

# SQAD MONTHLY

**2010**  
**FEBRUARY**  
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**\$7.00**

## SQAD MARKET INDICATORS

### TV SMI February 2010

DP	Mkts	Mkts	Mkts	Mkts	Mkts	SMI
	++	+	0	-	--	
EM	29	55	102	17	7	1.12
DAY	27	55	103	14	11	1.09
EF	33	56	101	17	3	1.17
EN	41	73	82	10	4	1.22
PA	25	57	110	12	6	1.10
PR	36	62	101	9	2	1.19
LN	46	53	95	11	5	1.25
LF	36	47	103	11	13	1.13

$$SMI = \frac{(\#DoublePluses + \#SinglePluses + \#Same + \#SingleMinuses + 1)}{(\#DoubleMinuses + \#SingleMinuses + \#Same + \#SinglePluses + 1)}$$

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

January 2010

DP	Mkts	Mkts	Mkts	Mkts	Mkts	SMI
	++	+	0	-	--	
EM	5	0	2	1	11	0.600
DAY	5	0	0	1	13	0.467
EF	6	0	1	0	12	0.571
EN	3	3	2	0	11	0.529
PR	6	0	5	0	8	0.857
LN	7	1	1	1	9	0.846

Take our survey and be entered to  
**Win an AMAZON  
 KINDLE!**

Please see "Do You Know SQAD" (our new back page) for details!



## TV and Everything Video

The annual CES (Consumer Electronics Show) was held a few weeks ago, and, in addition to computer tablets, smartbooks, netbooks, eReaders and other wireless tech products, all of the television manufacturers [LG, Panasonic, Samsung, Sharp, Sony, Toshiba] were there in full force.

- 3D - 3D - 3D!** Every manufacturer had entries in this category, reinforced by the success of "Avatar" along with programming moves by Dreamworks, ESPN, Fox Sports and DirecTV.
- Thin is in.** Almost every manufacturer showed off their skills to create a flatter flat screen.
- Who will take the "LED?"** The broadening line-up of LED (light emitting diode) flat screens was made possible by lower manufacturing costs. In the earliest days of HDTV, plasma sets delivered the best picture quality - and the truest blacks. (Versus the washed-out black on LCD sets, which are lit with a fluorescent bulb.)
- Refresh rate.** All analog or digital televisions draw a picture on the screen, and the refresh rate is how often that picture is redrawn. The standard had been 60Hz (Hertz), meaning that it refreshes 60 times a second. Now refresh rates can be as high as 120Hz, which can mean a better picture and clearer motion shots. Whether you can see the difference is the question, so it's unclear how much improvement this will make for the average viewer.
- Wireless?!** It'd be great to rid yourself of a tangle of wires of cable or satellite connections, recording devices, etc., but is

wireless feasible in the average home? It's debatable whether wireless will gain steam any time soon, as the wired connections are always going to be more reliable.

- Connected TVs.** There were some DLNA-approved (Digital Living Network Alliance - dlina.org) TV sets at the CES this year, technology which enables access to video and music from portable media devices like compatible Walkman® and iPod® players via Digital Media Port (DMP) accessories. Additionally, certain models can display digital photos and play digital music from DLNA compliant and USB devices.

In addition to Television advances, cNet cited these "Top 5 Trends" from the CES:

- Mobile DTV:** The ability to broadcast digital TV to a variety of devices (players, cell phones) is predicted to be a bigger trend next year, as there were already a plethora of devices at the 2010 show.
- Apps:** are in "everything" - home automation systems, printers, televisions, just to name a few.
- eReaders:** Beyond the Kindle (see back page), Sony, Nook - everyone's playing!
- Slates (aka tablet):** almost every manufacturer showed slates this year - and don't forget the post-CES release of the Apple iPad.
- 3D was the biggest trend at the show -** for a variety of electronic products, not just TV. We'll be at the ANA TV & Everything Video (see back page) to see what the advertisers will be doing with any or all of this technology and report back next month. ●

Sources: Anandtech, Atlanta Journal-Constitution, cNet

**INSIDE:** ■ TV & Everything Video from the CES

- Web Report - J.P. Morgan
- Election Tools IV
- SQAD in the News

■ Do you know SQAD?

- Quick Survey for 2010
- SQAD on the Road
- SQAD Spotlight

**ROUTE TO:** \_\_\_\_\_

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## Web Report – SQAD’s look at the new J. P. Morgan Report

Recently there was a significant amount of publicity regarding J. P. Morgan analyst Imran Khan's forecast in his new Internet industry report.

In “Nothing But Net 2010 Internet Sector Outlook,” Khan forecasts that in 2010 U.S. display advertising will rebound 10.5 percent. According to an article in the January 4th TechCrunch, Mr. Khan used a variety of sources to draw his conclusion, which include the IAB, IDC, Nielsen/NetRatings as well as other sources. This is encouraging news as J. P. Morgan is not alone in forecasting a robust 2010 for Internet display advertising.

Regarding CPMs, however, costs are, for the most part, still in a recovery mode.

Looking at the December 2009 WebCosts’ “Seven Category Quarterly CPM” report, there may be an early indication that CPMs for some of the more popular categories have stabilized from earlier Q1 and Q2 fluctuations, and some may be poised to go north.

Of particular interest is the Automotive category and the Search Engine/Portal & Community category, which are entering Q1 2010 with CPMs marginally higher than Q4 2008. While most other categories in the report are below Q4 2008 CPMs, some categories have recouped 2009 decreases. Most notable is the Finance/ Insurance/Investment category. Here the average CPM dropped approximately 40 percent from Q4 2008 to Q1 2009. By Q4 2009 this category was within pocket change of the Q4 2008 number.

WebCosts is now reporting Quarterly Category trends for its subscribing community. While other reports may draw from a number of credible sources, WebCosts is the only resource that generates market CPMs based on the aggregation of actual transactions.

2010 will be a very exciting year for WebCosts. ●

### WebCosts® December 2009 Release

**Issue Date:** January 2010

**WebCosts is now reporting CPMs monthly. To become a subscriber please contact your SQAD representative for rate information.**

#### 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.

### Highlights: “Nothing But Net 2010 Internet Sector Outlook” [J. P. Morgan]

1. The stagnant display advertising space should bounce back in 2010, but it will be up to Web publishers to undertake more drastic measures to increase the value of their ad space, including reducing inventory and eschewing ad networks.
2. Following a year in which display advertising became undervalued, and the marketplace was dominated by price-fixed performance advertisers, top Web publishers are faced with abysmal click-through rates, irrelevant ads, and brands which have been spoiled by the ease of third-party networks that promise cheap premium inventory. The result is a huge disparity between brand and performance spending on the Web.
3. While overall media spending is tilted only slightly toward direct response (52 percent vs. 48 percent for brand dollars), just 27 percent of online spending goes towards branding. Overall only 5 percent of brand dollars are online vs. 30 percent of direct dollars.
4. As a remedy, sites should create more premium forms of banner ads (such as the oversized ad units being pushed by the Online Publisher’s Association), and utilize data targeting and time-based selling—all of which should help the industry bounce back in 2010.
5. Sites should also reduce their reliance on ad networks (which is already happening) and even consider serving fewer page views and ads. Khan cited the example of AOL, which saw CPMs decline by as much as 50 percent when it focused on inventory sell-through at the expense of premium selling. “I think the industry realizes the mistakes it made,” he said.
6. Khan sees many of these premium selling tactics benefiting the much scrutinized Web giant Yahoo, which he estimated commanded a hefty 17 percent share of the display market. However, ad inventory reduction will likely prove near impossible for social networking properties, which only become more popular.
7. Down the road, social networking sites are also positioned to become key sources of referral traffic for publishers and retail sites, predicts Khan—a dynamic that could one day threaten the role of search engines. However, in the near term the search ad business remains quite healthy, as J.P. Morgan forecast 13 percent growth in spending for the sector in 2010.

Source: <http://digitalmedianews.net/2010/01/05/online-display-ads-set-to-surge-imran-khan-jp-morgan-analyst/>

### Election Tools IV: "Dewey Defeats Truman"

This famously incorrect banner headline appeared on the front page of the Chicago Tribune on November 3, 1948, the day after incumbent President Harry Truman beat Republican challenger Thomas E. Dewey in the 1948 presidential election in an upset victory. It wasn't the first time . . . nor the last:

1. "Hughes Sweeps Country as the Election Winner" (November 7, 1916) Extra editions in many papers reported that Charles Evans Hughes had won the 1916 presidential election over President Woodrow Wilson, including the New York Herald, the Chicago Herald and The New York Times.
2. "Ford reportedly accepts No. 2 spot on GOP ticket" (July 17, 1980) The Washington Post and other newspapers carrying the Post story by David S. Broder and Lou Cannon reported that former President (and Vice-President) Gerald R. Ford had accepted an offer to serve as Ronald Reagan's running mate at the GOP convention in Detroit.
3. "Kerry's Choice: Dem picks Gephardt as VP candidate" (July 6, 2004) The New York Post erroneously stated that U.S. Presidential candidate John Kerry had chosen Dick Gephardt as his running mate, when in fact he had chosen John Edwards.

Although, possibly in their haste to "report it first," both traditional and digital media can have some of the facts wrong, the variety of options to spread the word – and fact-check it – has expanded tremendously.

Just look at the 2008 election new media use – for voter and candidate generated content:

	Blog	RSS	Video	Photos	MySpace	Podcasts
Obama	Yes	Yes	Yes	Yes	Yes	Yes
Clinton	Yes	Yes	Yes	Yes	Yes	Yes
Edwards	Yes	Yes	Yes	Yes	Yes	Yes
McCain	Yes	No	Yes	Yes	Yes	No
Giuliani	No	Yes	No	Yes	Yes	No
Romney	No	Yes	Yes	Yes	Yes	Yes

The trend continues, and as mid-term election season heats up, a variety of media will be used in the mix. If Massachusetts is any example, local political advertising will likely increase – both in traditional and new media. Local TV is forecast to benefit the most, and radio, newspapers and outdoor will see election dollars in 2010. These traditional media choices will continue to be complemented by a variety of social networks (Facebook, MySpace, Twitter, etc.), email, videos (YouTube), Google key word searches, blogs and mobile.

Whether MySpace or YouTube will be early indicators of a candidate's success is unclear, but one thing is certain: Digital media with candidate-generated content is taking its place alongside traditional media on the campaign trail.

Sources: Wikipedia, Feedburner, bNet

### SQAD In The News: 'Leno' Woes: NBC Local TV Battered By 25% Audience Drop

Late NBC local TV newscasts airing after "The Jay Leno Show" have seen ratings declines by 25% among key viewers, which is costing NBC stations \$22 million every three months.

Media agency Harmelin Media said local TV newscasts across 210 TV markets lost one-quarter of their respective adult 25-54 viewership, the main viewer group for TV news advertisers. The reason: NBC programming "The Jay Leno Show" in the 10 p.m. time period four months ago.

The analysis said some of NBC's biggest markets were hit hardest: In New York, Los Angeles and Philadelphia, there were ratings declines of 48%, 43% and 47%, respectively.

If NBC keeps "The Jay Leno Show" in prime time, the top 20 stations would continue to collectively lose about \$10 million in revenue per quarter. Looking at all 210 TV markets, NBC affiliates would lose a massive \$22 million every three months. Harmelin's data comes from TNS Media Intelligence market-specific cost-per-point data from SQAD.

While Jeff Gaspin, chairman of NBC Universal Television Entertainment, told TV critics earlier this week the network was profitable in the period, Harmelin says the situation is different when analyzing NBC's owned stations.

Estimates are that the 10 NBC owned stations are losing about \$570,000 per week, or \$7.4 million per quarter, according to Harmelin's analysis.

The analysis says the monetary losses do not take into account the additional revenue declines that NBC affiliates suffered directly in prime time and in late night, as a result of the "Leno" move.

Other analysis has pointed out that "The Tonight Show with Conan O'Brien" ratings are also down, partly a result of a lower ratings lead-in from "The Jay Leno Show" and lower late-night news viewership from local NBC stations.

Bernie Shimkus, vice president of research for Harmelin, stated: "Even if 'The Jay Leno Show' was itself profitable from a production standpoint, as NBC executives continued to assert to the end, the overall revenue picture for the company was not moving in a positive direction. The situation has turned into a public relations disaster with affiliates."

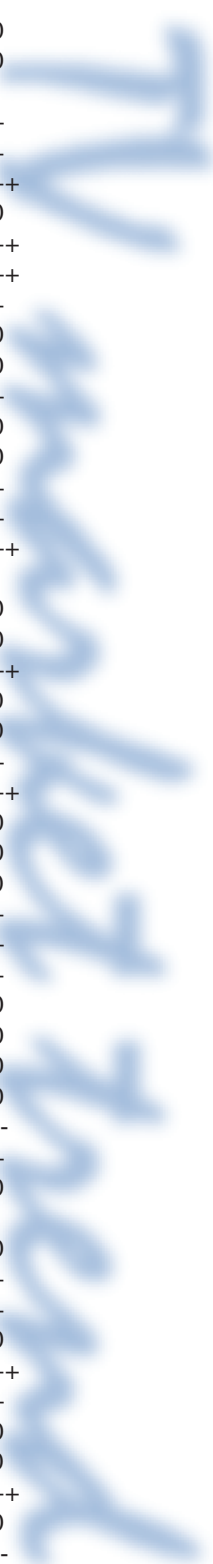
Source: MediaPost, Wayne Friedman, 1/13/10  
[www.mediapost.com/publications/?fa=Articles.showArticle&art\\_aid=120556](http://www.mediapost.com/publications/?fa=Articles.showArticle&art_aid=120556)

Spot TV MarketTrend Report - February 2010 Input Compared to January 2010 SQAD Issue – First Quarter 2010

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

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



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



Spot TV MarketTrend Report - February 2010 Input Compared to January 2010 SQAD Issue – First Quarter 2010

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



# DO YOU KNOW SQUAD?

Does SQUAD Know What You'd Like to See?  
Our Annual Newsletter, Web and Blog Survey.



**FILL OUT OUR SHORT SURVEY BY FEBRUARY 15  
AND YOU'LL BE ENTERED IN OUR DRAWING  
FOR AN AMAZON KINDLE!**

This year's survey covers products, training, and usage issues – and it's only 8 quick-to-answer, multiple-choice questions and one open-ended "what would you like to see" query!

For your convenience, the survey link <http://www.zoomerang.com/Survey/?p=WEB22A5KXU86QS> is included in this month's email cover letter. Thank you for your participation!

## SQUAD on the Road

### ANA TV & Everything Video

February 11 – Marriott Marquis  
New York

TV and video continue to present great opportunities to advertisers. Overall TV viewership is at an all-time high as the average U.S. viewer watches 4 hours and 49 minutes of TV per day - up 20 percent from a decade ago, according to Nielsen. SQUAD will be there to talk with attendees and hear about developments in technology, including mass availability of addressable TV.

### NYC Bowling for Breast Cancer

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

SQUAD 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.

### AAAA TranSFormation2010

February 28 – March 3 – Hilton Union Square  
San Francisco

TranSFormation 2010 is a unique opportunity to get everyone—managers, creatives, strategists, media, digital, production—to discuss the pressing matters of the day.

## NEW FEATURE!

### SQUAD Spotlight: Meet the SQUAD Team Janice Baio

**Years at SQUAD:** 20

**Title:** Office Manager

**My role:** Accounting,  
General Administration

**Favorite part of my  
job:** Talking with all of  
our customers – and our  
team here (Tarrytown)  
and in California.



**What you don't know about Janice:** She is the proud owner of two West Highland puppies: Oliver, almost three years old, and Scarlett, his newly-adopted, baby sister.

### Coming in March's Inside SQUAD:

> **TRANSFORMATION2010** >  
February 28 – March 3 > San Francisco, CA

Transformation 2010  
Sunday, February 28–Wednesday, March 3  
Hilton San Francisco Union Square on O'Farrell Street

## 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](http://www.sqad.com/newsletter).

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

### 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 (launch date 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
January 2010	--	++	0	0	0	+	0

### Baltimore (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	++	+	++	++	++	++	++
January 2010	++	++	0	--	++	0	++

### 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
January 2010	--	--	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
January 2010	--	-	-	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
January 2010	--	--	--	-	--	--	--

### 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
January 2010	++	++	++	++	++	++	++

### 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
January 2010	0	+	+	--	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
January 2010	--	+	--	--	--	--	--

### 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
January 2010	--	++	-	++	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
January 2010	++	++	++	++	++	++	++

### 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	++	++	++	--	++	++	++
January 2010	--	--	-	--	--	--	--

### 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
January 2010	++	++	+	++	++	++	++

### 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
January 2010	-	0	-	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
January 2010	--	+	--	++	--	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
January 2010	--	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
January 2010	+	++	+	+	++	++	++

### 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	+
January 2010	++	++	0	--	0	--	0

### Riverside-San Bernardino (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	--	-	--	-
January 2010	++	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	+
January 2010	++	++	+	++	++	++	++

### 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
January 2010	--	-	--	++	--	+	-

### 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
January 2010	++	++	+	--	+	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
January 2010	-	++	-	++	++	++	++

### 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
January 2010	++	++	++	++	++	++	++

### 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	--	+	++	++	+	++	++
January 2010	--	++	+	-	0	+	0

### 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
January 2010	--	+	+	--	-	-	-