

SQAD MONTHLY

2009
JANUARY
VOLUME 12
ISSUE 1
\$7.00

SQAD MARKET INDICATORS

TV SMI January 2009

| DP | Mkts | Mkts | Mkts | Mkts | Mkts | SMI |
|-----|------|------|------|------|------|------|
| | ++ | + | 0 | - | -- | |
| EM | 7 | 14 | 64 | 49 | 76 | 0.66 |
| DAY | 21 | 22 | 90 | 44 | 33 | 0.94 |
| EF | 14 | 24 | 85 | 46 | 41 | 0.86 |
| EN | 17 | 17 | 72 | 43 | 61 | 0.77 |
| PA | 16 | 15 | 81 | 54 | 44 | 0.86 |
| PR | 20 | 21 | 86 | 47 | 36 | 0.92 |
| LN | 17 | 14 | 88 | 51 | 40 | 0.88 |
| LF | 19 | 21 | 74 | 41 | 55 | 0.81 |

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 December 2008

| DP | Mkts | Mkts | Mkts | Mkts | Mkts | SMI |
|-----|------|------|------|------|------|-------|
| | ++ | + | 0 | - | -- | |
| EM | 5 | 0 | 8 | 2 | 4 | 1.067 |
| DAY | 4 | 0 | 7 | 1 | 7 | 0.813 |
| EF | 5 | 1 | 9 | 2 | 2 | 1.200 |
| EN | 3 | 3 | 9 | 1 | 3 | 1.000 |
| PR | 1 | 2 | 12 | 3 | 1 | 1.000 |
| LN | 3 | 1 | 8 | 4 | 3 | 1.000 |

CEO letter:

How SQAD Can Help in This Recession

Dear Customers –

As we all pay heed to the economic environment, one wonders how serious the recession will be – and what the impact on the advertising industry will be. Recently Brad Johnson, *Advertising Age*, reported that U.S. measured ad spending turned south in the second quarter, falling 3.7% vs. a year earlier in the sharpest quarterly drop since 2001. Employment in the ad industry has dropped by 52,000 since hitting its peak in November 2007. Whether we will see possible relief in mid-2009 is yet unknown.

There are a number of advertising forecasts in the market, and this issue is devoted to looking at a cross-section of them. As the forecasters continue to predict 2009, the SQAD databases will be a barometer of what's happening. We'll be continually watching the costs being paid in the marketplace, and will share some of these views with you during 2009.

In addition to providing these market analyses during the year, here's what we at SQAD will also be doing to help:

- NetCosts, the largest and only aggregated source of real cost C3 CPMs in the industry, provides the insights to understand the national television marketplace. As we reported in the December issue, in 4th quarter, December appeared to be very soft in all dayparts, particularly for the broadcast networks. Barring an economic turnaround, we expect the current market softness to continue at least through the third quarter of 2009.
- Thanks to all of our beta contributors, WebCosts made great progress in 2008. Given the growth and current size of our WebCosts contributor data pool, we are now seeing a semblance of actual market pricing for many leading websites and ad networks. Development goes on as we continue to grow our contributor base. We are eagerly anticipating crossing the threshold from development to a commercial WebCosts in 2009.
- With the help of several key ahaa agencies, in 2008 we focused on making SQAD Hispanic TV more robust, and an expanded, more accurate SQAD Hispanic TV will be released in the second quarter.
- An upgrade for DATAVue, which will include a new single market report for stations, as well as an additional fourth dimension (i.e., sub-subrows) to create even more specific analyses, will be available later this year.
- With the acquisition of WRAP last spring, SQAD's WRAP offerings will continue to improve and expand.
- We will redesign our website so that it is more useful – supplying blogs and other types of communication and more ongoing market analyses to monitor the volatile ad markets. Also on the current and new site, we will continue to provide CPP change monitoring for the first 14 PPM radio markets.
- SQAD rate cards will remain the same as they have been in 2008.

Our continued goal is to provide you the transparency you need and the best data to help you travel through these tumultuous times.

From the SQAD Team to all of you, thank you for your continued business and support. We extend to you our very best wishes for a Happy, Healthy and Successful 2009!

Neil Klar
 President & CEO
 SQAD Inc.

INSIDE: ■ How SQAD Can Help in the Recession ■ Inside SQAD:
 ■ 2009 Media Forecast Shootout
 ■ 2009 Web View

What do you think 2009 Looks Like?
 WebCosts Update
 SQAD on the Road in '09

ROUTE TO: _____

What do you think 2009 looks like?

We'd love to hear your thoughts – and what you see happening at your company. There's a link in the cover email to participate in our short poll. A sneak peak at the three questions appears on the back page – "Inside SQAD."

2009 Media Forecast Shootout

As we all read in the December 19th issue of *Mediaweek*, Anthony Crupi reported that Barclays Capital warned investors of a 10% decrease in the advertising industry. "The most dire near-term forecast" puts the U.S. ad industry at \$252.1 billion this year (2009), which is down \$280 million from 2007. This reflects another downward adjustment from their October estimates, stating adspend would be off 5.5 percent. Only the Internet was projected to increase; Barclay's predicted a 6.1 percent growth to \$25.1B, while other media are forecasted to see losses:

- Local media: -12.2% to \$99.2B
- National media: - 8.4% to \$152.9B
- Four TV nets: -10.0% to \$14.5B
- National cable: - 2.9% to \$20.2B
- Magazine: -15.0% to \$10.8B
- Newspaper: -17.0% to \$28.7B
- Radio: -13.0% from a prior estimate of 7.4%

Crupi indicated "While next year looks to be as bleak as any in recent memory, Barclays did hold out hope for a rebound in 2010, forecasting 1 percent year-to-year growth. Cable and online are expected to lead the resurgence, with projected growth of 5 percent and 12 percent, respectively."

As a point of reference, we also looked at the current estimates from both Bob Coen, Senior Vice President, Director of Forecasting, Magna, and Jack Myers, President, Jack Myers Media Services LLC. The two forecasters line up fairly close on all media except Internet and Direct Mail, which may also be due partially to methodological and/or categorization differences:

| 2009 U.S. Adspend Forecast (\$000,000) | | |
|--|--------------------|------------|
| | Robert Coen, Magna | Jack Myers |
| Four TV networks | \$15,934 | \$17,633 |
| Local & National Spot TV | \$20,948 | \$22,989 |
| Cable TV (national & local) | \$21,654 | \$24,312 |
| Syndication TV | \$3,631 | \$3,193 |
| National (net, spot)+local radio | \$16,463 | \$17,606 |
| Consumer Magazines | \$12,053 | \$11,025 |
| Local & national newspaper | \$31,612 | \$32,675 |
| National & local yellow pages | \$13,195 | \$10,617 |
| Internet | \$11,940 | \$25,297 |
| Direct mail | \$58,430 | \$164,973 |
| TOTAL | \$205,860 | \$330,320 |

The *Wall Street Journal* and *MediaDailyNews* cited US and Worldwide forecasts from two major agencies: Zenith-Optimedia predicts the U.S. adspend to come in at \$161B while GroupM's calculation puts ad dollars at 157B.

Most forecasts indicate growth in the Internet sector, and key points were summarized by Christopher Weiss, Director of Marketing, LucidMedia. "If all news seems bad lately, then I

may have some good news for ad networking and the interactive industry. The New Year is rapidly approaching and 2009 has the potential to be a banner year (pun intended). You say we're approaching single digit growth for the first time in years? You say that the banner ad is dead? You say marketing budgets are flat? You say everyone is in a wait-and-see stance? It all may be valid, but there are also some signs that indicate 2009 will be a great year for online advertising." Here's why Weiss feels bullish on banners:

- Real change is usually driven out of necessity and hardship.
- Several technological forces have been gradually maturing — and their combination has the potential to revolutionize how advertising is done online.
- It all starts, and ends, with the user experience.

Social media is forecast to grow, based on a study done by Junta42 and reported by Gavin O'Malley in *MediaPost* (12/29/08). "Notably, surveyed marketers were very clear that social media will be at the top of their investment list next year. In terms of most important products/tactics, social media--other than blogs--resonated with 68% of subscribers, followed by e-newsletters/email (60%), blogs (56%), case studies (55%), online video (51%), white papers (46%) and microsites (43%)."

We'd love to hear what you think. Please take our poll between now and January 14th, and we'll report those findings in our February issue. More information is available on the back page (Inside SQAD). ●

| ZenithOptimedia | | 2008 | 2009 |
|-----------------|-----------|-------|-------|
| | U.S. | -3.8% | -6.2% |
| | Worldwide | +1.3% | -0.2% |
| GroupM | | | |
| | U.S. | +0.3% | -3.2% |
| | Worldwide | +2.6% | -0.2% |

2009 Web View

SQAD WebCosts at the iMedia Conference

Tom Adams, Director - WebCosts attended the iMedia Agency Summit December 7-10th at La Quinta, CA. The iMedia Agency Summit, an invitation-only event, provides a unique mix of agency media professionals (buy side) with publisher and digital advertising vendor experts (sell side) for two days of important listening and intense networking.

Two keynote speakers set the discussion agenda for the event: Don Epperson, CEO of Havas Digital, and Tim Hanlon, EVP and Managing Director, of VivaKi Ventures, the digital services hub for Publicis Groupe.

Mr. Epperson addressed the new agency business model and how it will be influenced by the ad networks and publisher methods that have evolved optimization and capabilities to manage large-scale databases. This is not so far-fetched, given that the web has allowed for unprecedented targeting opportunities.

Gretchen Hyman, Executive Editor of iMedia Communications, summarized Epperson's comments:

Havas vision: Future agency model

- Think of our agencies as a network of brands.
- Think of our brands as many networks of unique users.
- Think of our unique users as individuals to be aggregated.
- Think of our agencies as audience aggregators.
- Realize that data, insight and ultimately intelligence about a unique user is where we're heading.
- Realize that as a trusted partner of advertisers, agencies have a unique source of intelligence that will help us value each and every impression.

"The agency of the future will act very much like the large and sophisticated ad networks of today, and those agencies that hold a firm stake in tomorrow's digital future will be those with the most reach and data, as well as a common language with publishers. To put it simply, the survival of the fittest will require a mind and business model shift from valuing the quantity of conversions to valuing the quality of conversions."

Epperson said that the fundamentals of how agencies buy and value media are changing dramatically. This growth, in large part, is being influenced by the strategies and methods used by publishers and ad networks, which are teaching agencies about optimization, how to use sophisticated algorithms, how to manage large-scale databases, and how to match the right creative to the right channel.

In many ways, the road to digital's future leads to the simple goal of more efficiently integrating client and agency data, getting a more robust view of what is needed, getting immersed in analytics, and developing a more finite strategy for clients. Key elements in this change include working more directly with the publishers, tapping into their rich databases, and shifting away from the placement level to the impression level.

"We want to think of our agencies as audience aggregators," Epperson said. "Realizing data and insight about the unique user is where we're headed."

According to Ms. Hyman, Tim Hanlon "foresees a radical collision between the traditional marketing process and performance jockeys, and a major shift will need to occur for agencies to remain relevant."

Hanlon emphasized that performance marketing is here to stay and pointed to measurement, data and analytics as critical areas of change agencies need to focus on immediately to keep pace with the digital marketplace and the pulse of online. "In today's world, you have audiences who are consuming and sharing and mashing up in ways we can't ascribe to," Hanlon said. "We may be chasing a dog a miles ahead of us... You've got to boldly embrace new forms of measurement. What's happening out there is far more sophisticated than we are."

Complete summaries of both Epperson's and Hanlon's remarks can be found at: www.imediaconnection.com/summits/coverage/21289.asp and www.imediaconnection.com/summits/coverage/21389.asp ●

VivaKi Ventures: Modern Agency Pointers

- Transparency
- Open platforms
- Lower barriers to entry
- Everyone is accountable
- Goodbye agency black box
- Media no longer (exclusive) middlemen
- People directly in control

How to Revise the Agency Approach

- Measurement, data, analytics
- Performance-based ad messaging: CPM + CPA = ?
- Data-driven creative
- Long-tail, self-serve marketing
- Consumer-driven communication and content
- R.I.P. Big Media
- R.I.P. Big Agencies

Spot TV MarketTrend Report - January 2009 Input Compared to December 2008 SQAD Issue – First Quarter 2009

| <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> |
|-------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 165 | ABILENE-SWEETWATER | + | ++ | 0 | 0 | + | ++ | 0 | 0 |
| 147 | ALBANY, GA | 0 | 0 | + | ++ | ++ | 0 | + | - |
| 57 | ALBANY-SCHENECTADY-TR | - | - | 0 | - | -- | -- | - | -- |
| 44 | ALBUQUERQUE-SANTA FE | -- | + | -- | 0 | - | - | - | -- |
| 179 | ALEXANDRIA, LA | 0 | 0 | - | + | + | 0 | 0 | + |
| 208 | ALPENA | ++ | ++ | ++ | ++ | ++ | ++ | ++ | ++ |
| 131 | AMARILLO | + | + | -- | + | 0 | - | + | 0 |
| 150 | ANCHORAGE | 0 | + | + | 0 | -- | ++ | ++ | 0 |
| 8 | ATLANTA | -- | ++ | + | -- | 0 | 0 | - | 0 |
| 115 | AUGUSTA | -- | -- | 0 | -- | 0 | 0 | -- | - |
| 49 | AUSTIN | - | - | - | 0 | - | -- | 0 | - |
| 125 | BAKERSFIELD | + | 0 | ++ | ++ | ++ | 0 | 0 | + |
| 26 | BALTIMORE | 0 | 0 | 0 | 0 | -- | - | - | 0 |
| 153 | BANGOR | - | 0 | -- | 0 | - | - | 0 | 0 |
| 95 | BATON ROUGE | 0 | 0 | 0 | 0 | 0 | + | 0 | 0 |
| 141 | BEAUMONT-PORT ARTHUR | 0 | - | 0 | 0 | -- | 0 | 0 | + |
| 192 | BEND, OR | -- | -- | -- | -- | -- | -- | -- | 0 |
| 170 | BILLINGS | - | + | 0 | + | 0 | 0 | + | ++ |
| 163 | BILOXI-GULFPORT | ++ | 0 | 0 | + | + | 0 | 0 | 0 |
| 157 | BINGHAMTON | -- | 0 | 0 | - | 0 | -- | 0 | 0 |
| 40 | BIRMINGHAM (ANN AND T | - | - | 0 | 0 | - | 0 | - | - |
| 155 | BLUEFIELD-BECKLEY-OAK | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 112 | BOISE | 0 | 0 | 0 | 0 | 0 | - | 0 | - |
| 7 | BOSTON (MANCHESTER) | - | 0 | 0 | -- | - | 0 | 0 | 0 |
| 182 | BOWLING GREEN | + | + | ++ | 0 | + | + | + | 0 |
| 51 | BUFFALO | 0 | ++ | ++ | 0 | 0 | ++ | 0 | ++ |
| 93 | BURLINGTON-PLATTSBURG | -- | 0 | ++ | ++ | - | + | ++ | ++ |
| 190 | BUTTE-BOZEMAN | 0 | 0 | 0 | 0 | ++ | -- | 0 | -- |
| 197 | CASPER-RIVERTON | 0 | - | -- | 0 | -- | ++ | -- | -- |
| 88 | CEDAR RAPIDS-WTRLO-IW | -- | -- | -- | -- | -- | -- | 0 | -- |
| 83 | CHAMPAIGN&SPRNGFLD-DE | -- | 0 | 0 | 0 | - | + | - | -- |
| 99 | CHARLESTON, SC | 0 | ++ | ++ | - | - | + | + | + |
| 65 | CHARLESTON-HUNTINGTON | + | 0 | - | 0 | 0 | 0 | 0 | - |
| 24 | CHARLOTTE | -- | -- | - | -- | - | - | - | - |
| 183 | CHARLOTTESVILLE | -- | ++ | + | + | ++ | 0 | 0 | -- |
| 86 | CHATTANOOGA | 0 | - | 0 | ++ | 0 | -- | - | -- |
| 198 | CHEYENNE-SCOTTSBLUF | -- | + | + | + | ++ | 0 | + | ++ |
| 3 | CHICAGO | 0 | ++ | 0 | -- | 0 | 0 | 0 | - |
| 130 | CHICO-REDDING | - | -- | -- | 0 | -- | -- | - | - |
| 34 | CINCINNATI | -- | - | - | -- | -- | -- | -- | - |
| 168 | CLARKSBURG-WESTON | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 17 | CLEVELAND-AKRON (CANT | -- | 0 | - | -- | -- | -- | - | -- |
| 91 | COLORADO SPRINGS-PUEB | -- | - | - | -- | -- | - | 0 | 0 |
| 79 | COLUMBIA, SC | -- | - | 0 | -- | 0 | 0 | - | -- |
| 137 | COLUMBIA-JEFFERSON CI | -- | - | - | - | 0 | -- | 0 | -- |
| 128 | COLUMBUS, GA | - | 0 | - | 0 | - | - | 0 | -- |
| 32 | COLUMBUS, OH | -- | -- | -- | -- | -- | - | -- | -- |
| 133 | COLUMBUS-TUPELO-WEST | -- | -- | -- | -- | -- | - | -- | -- |
| 129 | CORPUS CHRISTI | - | 0 | 0 | 0 | + | 0 | 0 | ++ |
| 5 | DALLAS-FT. WORTH | - | 0 | 0 | -- | - | - | - | - |
| 97 | DAVENPORT-R.ISLAND-MO | - | 0 | -- | 0 | - | -- | - | - |
| 64 | DAYTON | - | -- | 0 | -- | - | - | -- | 0 |
| 18 | DENVER | 0 | 0 | 0 | - | + | ++ | + | + |
| 71 | DES MOINES-AMES | 0 | + | 0 | 0 | 0 | 0 | 0 | 0 |

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|-------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 11 | DETROIT | - | -- | - | -- | - | - | - | + |
| 172 | DOTHAN | - | - | - | 0 | 0 | 0 | ++ | 0 |
| 139 | DULUTH-SUPERIOR | -- | 0 | -- | -- | 0 | - | -- | -- |
| 98 | EL PASO | 0 | 0 | -- | -- | 0 | + | -- | 0 |
| 175 | ELMIRA | -- | - | 0 | -- | 0 | - | 0 | - |
| 146 | ERIE | - | - | -- | -- | -- | -- | -- | -- |
| 119 | EUGENE | + | ++ | ++ | ++ | + | ++ | 0 | - |
| 195 | EUREKA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 102 | EVANSVILLE | - | 0 | - | -- | - | - | -- | -- |
| 202 | FAIRBANKS | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 120 | FARGO-VALLEY CITY | -- | 0 | 0 | -- | -- | 0 | - | -- |
| 66 | FLINT-SAGINAW-BAY CIT | -- | -- | - | -- | - | + | -- | - |
| 104 | FLORENCE-MYRTLE BEACH | -- | - | - | -- | - | - | 0 | 0 |
| 55 | FRESNO-VISALIA | 0 | 0 | - | 0 | 0 | 0 | 0 | ++ |
| 62 | FT. MYERS-NAPLES | + | 0 | 0 | 0 | + | + | - | 0 |
| 100 | FT. SMITH-FAY-SPRNGDL | 0 | 0 | + | - | 0 | - | 0 | 0 |
| 107 | FT. WAYNE | -- | -- | 0 | - | - | 0 | -- | 0 |
| 160 | GAINESVILLE | -- | 0 | - | 0 | 0 | 0 | 0 | 0 |
| 210 | GLENDIVE | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 184 | GRAND JUNCTION-MONTRO | -- | -- | -- | -- | -- | 0 | -- | -- |
| 39 | GRAND RAPIDS-KALMZOO- | -- | -- | -- | - | -- | -- | - | -- |
| 191 | GREAT FALLS | ++ | 0 | -- | - | - | -- | ++ | - |
| 70 | GREEN BAY-APPLETON | -- | 0 | - | -- | -- | -- | -- | -- |
| 46 | GREENSBORO-H.POINT-W. | - | 0 | + | 0 | 0 | 0 | -- | + |
| 103 | GREENVILLE-N.BERN-WAS | 0 | 0 | + | + | + | + | 0 | 0 |
| 36 | GREENVLL-SPART-ASHEVL | 0 | - | 0 | 0 | 0 | - | 0 | - |
| 187 | GREENWOOD-GREENVILLE | -- | -- | 0 | 0 | - | - | 0 | 0 |
| 87 | HARLINGEN-WSLCO-BRNSV | + | - | + | ++ | 0 | -- | ++ | 0 |
| 41 | HARRISBURG-LNCSTR-LEB | 0 | 0 | + | 0 | 0 | 0 | - | 0 |
| 178 | HARRISONBURG | -- | -- | - | 0 | - | - | 0 | - |
| 30 | HARTFORD & NEW HAVEN | - | - | 0 | -- | 0 | 0 | 0 | 0 |
| 167 | HATTIESBURG-LAUREL | -- | 0 | 0 | -- | ++ | + | 0 | + |
| 206 | HELENA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 72 | HONOLULU | ++ | ++ | ++ | ++ | ++ | ++ | 0 | + |
| 10 | HOUSTON | -- | 0 | + | -- | - | 0 | 0 | 0 |
| 82 | HUNTSVILLE-DECATUR (F | -- | -- | 0 | - | -- | 0 | -- | -- |
| 162 | IDAHO FALLS-POCATELLO | -- | 0 | - | 0 | - | -- | ++ | 0 |
| 25 | INDIANAPOLIS | 0 | 0 | 0 | 0 | 0 | 0 | 0 | - |
| 90 | JACKSON, MS | -- | - | - | - | - | -- | -- | -- |
| 173 | JACKSON, TN | -- | + | ++ | ++ | ++ | ++ | 0 | - |
| 47 | JACKSONVILLE | 0 | 0 | 0 | + | 0 | 0 | 0 | 0 |
| 101 | JOHNSTOWN-ALTOONA | -- | 0 | 0 | - | -- | + | ++ | 0 |
| 181 | JONESBORO | 0 | + | - | - | - | 0 | ++ | - |
| 148 | JOPLIN-PITTSBURG | -- | -- | -- | 0 | -- | -- | 0 | -- |
| 207 | JUNEAU | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 31 | KANSAS CITY | 0 | - | -- | - | -- | - | -- | - |
| 59 | KNOXVILLE | - | 0 | - | 0 | - | 0 | 0 | + |
| 127 | LA CROSSE-EAU CLAIRE | + | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 189 | LAFAYETTE, IN | -- | -- | -- | -- | -- | -- | -- | -- |
| 123 | LAFAYETTE, LA | 0 | - | - | 0 | 0 | 0 | 0 | - |
| 176 | LAKE CHARLES | - | -- | - | -- | -- | -- | 0 | 0 |
| 114 | LANSING | - | + | + | ++ | - | 0 | + | - |
| 188 | LAREDO | 0 | ++ | + | - | 0 | -- | + | ++ |
| 42 | LAS VEGAS | -- | ++ | 0 | -- | - | 0 | 0 | 0 |



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|-------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 63 | LEXINGTON | -- | -- | -- | 0 | - | - | -- | -- |
| 186 | LIMA | - | - | -- | -- | 0 | -- | - | 0 |
| 106 | LINCOLN & HASTINGS-KR | 0 | 0 | 0 | ++ | 0 | + | 0 | -- |
| 56 | LITTLE ROCK-PINE BLUF | - | - | 0 | - | -- | - | - | -- |
| 2 | LOS ANGELES | - | ++ | 0 | -- | 0 | - | 0 | 0 |
| 50 | LOUISVILLE | 0 | 0 | -- | 0 | 0 | - | - | 0 |
| 143 | LUBBOCK | -- | 0 | - | 0 | 0 | 0 | - | 0 |
| 122 | MACON | -- | - | 0 | 0 | -- | 0 | - | -- |
| 85 | MADISON | -- | -- | -- | -- | -- | -- | - | -- |
| 199 | MANKATO | -- | - | - | -- | 0 | -- | - | - |
| 180 | MARQUETTE | -- | ++ | 0 | 0 | + | 0 | ++ | ++ |
| 140 | MEDFORD-KLAMATH FALLS | + | + | + | -- | + | - | - | -- |
| 48 | MEMPHIS | -- | - | 0 | -- | -- | - | -- | -- |
| 185 | MERIDIAN | - | 0 | 0 | - | - | -- | -- | 0 |
| 16 | MIAMI-FT. LAUDERDALE | - | 0 | 0 | - | 0 | 0 | 0 | - |
| 35 | MILWAUKEE | 0 | - | 0 | - | + | - | 0 | 0 |
| 15 | MINNEAPOLIS-ST. PAUL | ++ | 0 | + | 0 | 0 | ++ | 0 | 0 |
| 158 | MINOT-BISMARCK-DICKIN | - | + | 0 | + | -- | + | 0 | + |
| 166 | MISSOULA | + | ++ | 0 | 0 | ++ | 0 | ++ | + |
| 60 | MOBILE-PENSACOLA (FT | - | 0 | 0 | - | - | 0 | 0 | 0 |
| 136 | MONROE-EL DORADO | -- | 0 | -- | -- | ++ | - | -- | 0 |
| 124 | MONTEREY-SALINAS | 0 | ++ | + | + | 0 | + | + | ++ |
| 118 | MONTGOMERY (SELMA) | -- | -- | -- | -- | -- | -- | -- | 0 |
| 29 | NASHVILLE | + | 0 | 0 | + | 0 | + | 0 | 0 |
| 53 | NEW ORLEANS | -- | - | - | - | 0 | 0 | 0 | - |
| 1 | NEW YORK | 0 | 0 | 0 | - | 0 | 0 | 0 | - |
| 43 | NORFOLK-PORTSMTH-NEWP | - | - | - | 0 | - | 0 | - | 0 |
| 209 | NORTH PLATTE | -- | - | -- | -- | -- | -- | ++ | -- |
| 156 | ODESSA-MIDLAND | 0 | ++ | + | 0 | 0 | ++ | 0 | ++ |
| 45 | OKLAHOMA CITY | + | 0 | + | + | ++ | ++ | ++ | 0 |
| 76 | OMAHA | 0 | 0 | 0 | + | 0 | 0 | -- | 0 |
| 19 | ORLANDO-DAYTONA BCH-M | + | + | 0 | 0 | + | + | 0 | + |
| 200 | OTTUMWA-KIRKSVILLE | -- | 0 | - | - | 0 | - | -- | 0 |
| 78 | PADUCAH-C.GIRD-HARBG- | - | 0 | -- | - | - | - | -- | - |
| 142 | PALM SPRINGS | 0 | ++ | + | + | ++ | ++ | + | ++ |
| 151 | PANAMA CITY | - | - | 0 | - | 0 | - | - | + |
| 193 | PARKERSBURG | -- | ++ | 0 | 0 | -- | ++ | ++ | + |
| 116 | PEORIA-BLOOMINGTON | 0 | 0 | - | - | -- | - | 0 | - |
| 4 | PHILADELPHIA | -- | 0 | - | -- | - | 0 | -- | - |
| 12 | PHOENIX | 0 | 0 | - | - | - | 0 | + | - |
| 23 | PITTSBURGH | -- | - | - | - | -- | 0 | - | -- |
| 22 | PORTLAND, OR | 0 | 0 | - | -- | - | 0 | 0 | - |
| 77 | PORTLAND-AUBURN | -- | 0 | 0 | -- | - | 0 | 0 | 0 |
| 204 | PRESQUE ISLE | - | -- | -- | -- | -- | - | 0 | 0 |
| 52 | PROVIDENCE-NEW BEDFOR | 0 | + | -- | 0 | - | -- | 0 | 0 |
| 171 | QUINCY-HANNIBAL-KEOKU | 0 | - | + | -- | 0 | 0 | - | -- |
| 27 | RALEIGH-DURHAM (FAYET | - | -- | 0 | 0 | - | 0 | - | 0 |
| 174 | RAPID CITY | -- | -- | -- | - | - | 0 | -- | -- |
| 108 | RENO | - | 0 | -- | 0 | -- | 0 | - | -- |
| 58 | RICHMOND-PETERSBURG | 0 | - | 0 | 0 | 0 | 0 | 0 | - |
| 67 | ROANOKE-LYNCHBURG | 0 | 0 | 0 | - | - | 0 | -- | -- |

TV Market Trend

Spot TV MarketTrend Report - January 2009 Input Compared to December 2008 SQAD Issue – First Quarter 2009

| <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> |
|-------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 80 | ROCHESTER, NY | 0 | 0 | 0 | 0 | - | 0 | 0 | 0 |
| 154 | ROCHESTR-MASON CITY-A | - | - | - | 0 | - | 0 | - | -- |
| 132 | ROCKFORD | 0 | - | 0 | 0 | - | - | - | -- |
| 20 | SACRAMNTO-STKTON-MODE | - | + | 0 | -- | 0 | 0 | 0 | 0 |
| 144 | SALISBURY | 0 | - | -- | ++ | + | 0 | - | ++ |
| 33 | SALT LAKE CITY | - | -- | 0 | 0 | 0 | 0 | - | -- |
| 196 | SAN ANGELO | - | 0 | + | + | ++ | + | 0 | ++ |
| 37 | SAN ANTONIO | -- | 0 | 0 | 0 | 0 | - | - | 0 |
| 28 | SAN DIEGO | 0 | - | 0 | - | 0 | 0 | 0 | 0 |
| 6 | SAN FRANCISCO-OAK-SAN | 0 | 0 | 0 | -- | - | - | - | 0 |
| 121 | SANTABARBRA-SANMAR-SA | ++ | ++ | ++ | ++ | ++ | ++ | ++ | ++ |
| 96 | SAVANNAH | 0 | 0 | 0 | + | 0 | 0 | 0 | + |
| 14 | SEATTLE-TACOMA | - | + | 0 | - | 0 | 0 | 0 | 0 |
| 161 | SHERMAN-ADA | -- | - | -- | 0 | - | -- | - | -- |
| 84 | SHREVEPORT | -- | -- | 0 | - | -- | - | - | -- |
| 149 | SIOUX CITY | -- | 0 | 0 | -- | - | -- | + | 0 |
| 113 | SIOUX FALLS(MITCHELL) | - | ++ | ++ | - | + | - | 0 | -- |
| 89 | SOUTH BEND-ELKHART | -- | -- | - | 0 | 0 | 0 | - | 0 |
| 75 | SPOKANE | -- | - | -- | -- | - | - | -- | -- |
| 74 | SPRINGFIELD, MO | - | - | -- | -- | - | 0 | -- | -- |
| 111 | SPRINGFIELD-HOLYOKE | -- | + | ++ | ++ | - | ++ | ++ | ++ |
| 201 | ST. JOSEPH | - | 0 | 0 | + | 0 | 0 | - | - |
| 21 | ST. LOUIS | 0 | 0 | + | 0 | 0 | + | 0 | + |
| 81 | SYRACUSE | - | -- | -- | - | -- | - | - | -- |
| 105 | TALLAHASSEE-THOMASVIL | ++ | ++ | 0 | ++ | ++ | ++ | ++ | ++ |
| 13 | TAMPA-ST. PETE (SARAS | 0 | 0 | - | - | 0 | 0 | - | + |
| 152 | TERRE HAUTE | -- | - | - | -- | 0 | 0 | - | - |
| 73 | TOLEDO | 0 | 0 | - | - | 0 | 0 | 0 | - |
| 138 | TOPEKA | -- | -- | - | -- | - | - | -- | 0 |
| 117 | TRAVERSE CITY-CADILLA | -- | + | - | ++ | 0 | ++ | -- | -- |
| 92 | TRI-CITIES, TN-VA | -- | - | 0 | - | -- | 0 | -- | - |
| 68 | TUCSON (SIERRA VISTA) | 0 | 0 | - | - | 0 | + | 0 | -- |
| 61 | TULSA | -- | -- | -- | 0 | -- | - | - | -- |
| 194 | TWIN FALLS | -- | 0 | 0 | - | 0 | 0 | 0 | + |
| 110 | TYLER-LONGVIEW(LFKN&N | 0 | 0 | - | - | - | 0 | 0 | - |
| 169 | UTICA | -- | + | 0 | 0 | 0 | 0 | 0 | + |
| 205 | VICTORIA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 94 | WACO-TEMPLE-BRYAN | - | 0 | - | 0 | 0 | ++ | 0 | - |
| 9 | WASHINGTON, DC (HAGRS | - | - | 0 | -- | 0 | - | - | -- |
| 177 | WATERTOWN | -- | + | ++ | -- | - | ++ | + | ++ |
| 135 | WAUSAU-RHINELANDER | 0 | 0 | 0 | -- | -- | - | 0 | 0 |
| 38 | WEST PALM BEACH-FT. P | 0 | + | ++ | 0 | 0 | + | 0 | + |
| 159 | WHEELING-STEUBENVILLE | -- | 0 | + | ++ | 0 | 0 | -- | ++ |
| 145 | WICHITA FALLS & LAWTO | - | + | - | -- | 0 | + | -- | 0 |
| 69 | WICHITA-HUTCHINSON PL | - | 0 | 0 | - | - | 0 | - | 0 |
| 54 | WILKES BARRE-SCRANTON | - | 0 | -- | - | -- | -- | 0 | -- |
| 134 | WILMINGTON | - | 0 | - | 0 | -- | - | - | 0 |
| 126 | YAKIMA-PASCO-RCHLND-K | -- | 0 | -- | -- | 0 | -- | -- | -- |
| 109 | YOUNGSTOWN | 0 | - | + | -- | 0 | 0 | - | -- |
| 164 | YUMA-EL CENTRO | -- | -- | -- | -- | 0 | -- | -- | -- |
| 203 | ZANESVILLE | -- | -- | -- | -- | -- | -- | - | -- |

What Do You Think 2009 Looks Like?

We'd love to hear your thoughts – and what you see happening at your company. There's a link in the cover email to participate in our short poll:

1. **Media predictions:** In 2009, which media will be experiencing greatest percentage growth in spending? The least?
2. **Account watch:** What percentage of your advertisers have increased budgets (or kept them flat)? Which categories will see adspending increases this year?
3. **Spot TV:** Are you planning to use Live, Live+3 or Live+7 in LPM markets in 2009?

The poll will be open until Wednesday, January 14th, and we'll report the results in the February issue. Thank you for your insights!

WebCosts Development Update

Commercial release planned for 2009

As Neil Klar mentioned in his annual new year letter, WebCosts continues to make great progress, and we're eagerly anticipating crossing the threshold from development to a commercial WebCosts in 2009.

Development continues as we continue to grow our contributor base. If you'd like to become a contributor, or have any questions about the WebCosts service, please contact Tom Adams at tadams@sqad.com or 914.703.6808.

SQAD on the Road Q1 '09

NATPE: Samantha Marlowe & Brian Uyeda will be demoing SNAP and WRAP on January 27-28. Mandalay Bay, Las Vegas.

ANA: February 12, 2009: TV & Everything Video Forum, Marriott Marquis Times Square, New York, NY.

AAAA: The SQAD team will have a booth at the 2009 AAAA Media Conference & Tradeshow. March 4-6 at the Hilton New Orleans Riverside.

TVB: SQAD will attend the annual conference. Date TBD.

Radio Update – PPM MarketTrends

Please note: Starting with the January Radio reports, the PPM MarketTrends can be found at: <http://www.sqad.com/products/spotRadio.jsp>

There is also a link from the SQAD home page under "Service."

If you've got questions on how SQAD can help you understand the changes in PPM markets, please contact Robin Blum (East) or Samantha Marlowe (West) for help with SQAD Spot Radio.