly basis. ●



For more information about NetCosts, please contact Larry Fried at lfried@sqad.com.

Election Tools III: Television Expenditure Forecast Positive

In the season of adspend forecasts, recent reports speculate that the 2010 mid-term elections will be a stimulus package for media companies, specifically local television. *Advertising Age* (1/11/10) indicates that as a result of "close congressional races and wide open gubernatorial contests, this year could eclipse 2006's record-breaking midterm spending of \$2.6 billion."

- NATIONAL

- 2009 TV adspend (for 2010 campaign ads) = \$20+ million
- 26 states hold primaries before July 2010 = consistent TV activity forecast through the first half of the year
- With a few long-term politicians not running for re-election, approximately 70 competitive races for the U.S. House, and about one-third of the U.S. Senate up for election, all indications are positive for significant advertising expenditures.

- LOCAL

- Most of the 37 governors' races are "without incumbents running for reelection," driving most of the state level activity.
- Ad Age reports that
 - "Adding an even greater significance (and more money) to these governors' races is the impending redistricting of U.S. House districts that will follow the 2010 census. With as many as 18 states possibly losing or gaining a U.S. House seat, governors become the single-most important power brokers in deciding their state's Congressional map. For this reason, the national political parties will raise and spend millions in these states to win or hold these offices. To illustrate this point, both the Republican and Democratic governors' associations are already reporting robust fundraising."
 - "For a road map to the most competitive races in the nation, you should look no further than the \$300 million-plus worth of issue-ad spending in 2009. The 2009 issue-ad spending related to federal issues, such as health-care reform, cap-and-trade and card check, were largely spent in states with vulnerable U.S. Senate and House incumbents. Although health-care reform is in the end-game stage on Capitol Hill, it continues to be an issue that generates millions of dollars in ad spending in these competitive federal races."
- States that will probably have the most activity include Arkansas, California, Colorado, Connecticut, Florida, Illinois, Missouri, Nevada, Ohio, New Hampshire, Pennsylvania, New York and Texas.

In addition to hotly contested races around the country, a number of other factors will increase political adspend: the tea party movement and other cause groups, the challenge of fundraising in this delicate economy, special interest groups, potential changes to the campaign finance laws, the inclusion of social media. Reporter Evan Tracy opines that "it will still be TV ads aimed at those essential independent, undecided and late-deciding voters that will benefit from the bulk of campaign media spending. Because of this, local TV, cable and radio are still the best positioned to be the ultimate dollar winners in 2010."

Positive projections for political advertising were also made by Wells Fargo Securities earlier in the Fall - forecasting \$3.3 billion this year, which is an 11 percent increase over 2008 and a 4 percent decrease from record year 2006:

- Broadcast TV = \$2.2 billion (67%)
 - Local TV = \$2 billion
 - Cable = \$150 million
 - Network TV = \$50 million
- Direct mail = \$650 million (20%)
- Radio = \$250 million (8%)
- Newspaper = \$95 million (3%)
- Outdoor = \$55 million
- Internet = \$50 million

Election Tools I and II can be found in the August 2009 and September 2009 issues. [September featured a state-by-state calendar of election dates.] ●

Source: http://adage.com/mediaworks/article?article_id=141403

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165	ABILENE-SWEETWATER	+	+	++	0	++	++	++	++
145	ALBANY, GA	-	-	0	-	--	0	0	-
57	ALBANY-SCHENECTADY-TR	0	+	0	0	0	+	+	0
44	ALBUQUERQUE-SANTA FE	+	0	-	0	0	-	0	-
179	ALEXANDRIA, LA	++	0	0	0	-	0	++	0
208	ALPENA	0	0	0	0	0	0	0	0
131	AMARILLO	0	+	0	0	++	++	+	++
150	ANCHORAGE	0	++	+	+	++	++	++	++
8	ATLANTA	0	0	0	+	0	+	0	+
114	AUGUSTA	++	++	+	++	++	+	++	++
48	AUSTIN	0	0	0	+	-	0	0	0
125	BAKERSFIELD	--	-	++	--	-	0	++	0
27	BALTIMORE	0	+	+	++	+	+	0	+
154	BANGOR	-	0	--	0	0	0	-	-
95	BATON ROUGE	0	0	+	++	0	++	0	+
141	BEAUMONT-PORT ARTHUR	+	0	-	+	0	0	0	0
189	BEND, OR	0	++	+	++	+	0	-	--
169	BILLINGS	+	+	-	+	++	+	++	++
163	BILOXI-GULFPORT	0	0	0	0	0	0	0	0
157	BINGHAMTON	-	--	++	++	+	0	++	0
40	BIRMINGHAM (ANN AND T	0	+	0	0	0	0	0	0
156	BLUEFIELD-BECKLEY-OAK	0	-	0	--	-	-	-	0
112	BOISE	+	0	++	+	++	+	++	+
7	BOSTON (MANCHESTER)	+	0	+	++	0	0	+	0
182	BOWLING GREEN	0	0	++	+	0	0	0	++
52	BUFFALO	0	+	-	+	0	0	+	0
94	BURLINGTON-PLATTSBURG	++	++	++	++	+	++	++	++
190	BUTTE-BOZEMAN	+	0	0	+	-	++	+	++
196	CASPER-RIVERTON	++	0	0	++	++	++	--	--
88	CEDAR RAPIDS-WTRLO-IW	0	0	-	+	0	0	0	0
84	CHAMPAIGN&SPRNGFLD-DE	+	++	++	++	++	++	++	+
97	CHARLESTON, SC	0	0	0	0	+	0	0	++
63	CHARLESTON-HUNTINGTON	0	+	0	0	-	-	0	0
24	CHARLOTTE	0	0	++	0	+	0	0	+
183	CHARLOTTESVILLE	--	++	0	0	0	++	0	0
86	CHATTANOOGA	0	+	0	+	0	0	0	+
197	CHEYENNE-SCOTTSBLUF	-	--	--	+	0	--	-	--
3	CHICAGO	++	+	0	+	0	++	++	0
130	CHICO-REDDING	++	0	0	-	0	0	0	+
33	CINCINNATI	0	0	0	0	0	+	0	0
168	CLARKSBURG-WESTON	-	--	--	--	-	--	--	--
18	CLEVELAND-AKRON (CANT	+	+	+	++	0	0	0	0
92	COLORADO SPRINGS-PUEB	+	+	+	0	+	+	0	0
79	COLUMBIA, SC	+	+	0	+	0	++	+	+
137	COLUMBIA-JEFFERSON CI	+	++	0	++	+	0	++	+
128	COLUMBUS, GA	+	+	0	++	++	0	+	-
34	COLUMBUS, OH	+	0	0	+	0	0	0	-
133	COLUMBUS-TUPELO-WEST	0	0	++	++	-	0	-	0
129	CORPUS CHRISTI	0	+	+	+	+	0	+	0
5	DALLAS-FT. WORTH	+	0	0	0	+	+	+	0
99	DAVENPORT-R.ISLAND-MO	++	++	++	++	++	++	++	++
65	DAYTON	0	0	0	0	-	0	0	0
16	DENVER	++	0	0	++	0	+	+	+
72	DES MOINES-AMES	0	++	++	++	+	++	++	+

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11	DETROIT	++	+	+	+	++	++	+	+
172	DOTHAN	0	0	0	+	+	0	0	0
139	DULUTH-SUPERIOR	0	++	++	++	++	++	+	--
98	EL PASO	-	0	-	+	--	0	--	--
176	ELMIRA	0	+	++	++	0	++	++	++
146	ERIE	+	0	0	++	0	+	++	+
119	EUGENE	--	-	--	-	0	0	--	0
195	EUREKA	+	--	0	--	--	0	--	0
102	EVANSVILLE	0	++	+	++	+	++	0	0
202	FAIRBANKS	0	0	0	0	0	0	0	0
121	FARGO-VALLEY CITY	0	+	++	+	0	0	++	+
68	FLINT-SAGINAW-BAY CIT	++	++	+	+	0	+	0	0
104	FLORENCE-MYRTLE BEACH	-	--	-	0	-	--	-	--
55	FRESNO-VISALIA	-	--	++	-	0	+	0	0
64	FT. MYERS-NAPLES	0	0	0	--	--	-	-	0
100	FT. SMITH-FAY-SPRNGDL	++	+	+	+	+	0	++	0
107	FT. WAYNE	+	+	++	++	+	++	++	++
160	GAINESVILLE	+	0	++	++	++	++	++	0
210	GLENDIVE	0	0	0	0	0	+	--	++
184	GRAND JUNCTION-MONTRO	0	++	0	0	++	+	0	++
41	GRAND RAPIDS-KALMZOO-	++	+	0	++	++	++	+	+
192	GREAT FALLS	0	++	+	+	++	++	+	-
70	GREEN BAY-APPLETON	0	0	-	0	-	+	-	0
46	GREENSBORO-H.POINT-W.	+	0	0	0	0	0	0	0
103	GREENVILLE-N.BERN-WAS	-	0	0	0	--	-	0	0
36	GREENVLL-SPART-ASHEVL	++	+	+	+	+	++	++	++
187	GREENWOOD-GREENVILLE	--	+	0	0	0	0	0	0
87	HARLINGEN-WSLCO-BRNSV	++	++	0	++	++	0	++	++
39	HARRISBURG-LNCSTR-LEB	+	+	0	0	0	0	0	-
178	HARRISONBURG	++	+	--	--	-	-	--	0
30	HARTFORD & NEW HAVEN	+	+	+	++	0	+	0	++
167	HATTIESBURG-LAUREL	0	++	0	++	++	0	+	0
206	HELENA	++	0	+	0	--	0	+	++
71	HONOLULU	-	0	-	+	0	0	0	0
10	HOUSTON	+	-	-	0	0	0	+	0
81	HUNTSVILLE-DECATUR (F	0	0	+	+	0	-	-	++
162	IDAHO FALLS-POCATELLO	--	0	0	+	+	++	+	0
25	INDIANAPOLIS	0	0	0	+	0	+	+	0
90	JACKSON, MS	0	-	0	0	0	+	0	0
173	JACKSON, TN	0	0	0	0	0	0	0	0
47	JACKSONVILLE	0	0	0	0	0	0	0	0
101	JOHNSTOWN-ALTOONA	++	++	++	++	++	++	0	++
181	JONESBORO	++	+	++	++	++	++	++	++
147	JOPLIN-PITTSBURG	+	0	+	++	0	++	+	-
207	JUNEAU	0	0	0	0	0	0	0	0
32	KANSAS CITY	0	++	++	0	+	+	0	+
59	KNOXVILLE	0	++	++	++	-	++	++	++
127	LA CROSSE-EAU CLAIRE	+	+	-	0	0	+	+	+
191	LAFAYETTE, IN	+	0	+	++	0	+	+	+
123	LAFAYETTE, LA	0	+	0	+	+	0	+	++
175	LAKE CHARLES	-	++	++	+	++	++	++	++
115	LANSING	0	+	0	+	0	+	0	++
188	LAREDO	++	++	++	++	++	++	++	++
42	LAS VEGAS	+	+	++	+	+	+	0	+

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62	LEXINGTON	0	++	++	+	++	+	++	0
186	LIMA	0	++	+	++	0	++	++	++
105	LINCOLN & HASTINGS-KR	+	0	-	+	0	0	-	0
56	LITTLE ROCK-PINE BLUF	++	+	0	++	0	+	0	++
2	LOS ANGELES	++	0	+	+	++	0	++	++
49	LOUISVILLE	++	+	+	0	+	+	0	+
143	LUBBOCK	+	+	+	++	++	+	+	++
122	MACON	+	0	0	0	0	++	0	+
85	MADISON	0	0	0	+	0	0	0	0
199	MANKATO	0	+	++	+	++	0	0	++
180	MARQUETTE	0	-	0	0	--	-	--	-
140	MEDFORD-KLAMATH FALLS	--	0	++	++	0	+	0	--
50	MEMPHIS	0	0	+	0	0	+	0	0
185	MERIDIAN	0	0	0	0	0	0	0	0
17	MIAMI-FT. LAUDERDALE	+	0	+	++	+	+	+	++
35	MILWAUKEE	0	+	++	0	++	++	++	+
15	MINNEAPOLIS-ST. PAUL	++	+	+	++	+	+	++	0
158	MINOT-BISMARCK-DICKIN	++	++	+	++	0	++	+	-
166	MISSOULA	0	+	0	+	-	+	++	0
60	MOBILE-PENSACOLA (FT	0	-	0	+	+	0	0	-
138	MONROE-EL DORADO	-	0	+	0	0	0	++	+
124	MONTEREY-SALINAS	0	-	++	0	+	++	++	++
118	MONTGOMERY (SELMA)	-	-	++	0	-	-	++	-
29	NASHVILLE	+	+	+	+	+	++	+	0
51	NEW ORLEANS	+	+	0	++	0	+	++	0
1	NEW YORK	++	+	+	+	+	+	+	0
43	NORFOLK-PORTSMTH-NEWP	0	0	0	0	0	0	0	0
209	NORTH PLATTE	0	--	0	++	-	+	++	0
155	ODESSA-MIDLAND	++	++	--	++	++	++	0	++
45	OKLAHOMA CITY	0	-	0	+	0	+	++	0
76	OMAHA	+	+	+	0	0	+	0	+
19	ORLANDO-DAYTONA BCH-M	0	+	0	++	0	++	++	+
200	OTTUMWA-KIRKSVILLE	++	++	--	0	0	+	+	0
78	PADUCAH-C.GIRD-HARBG-	0	-	0	0	-	++	+	0
142	PALM SPRINGS	0	++	++	++	+	+	0	0
151	PANAMA CITY	++	-	-	-	++	0	--	--
194	PARKERSBURG	0	0	0	0	0	0	0	0
116	PEORIA-BLOOMINGTON	++	++	++	0	0	0	++	++
4	PHILADELPHIA	0	0	+	+	+	+	+	+
12	PHOENIX	+	-	-	0	0	-	+	0
23	PITTSBURGH	0	0	+	0	0	0	0	--
22	PORTLAND, OR	++	+	0	+	+	++	+	0
77	PORTLAND-AUBURN	0	--	0	-	0	+	0	-
205	PRESQUE ISLE	-	++	0	++	0	+	++	++
53	PROVIDENCE-NEW BEDFOR	++	0	0	0	0	+	+	0
171	QUINCY-HANNIBAL-KEOKU	0	++	++	++	++	++	0	++
26	RALEIGH-DURHAM (FAYET	+	++	+	+	0	++	++	++
174	RAPID CITY	+	++	++	+	0	++	0	--
108	RENO	0	-	0	--	--	0	-	-
58	RICHMOND-PETERSBURG	0	0	0	0	0	0	0	0
67	ROANOKE-LYNCHBURG	0	0	+	-	--	0	-	-



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80	ROCHESTER, NY	0	0	0	+	+	+	+	0
153	ROCHESTR-MASON CITY-A	++	+	++	++	+	++	++	+
134	ROCKFORD	++	+	+	++	+	++	++	++
20	SACRAMNTO-STKTON-MODE	+	-	0	+	0	+	++	+
144	SALISBURY	0	0	0	0	0	0	0	0
31	SALT LAKE CITY	+	0	0	0	+	0	0	0
198	SAN ANGELO	++	++	++	+	+	++	++	+
37	SAN ANTONIO	+	0	0	+	0	++	+	0
28	SAN DIEGO	++	0	0	+	+	0	+	0
6	SAN FRANCISCO-OAK-SAN	++	0	0	+	+	0	++	+
120	SANTABARBRA-SANMAR-SA	++	++	++	0	0	0	0	-
96	SAVANNAH	0	0	0	+	0	+	+	-
13	SEATTLE-TACOMA	++	0	++	++	++	++	+	+
161	SHERMAN-ADA	--	--	--	--	--	-	--	--
82	SHREVEPORT	0	0	+	+	-	++	0	+
148	SIOUX CITY	0	0	0	+	-	0	++	-
113	SIOUX FALLS(MITCHELL)	0	++	++	0	0	0	++	0
91	SOUTH BEND-ELKHART	0	++	+	+	+	++	0	++
75	SPOKANE	+	0	0	0	0	0	+	++
74	SPRINGFIELD, MO	+	0	0	++	0	++	0	+
111	SPRINGFIELD-HOLYOKE	0	0	0	++	0	0	0	0
201	ST. JOSEPH	++	++	0	0	--	++	0	0
21	ST. LOUIS	++	0	+	0	0	+	++	0
83	SYRACUSE	+	0	+	++	+	++	++	+
106	TALLAHASSEE-THOMASVIL	+	+	++	+	0	+	+	0
14	TAMPA-ST. PETE (SARAS	0	+	0	0	0	+	0	0
152	TERRE HAUTE	+	++	++	+	++	++	+	0
73	TOLEDO	0	0	-	0	0	0	-	0
136	TOPEKA	+	++	+	++	+	0	+	++
117	TRAVERSE CITY-CADILLA	++	-	++	+	++	++	++	++
93	TRI-CITIES, TN-VA	0	0	0	+	++	++	++	++
66	TUCSON (SIERRA VISTA)	0	0	+	0	0	0	0	0
61	TULSA	0	+	++	+	++	++	0	++
193	TWIN FALLS	++	++	++	++	++	++	++	++
109	TYLER-LONGVIEW(LFKN&N	0	0	0	0	0	0	0	0
170	UTICA	0	--	++	++	+	0	++	+
204	VICTORIA	0	++	++	++	++	++	++	++
89	WACO-TEMPLE-BRYAN	0	+	0	0	0	0	++	+
9	WASHINGTON, DC (HAGRS	++	+	++	++	++	++	+	++
177	WATERTOWN	+	++	++	+	0	++	++	0
135	WAUSAU-RHINELANDER	-	0	--	--	-	-	--	--
38	WEST PALM BEACH-FT. P	++	++	++	++	++	+	0	0
159	WHEELING-STEUBENVILLE	--	0	--	--	--	-	--	--
149	WICHITA FALLS & LAWTO	0	++	+	++	-	++	0	0
69	WICHITA-HUTCHINSON PL	0	0	0	+	0	+	+	0
54	WILKES BARRE-SCRANTON	+	++	++	++	0	++	+	-
132	WILMINGTON	-	--	--	+	0	--	+	0
126	YAKIMA-PASCO-RCHLND-K	0	0	-	+	+	0	0	+
110	YOUNGSTOWN	0	+	+	0	0	0	0	0
164	YUMA-EL CENTRO	-	--	+	+	0	-	0	--
203	ZANESVILLE	-	--	-	0	--	--	-	-



DO YOU KNOW SQAD?

The Back Page is Now the Place for Tips, Tools, Training and the Inside Scoop on SQAD

As Neil mentioned on the cover page, we're adding new features to our newsletter and other communication vehicles in 2010. In the coming months, we'll focus on ways to make your job easier – tips, shortcuts and other tools. Stay tuned to this space – and please send any suggestions or requests to newsletter@sqad.com!

SQAD on the Road

ANA TV & Everything Video

February 11 – Marriott Marquis
New York

TV and video continue to present great opportunities to advertisers. Overall television viewership is at an all-time high as the average U.S. viewer watches 4 hours and 49 minutes of television per day-up 20 percent from a decade ago, according to Nielsen. The trade press reports that television is reaping the greatest benefits of an improved advertising market due to stronger-than-expected demand. There are exciting developments in technology, including mass availability of addressable TV.

NYC Bowling for Breast Cancer

February 11, 6-10PM – Lucky Strike Lanes & Lounge
New York

SQAD is joining MediaVest, Razorfish, Zenith, P&G, Turner Broadcasting, Campbell's and many other industry leaders to raise money for breastcancer.org, which reaches millions of people worldwide, supplying medical information and community support.

Let's hope one of the SQAD keglers can hit a five-bagger to help hit the goal of \$400,000! [Translation: Let's hope one of the SQAD bowlers can hit *five strikes in a row* for the cause!]

2010 SQAD Spot Data Release Dates Available at www.sqad.com

If you're trying to plan your research with the most current SQAD spot data, you can always check www.sqad.com/products/schedule.html for specific release dates.

For January:

- Spot TV released January 5
- Hispanic Spot TV Plus January 12
- Spot Radio January 20

In general:

- Spot TV: released the first week each month.
- Hispanic Spot TV Plus: released the second week of each month.
- Spot Radio: released the third week of each month.
- Media Market Guide (MMG) National: projections released quarterly.

Coming in February's SQAD Monthly

- Help us help you with training, analysis and information needs with the annual SQAD newsletter and blog survey. We appreciate your input!
- More about WebCosts Online, coming Q1.
- Meet the Team – a new feature!

Section 2: RESEARCH UPDATE: SQAD Radio CPMs in Arbitron PPM Markets

Since the launch of the new "Do You Know SQAD" web site, we're updating the Arbitron PPM data for 2009, continuing into 2010, in the SQAD Monthly newsletter.

Past issues are available at www.sqad.com/newsletter.

If you require additional information, please contact your SQAD representative.

Did You Know?

SQAD Spot Radio has been the standard cost metric for this medium since 2002.

Who's on first?

The question of the 'first' publicly-targeted licensed radio station in the U.S. has more than one answer and depends on semantics. Settlement of this 'first' question may hang largely upon what constitutes 'regular' programming.

- October 1920: Most commonly attributed to **KDKA in Pittsburgh PA.**
- February 1919: station 9XM at the **University of Wisconsin in Madison.** That station is still on the air today as **WHA.**
- August 1920: **E.W. Scripps's WBL (now WWJ) in Detroit** started broadcasting and has carried a regular schedule of programming to the present.
- 1909: **Charles David Herrold's** radio services (eventually **KCBS**) began.

~ source: Wikipedia

Late breaking news...from the Consumer Electronics Show – Automakers expand HD Radio offerings

According to *Inside Radio* (1/7/10): Ford, Hyundai, Kia, Lincoln and Volkswagen used opening day of the 2010 Consumer Electronics Show to announce that they will build HD Radio into select models, leading iBiquity CEO Bob Struble to proclaim that "the HD Radio automotive rollout has reached critical mass."

To date, a total of 15 automakers and more than 80 vehicle lines have committed to offering factory-installed HD Radio as either standard or optional equipment.

The full story is at www.insideradio.com/Article.asp?id=1650853&spid=32060

Radio Update Key – PPM MarketTrends

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

Atlanta (12/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	--	0	-	--	--	--	--
February 2009	0	0	0	--	0	0	0
March 2009	0	0	0	0	0	0	0
April 2009	++	++	--	--	0	--	0
May 2009	++	++	-	0	0	0	0
June 2009	0	0	-	0	0	0	0
July 2009	++	++	++	++	++	++	++
August 2009	++	-	++	++	++	+	++
September 2009	++	+	++	0	++	+	+
October 2009	--	--	--	--	--	--	--
November 2009	-	--	-	-	-	-	-
December 2009	0	-	0	++	0	+	0

Baltimore (launch date 9/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
September 2009	0	0	0	0	0	0	0
October 2009	++	--	0	--	0	--	-
November 2009	++	--	++	--	0	0	0
December 2009	++	+	++	++	++	++	++

Boston (3/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
March 2009	++	++	0	--	0	-	0
April 2009	0	0	--	--	-	--	-
May 2009	+	0	-	--	0	-	0
June 2009	0	0	0	--	-	--	-
July 2009	++	++	++	+	++	++	++
August 2009	++	++	++	++	++	++	++
September 2009	++	++	+	0	++	++	++
October 2009	-	--	--	--	--	--	--
November 2009	0	--	--	--	--	--	--
December 2009	0	0	0	++	0	0	0

Chicago (9/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	0	++	++	--	+	+	+
February 2009	0	+	++	++	++	++	++
March 2009	+	++	+	++	+	++	+
April 2009	0	0	--	--	-	--	-
May 2009	-	--	--	-	--	--	--
June 2009	--	--	-	0	-	-	-
July 2009	++	0	++	+	++	+	++
August 2009	++	+	++	0	++	+	++
September 2009	+	0	++	+	+	+	+
October 2009	-	--	--	--	--	--	--
November 2009	0	-	0	--	0	-	-
December 2009	0	0	+	-	0	0	0

Dallas-Ft. Worth (9/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	--	-	--	0	--	-	--
February 2009	-	0	-	0	-	-	0
March 2009	0	+	0	0	0	0	0
April 2009	--	--	--	--	--	--	--
May 2009	0	-	-	--	-	--	-
June 2009	++	++	++	0	++	+	+
July 2009	++	++	++	++	++	++	++
August 2009	++	0	++	+	++	+	++
September 2009	++	0	+	0	+	0	+
October 2009	-	--	--	--	--	--	--
November 2009	+	--	0	--	-	--	-
December 2009	+	0	0	0	0	0	0

Denver-Boulder (9/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
September 2009	0	0	+	+	0	+	0
October 2009	++	++	++	--	+	0	0
November 2009	+	0	0	--	0	-	0
December 2009	++	-	+	-	0	0	0

Detroit (12/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	--	--	-	--	--	--	--
February 2009	+	0	0	++	+	+	+
March 2009	++	0	0	0	0	0	0
April 2009	++	++	-	0	++	0	+
May 2009	++	++	+	0	+	0	+
June 2009	++	++	0	++	++	++	++
July 2009	--	--	-	--	--	--	--
August 2009	0	-	--	--	-	--	--
September 2009	0	0	--	++	0	0	0
October 2009	0	--	+	--	-	--	--
November 2009	++	0	+	--	0	--	0
December 2009	+	0	+	--	0	-	0

Houston (6/07) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	--	--	++	++	0	+	0
February 2009	0	++	++	+	++	++	++
March 2009	0	-	0	--	0	-	-
April 2009	--	--	--	--	--	--	--
May 2009	--	--	--	--	--	--	--
June 2009	+	++	--	0	0	0	0
July 2009	++	++	++	++	++	++	++
August 2009	++	+	++	++	++	++	++
September 2009	++	+	++	--	++	0	++
October 2009	--	--	--	++	--	-	--
November 2009	-	-	-	-	-	-	-
December 2009	0	0	0	--	0	--	0

Los Angeles (9/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	++	++	++	++	++	++	++
February 2009	-	0	0	++	0	+	0
March 2009	+	0	0	+	0	0	0
April 2009	--	--	--	--	--	--	--
May 2009	--	--	--	--	--	--	--
June 2009	--	0	--	--	--	--	--
July 2009	+	--	0	--	-	--	-
August 2009	++	++	++	-	++	+	++
September 2009	++	++	++	++	++	++	++
October 2009	-	--	--	--	--	--	--
November 2009	0	--	0	-	0	-	0
December 2009	0	-	0	0	0	0	0

Miami-Ft. Lauderdale-Hollywood (6/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
June 2009	-	-	--	--	--	--	-
July 2009	+	0	+	0	0	0	0
August 2009	+	0	0	0	0	0	0
September 2009	++	+	0	0	+	0	0
October 2009	0	--	-	+	0	-	0
November 2009	++	++	+	0	+	0	+
December 2009	0	0	0	0	0	0	0

Middlesex-Somerset (9/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	++	++	++	++	++	++	++
February 2009	--	0	++	--	0	+	0
March 2009	++	++	+	++	++	++	++
April 2009	--	--	--	--	--	--	--
May 2009	--	--	--	--	--	--	--
June 2009	--	0	--	--	--	--	--
July 2009	--	--	--	--	--	--	--
August 2009	--	++	--	-	0	0	0
September 2009	-	++	--	0	0	0	0
October 2009	++	0	--	0	0	-	0
November 2009	++	++	++	--	++	++	++
December 2009	++	++	++	--	++	++	++

Minneapolis-St. Paul (6/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
June 2009	++	0	+	--	0	0	0
July 2009	--	0	0	-	--	-	-
August 2009	0	0	0	0	0	0	0
September 2009	+	0	0	--	0	-	0
October 2009	+	++	0	0	+	0	0
November 2009	++	++	+	-	+	0	+
December 2009	+	0	+	--	0	-	0

Nassau-Suffolk (9/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	-	++	--	0	0	0	0
February 2009	++	++	++	++	++	++	++
March 2009	+	0	0	0	0	0	0
April 2009	--	--	--	--	--	--	--
May 2009	--	--	--	--	--	--	--
June 2009	-	++	--	--	-	--	-
July 2009	--	--	++	++	--	0	--
August 2009	--	-	-	0	-	0	0
September 2009	-	+	0	--	-	--	--
October 2009	0	++	0	0	+	+	+
November 2009	++	-	++	0	0	0	0
December 2009	++	-	+	0	0	0	0

New York (9/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	--	++	+	--	0	0	0
February 2009	-	-	+	+	0	0	0
March 2009	-	+	+	--	0	0	0
April 2009	--	0	--	-	--	-	--
May 2009	--	--	--	--	--	--	--
June 2009	-	-	-	0	-	-	-
July 2009	++	--	--	--	--	--	--
August 2009	++	++	++	-	++	+	++
September 2009	++	++	++	0	++	++	++
October 2009	0	--	--	--	--	--	--
November 2009	0	--	-	--	-	--	-
December 2009	+	+	0	++	0	0	0

Philadelphia (3/07) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	--	0	0	0	--	0	-
February 2009	0	++	++	++	+	++	++
March 2009	0	-	0	++	+	++	+
April 2009	--	0	--	0	--	-	--
May 2009	-	0	-	-	-	-	-
June 2009	0	0	0	--	-	-	-
July 2009	++	+	++	++	++	++	++
August 2009	++	++	++	++	++	++	++
September 2009	++	+	0	++	++	++	++
October 2009	-	--	-	--	--	--	--
November 2009	0	--	-	--	-	--	-
December 2009	+	0	0	--	0	-	0

Phoenix (6/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
June 2009	-	0	+	++	0	+	0
July 2009	--	--	0	0	--	0	--
August 2009	-	-	0	0	0	0	0
September 2009	++	0	-	--	0	--	-
October 2009	++	++	+	--	++	0	+
November 2009	++	++	+	--	+	0	+
December 2009	0	0	0	0	0	0	0

Pittsburgh PA (9/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
September 2009	-	-	0	-	-	0	0
October 2009	++	0	0	--	0	-	0
November 2009	+	0	0	-	0	-	0
December 2009	++	0	0	+	0	0	+

Riverside-San Bernadino (9/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	++	++	++	--	++	++	++
February 2009	++	++	++	+	++	++	++
March 2009	++	++	++	++	++	++	++
April 2009	++	++	-	++	++	++	++
May 2009	++	++	++	++	++	++	++
June 2009	+	++	+	++	++	++	++
July 2009	--	0	--	++	0	0	0
August 2009	0	0	+	++	+	++	+
September 2009	-	-	0	--	-	--	-
October 2009	+	-	0	--	-	--	-
November 2009	++	+	++	--	+	0	+
December 2009	++	0	0	--	-	--	-

San Diego (6/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
June 2009	0	0	0	--	0	-	-
July 2009	--	--	0	--	--	--	--
August 2009	-	--	--	--	--	--	--
September 2009	++	+	-	--	+	-	0
October 2009	++	++	++	--	+	0	+
November 2009	++	++	++	--	++	+	++
December 2009	++	+	+	-	+	0	+

San Francisco (9/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	++	++	++	+	++	++	++
February 2009	--	-	0	0	-	0	-
March 2009	0	+	0	+	0	0	0
April 2009	--	--	--	--	--	--	--
May 2009	-	0	--	-	-	-	-
June 2009	0	0	0	+	0	0	0
July 2009	++	-	++	++	++	++	++
August 2009	++	0	++	++	++	++	++
September 2009	++	0	0	+	0	0	0
October 2009	-	-	--	--	--	--	--
November 2009	0	+	0	--	0	-	0
December 2009	0	0	0	--	0	0	0

San Jose (9/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	++	++	0	--	++	-	+
February 2009	++	++	0	++	++	+	++
March 2009	++	++	0	--	+	0	+
April 2009	0	--	-	--	-	--	-
May 2009	0	0	0	0	0	0	0
June 2009	0	0	0	0	0	0	0
July 2009	+	++	+	+	+	+	+
August 2009	-	--	-	--	--	--	--
September 2009	--	--	0	--	--	--	--
October 2009	--	--	--	++	--	--	--
November 2009	-	-	0	++	-	0	0
December 2009	0	0	0	+	0	0	0

Seattle-Tacoma (6/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
June 2009	0	0	+	+	+	0	+
July 2009	--	0	0	0	-	0	0
August 2009	0	0	0	+	0	0	0
September 2009	0	0	0	-	0	0	0
October 2009	++	++	++	--	++	0	+
November 2009	++	++	0	--	+	0	+
December 2009	0	0	-	-	0	-	0

St. Louis (9/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
September 2009	0	0	0	-	0	-	0
October 2009	--	--	0	--	--	--	--
November 2009	++	+	0	--	0	--	0
December 2009	+	0	-	--	0	--	0

Tampa-St. Petersburg-Clearwater (9/09) Radio MarketTrends

Survey	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
September 2009	++	0	+	++	+	+	++
October 2009	++	--	--	--	-	--	--
November 2009	+	0	-	++	+	++	+
December 2009	--	+	++	++	+	++	++

Washington DC (12/08) Radio MarketTrends

Market (launch date)	AMDRV	DAY	PMDRV	EVE	MFAVG	WKND	MSAVG
January 2009	--	++	-	--	0	-	-
February 2009	--	+	0	++	0	++	0
March 2009	+	++	+	0	+	+	+
April 2009	++	0	0	++	+	+	+
May 2009	++	0	0	++	+	0	0
June 2009	+	+	0	+	0	+	0
July 2009	++	0	0	++	++	+	++
August 2009	++	+	+	++	++	+	++
September 2009	++	0	++	0	+	0	0
October 2009	0	0	+	++	0	+	0
November 2009	0	0	0	+	0	0	0
December 2009	+	0	+	0	0	0	0