



Clear Channel Outdoor is the world's largest out-of-home advertising company, with a portfolio of almost one million displays delivering intelligent and creative media campaigns in 44 countries. Its flexible out-of-home inventory spans multiple traditional and digital formats across roadside billboards and street furniture, retail, airport, transit and lifestyle environments. In the UK, Clear Channel provides more than 60,000 advertising opportunities.

Market

According to the Outdoor Advertising Association, the sector's revenues for the July–September 2010 period reached £212.2 million, up 12.4 per cent year-on-year. Roadside formats performed well, taking 52.4 per cent of the revenue – roadside's highest share since the fourth quarter of 2007. The other standout performance was digital small formats in the retail and leisure environments, which more than doubled revenue year-on-year following investment in the sector. Digital revenues accounted for £23.8 million in the third quarter, up 62 per cent year-on-year. For the first three quarters in 2010, the outdoor medium was up 14.9 per cent in 2010 overall – a performance that compares strongly against other media.

Product

Clear Channel Adshel is the UK's leading supplier of 6-sheet advertising, with 65 per cent of the UK roadside market. In addition, Clear Channel Adshel offers point of sale (POS) opportunities at some 300 Sainsbury's supermarkets and in more than 80 UK shopping malls.

Clear Channel Billboards is the market leader in quality 96-sheet billboards and provides national, high quality 48-sheet billboards across the UK. In 2009/10, Clear Channel conducted an extensive review of its inventory to focus on the highest quality sites and locations and is now reaping the benefits of this initiative.

The company's Pinnacle division offers market-leading premium advertising on more than 200 special high-profile sites such as London's Cromwell Road, Piccadilly Circus and M4 Towers.

Clear Channel also offers a network of 11 roadside digital LED sites across London and 140 digital sites in shopping malls across the UK.

Achievements

In 2010 Clear Channel's Collaboration team was named Outdoor Sales Team of the Year at the Campaign Media Awards. These awards are the most prestigious in the media calendar and recognise outstanding teams from media owners and agencies across product sector categories. Clear Channel's UK research team was also Highly Commended at the inaugural Media Research Group Awards.

Clear Channel is continually looking to reduce its energy consumption and promote sustainability; it was a finalist in the Low-Carbon Product category at the Green Business Awards and introduced a new LED lighting system that reduces energy consumption by

92 per cent at selected sites, while reducing energy demand in others by nearly 70 per cent.

Clear Channel's green credentials are long established, from its commitment to liquefied petroleum gas fuels and greener fleets, which secured the Green Fleet Award 2006 and the Fleet Hero Award 2007, to being named one of the top 50 Best Green Companies by The Sunday Times for the third consecutive year in 2010.

Recent Developments

In 2010 Clear Channel Outdoor expanded its Sainsbury's POS portfolio with more than 300 6-sheet panels added in 120 stores nationwide. Working with Sainsbury's, Clear Channel updated the sites to provide the best possible proximity for advertisers.

Clear Channel also expanded its market-leading Pinnacle Collection of the most striking out-of-home structures with the launch of the A3 Halo Tower at Shannon Corner, achieving 1.6 million impacts per panel every fortnight. Advertisers



provides leadership, direction and resources across all of its businesses.

Promotion

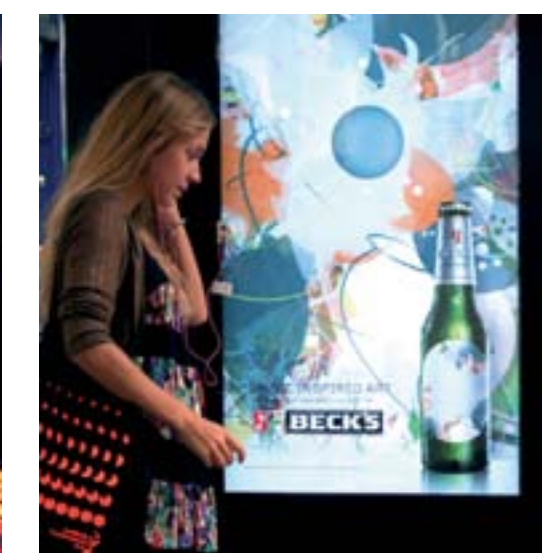
Clear Channel not only communicates with its key audiences – advertisers, agencies and other stakeholders – but also promotes the outdoor advertising industry. In partnership with Haymarket Brand Media, Clear Channel launched the Outdoor Planning Awards in 2007,

artwork directly generated from the music being played. Each 6-sheet location was also geo-tagged, allowing the finished pieces of artwork to be tracked using a London map.

Thanks to its industry knowledge, Clear Channel can provide research and insight to help advertisers and support the medium. It is also a strong supporter of Postar, the audience research body for the out-of-home advertising industry.

Brand Values

The Clear Channel vision is to inspire and motivate people with powerful out-of-home campaigns. Clear Channel embraces the values of freedom, flexibility, being forward-thinking and fulfilling promises. They inspire the business to focus on services such as WAVE proof of posting and on the environmental management work and charity support that the company undertakes. The company provides high quality products and services that benefit its clients, partners and communities, and helps to set new standards for the whole sector.



so far have included Gatwick Airport, Barclays, Waitrose, Smirnoff and Mercedes-Benz.

An interesting partnership with Kinetic Worldwide saw Clear Channel undertake pioneering face-tracking research aimed at increasing understanding of consumer behaviour and interaction with out-of-home media. Insights from the research included the moods of mall shoppers and the performance of digital out-of-home campaigns carrying static or moving content.

One further significant company development in 2010 was the appointment of Matthew Dearden as chief executive of Clear Channel UK and as a member of Clear Channel International's Executive Committee that

now in their fifth year. Clear Channel has also championed creativity in outdoor advertising through the Student Design Awards, which it has run for more than 20 years, and through annual industry seminars. Clear Channel also sponsored the Campaign BIG Awards in 2009 and 2010 and sponsored the Outdoor category at the Cannes Lions for the first time in 2010.

Clear Channel's involvement in the 2010 Beck's Music Inspired Art campaign, in which interactive 6-sheets were placed in prominent Clear Channel Outdoor locations around London, demonstrates the brand's continued commitment to cutting-edge promotional concepts. Passers-by were encouraged to plug their MP3 players into a headphone socket. Once connected, the ad space was filled with

Things you didn't know about Clear Channel Outdoor

Clear Channel has created unique solutions to the 'way-finding' needs of cities, combining practicality with clean, modern design through signage, finger posts and maps.

Clear Channel has a presence on both Twitter and Facebook, and the company also broadcast its latest seminar – The Outdoor Social Space – on the internet, encouraging audience interaction via a Twitter feed.

Clear Channel holds more than 350 municipal contracts in the UK, including the largest street furniture advertising contract with Transport for London.

Clear Channel's flagship Piccadilly Lite site is the only flexible advertising opportunity offered at the Piccadilly Circus location.

1936	1967	1996	2004	2006	2008
More O'Ferrall is founded.	The Adshel brand is launched.	The company is rebranded as the More Group. Two years later the More Group is acquired, Town & City billboard is bought, and the Sainsbury's contract is won.	The company wins the malls POS contract.	The company is rebranded as Clear Channel Outdoor. It buys Van Wagner in the UK and launches the Pinnacle brand.	The digital roadside network is formed and the Interact mobile services division launches. Bain Eccleshare is appointed president and CEO of Clear Channel International.

2009	2010
The digital malls network, national dry-posted billboards and WAVE technology launch. William Eccleshare is appointed president and CEO of Clear Channel International.	Clear Channel expands both its digital mall network and its Sainsbury's POS offering. The world's first 'Real 3D' out-of-home campaign also launches. Also in 2010, 'The Cromination' launches – six consecutive 96-sheets that dominate one of London's prime locations, Cromwell Road – with booked adverts including Nike, 20th Century Fox, Warner Bros, Emirates and Tourism Australia.