

MULTI-CULTURAL



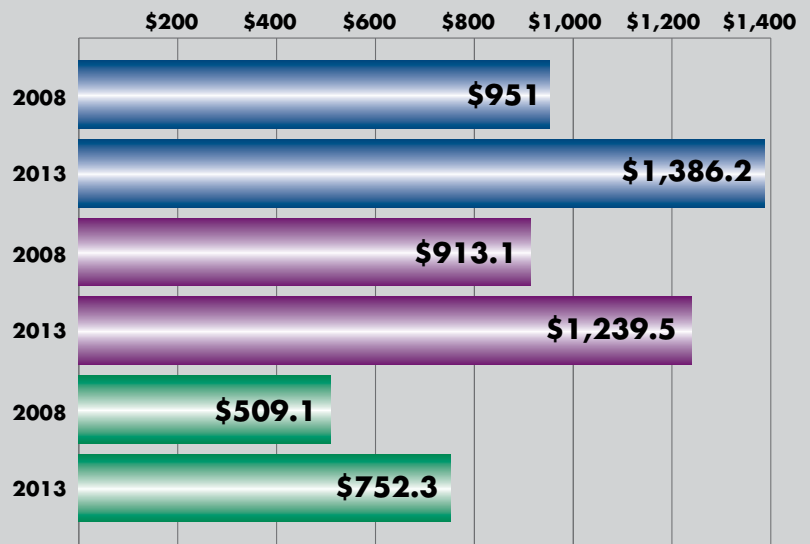
The buying power of the Multi-Cultural audience continues to thrive.

Buying Power Statistics by Race / Ethnicity

Targeting Hispanic, Asian, African-American and other niche markets is no longer about a trend. Multi-Cultural marketing is now part of most marketing strategies. This consumer market is continuously being advertised to in all formats and all media. From packaging to promotions, it is the new general market. It is more important than ever to differentiate a brand with these consumers. Outdoor advertising provides advertisers with the only medium to reach these consumers 24/7. Through its vast reach, targetability and high impact locations, outdoor advertising is a key variable in standing out with multi-cultural consumers. Clear Channel Outdoor can reach over 80% of these consumers on a daily basis with multiple products in leading U.S. DMA's.

US Buying Power Statistics by Ethnicity (billions of dollars)

- Hispanic ■
- African American ■
- Asian ■



HISPANIC COVERAGE



Outdoor advertising is an essential element in reaching the diverse and mobile Hispanic consumer.

DMA Rankings

	Hispanic 18+
1 Los Angeles CA	5,309,866
2 New York NY	3,457,509
3 Miami-Ft. Lauderdale FL	1,519,197
4 Houston TX	1,295,143
5 Chicago IL	1,209,005
6 San Francisco-Oakland-San Jose CA	1,151,394
7 Dallas-Ft. Worth TX	1,041,105
8 San Antonio TX	907,299
9 Phoenix (Prescott) AZ	874,783
10 Harlingen-Weslaco-Brownsville-McAllen TX	699,511
11 San Diego CA	645,872
12 Fresno-Visalia CA	639,223
13 Sacramento-Stockton-Modesto CA	627,758
14 Albuquerque-Santa Fe NM	581,099
15 Denver CO	533,403
16 El Paso TX (Las Cruces NM)	524,395
17 Washington DC (Hagerstown MD)	429,240
18 Orlando-Daytona Beach-Melbourne FL	393,357
19 Philadelphia PA	391,943
20 Austin TX	370,007
21 Tampa-St. Petersburg (Sarasota) FL	360,918
22 Atlanta GA	353,602
23 Boston MA (Manchester NH)	309,424
24 Las Vegas NV	303,073
25 Tucson (Sierra Vista) AZ	289,256

Source: 2009 Census Estimates CCO Markets **Bolded**

The Hispanic Market

The immense buying power of the nation's Hispanic consumers continues to energize the nation's consumer market. The 2006 American Community Survey showed that one out of every seven who lives in the U.S. is of Hispanic origin, and the U.S. Hispanic population continues to grow much faster than the non-Hispanic population. By 2013, one person out of every six in the U.S. will be Hispanic.

Over the 24-year period, 1990-2013, the nation's Hispanic buying power will grow dynamically. In sheer dollar power, Hispanics' economic clout will rise from \$212 billion in 1990, to \$490 billion in 2000, to \$951 billion in 2008, and to almost \$1.4 trillion in 2013. The 2008 value exceeds the 1990 value by 349 percent—a percentage gain that surpasses both the 141 percent increase in non-Hispanic buying power and the 151 percent increase in the buying power of all consumers. U.S. Hispanic buying power will grow faster than African American buying power (187 percent), Native American buying power (213 percent), and Asian buying power (337 percent).

In 2008, Hispanics accounted for 8.9 percent of all U.S. buying power, up from only 5 percent in 1990. Due to this brisk growth, Hispanic buying power essentially pulled even with African American buying power in 2006, and surpassed it in 2007. The estimates show that gap between the two groups' total buying power expanded in 2008 and will widen further in future years.

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AFRICAN AMERICAN COVERAGE



**Over 34 million
Americans make
up this ethnic
market segment.**

DMA Rankings	African American 18+
1 New York NY	2,653,849
2 Chicago IL	1,160,440
3 Atlanta GA	1,157,380
4 Washington DC (Hagerstown MD)	1,080,775
5 Philadelphia PA	969,842
6 Los Angeles CA	947,057
7 Houston TX	703,850
8 Detroit MI	667,872
9 Dallas-Ft. Worth TX	628,745
10 Raleigh-Durham (Fayetteville) NC	587,710
11 Miami-Ft. Lauderdale FL	576,067
12 Baltimore MD	548,827
13 Memphis TN	463,613
14 Norfolk-Portsmouth-Newport News VA	440,189
15 Charlotte NC	385,698
16 San Francisco-Oakland-San Jose CA	375,980
17 Cleveland-Akron (Canton) OH	345,969
18 St. Louis MO	335,788
19 Richmond-Petersburg VA	333,187
20 Birmingham (Anniston & Tuscaloosa) AL	305,466
21 Orlando-Daytona Beach-Melbourne FL	302,017
22 New Orleans LA	301,270
23 Jackson MS	291,792
24 Columbia SC	283,405
25 Tampa-St. Petersburg (Sarasota) FL	281,694

Source: 2009 Census Estimates CCO Markets **Bolded**

The African American Market

In 2008, African Americans accounted for the nation's largest minority market, and their economic clout will energize the U.S. consumer market as never before. The Selig Center projects that the nation's black buying power will rise from \$318 billion in 1990 to \$590 billion in 2000, to \$913 billion in 2008, and to \$1.2 trillion in 2013. The 1990 to 2008 percentage gain of 187 percent outstrips the 139 percent increase in white buying power and the 151 percent increase in total buying power (all races combined). In 2008, the nation's share of total buying power that is black was 8.5 percent, up from 7.4 percent in 1990. African-American consumers' share of the nation's total buying power will rise to 8.8 percent in 2013, accounting for almost nine cents out of every dollar that is spent.

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ASIAN COVERAGE



The Asian sector is the fastest growing segment of all ethnic groups in the U.S.

DMA Rankings

	Asian 18+
1 Los Angeles CA	1,687,619
2 New York NY	1,354,500
3 San Francisco-Oakland-San Jose CA	1,236,333
4 Honolulu HI	545,447
5 Chicago IL	398,677
6 Washington DC (Hagerstown MD)	358,400
7 Seattle-Tacoma WA	323,498
8 Sacramento-Stockton-Modesto CA	296,337
9 Houston TX	272,618
10 San Diego CA	263,820
11 Dallas-Ft. Worth TX	237,711
12 Philadelphia PA	232,641
13 Boston MA (Manchester NH)	230,464
14 Atlanta GA	173,404
15 Detroit MI	123,275
16 Portland OR	119,294
17 Las Vegas NV	113,310
18 Minneapolis-St. Paul MN	108,408
19 Phoenix (Prescott) AZ	99,294
20 Denver CO	94,272
21 Fresno-Visalia CA	83,538
22 Miami-Ft. Lauderdale FL	77,810
23 Orlando-Daytona Beach-Melbourne FL	74,780
24 Baltimore MD	74,725
25 Tampa-St. Petersburg (Sarasota) FL	66,903

Source: 2009 Census Estimates CCO Markets **Bolded**

The Asian Market

In 2008, 14.5 million Americans—4.8 percent of the country's population—will claim Asian ancestry, which makes the group a powerful force in the U.S. consumer market. This racial group's shares of the population were 3 percent and 4 percent in 1990 and 2000, respectively; and their enormous economic clout continues to attract more attention from businesses and advertisers. (The Selig Center's data for Asians combines two race categories, including those who identified themselves as Asian or as Native Hawaiian and other Pacific Islander.)

The Selig Center projects that the nation's Asian buying power will more than quintuple, climbing from \$116 billion in 1990 to \$269 billion in 2000, to \$509 billion in 2008, and to \$752 billion in 2013. The 337 percent gain from 1990 through 2008 was substantially greater than the increases in buying power projected for whites (139 percent), the U.S. as a whole (151 percent), blacks (187 percent), and Native Americans (213 percent), but is lower than the 349 percent gain projected for Hispanics. At \$509 billion in 2008, the U.S. Asian market already outshines the entire economies of all but seventeen countries—it is smaller than the 2007 GDP of Turkey but larger than the GDP of Sweden.

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