

CBS Outdoor Pack Portfolio

London Underground



alive

CBS
OUTDOOR

A Quick Guide to London Underground

Increasing passenger journeys

- Passenger journeys have increased year on year from 1.04bn (06/07) to 1.1bn (07/08), an increase of 5.4%
- 150,000 people enter the Underground Network every hour (TfL).
- Total passenger journeys are also set to grow another 40% by 2025 (TfL).
- 72% of all Greater London consumers use the Tube (TGI).

Increasing levels of engagement

Not only are passenger journeys increasing year on year but consumers are engaging with the advertising more. With nearly 30,000 newly transformed sites including a range of illuminated, digital and framed formats, it's hardly surprising that 15% more Tube users report seeing Underground advertising (TGI) - an uplift and improvement that is significantly greater than the 5% increase in passenger numbers (TfL).

Did you know?

COMMUNITY - London Underground is at the heart of every culture and community across London offering the most efficient method to reach a huge array of audiences.

WELCOMED - Tube advertising has the most positive relationship with the consumer - 87% of commuters welcome Tube advertising as it provides a welcome distraction during their journey (*The London Commuter*).

HIGH-END AUDIENCE - 75% of Tube travellers are ABC1 - considerably higher than the audience of TV, radio or roadside (TGI).

ACTED ON - 79% of commuters have been somewhere, bought something or looked something up as a direct result of Tube advertising (NFO).

DWELL TIME - The Tube is a high dwell environment – with people waiting on average for 3 minutes on the platform. Sites such as Underground 48 Sheets have an ad recall rate that is 6 times higher than low dwell environments (*Total Recall*).

FAMOUS - A Mad.co.uk survey identified the Tube as the No.1 brand that most media industry professionals identify with London.

Inner London Dominance

- 77% of Inner London residents are Underground users.
- Around 1/3 of all outdoor 6 & 48 sheets in Inner London Boroughs are CBS Outdoor Tube sites. For the sought after boroughs of Westminster and City of London the figures are close to 8 in 10.
- 4 out of every 5 Tube journeys starts or ends in Zone 1.
(TGI, Postar, TfL)

Leisure travel

As the London Travel report 2007 demonstrates, since 2005, evening travel went up by 11% suggesting an increased use of the Tube for evening social activities (TfL).

Transformation

With the installation of 18 DEP run's, 206 LCD screens and 52 XTP sites, CBS Outdoor are well on course to creating the largest digital advertising network in the world.

There are now 12,750 passenger side panels installed (3000 at the 10 interchange stations), 22 Media Walls and 92% of Platinum stations are complete - the London Underground has never been a more attractive proposition for advertisers.

I2 Sheet GD Pack

General Distribution or GD packs offer mass coverage and exposure amongst the 3 million daily passengers that travel on the Underground. The pack includes stations from Bank to Balham offering a London wide presence amongst this valuable commuter audience.

Includes Interchange Stations

Charing Cross
Euston
Kings Cross St Pancras
Liverpool Street
London Bridge
Marylebone
Paddington
Tower Hill
Victoria
Waterloo

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (225)	£83,250	£370	£86,959	5.1%
Pack price YOY increase (175)	£64,750	£370	£68,119	5.1%
Pack price YOY increase (125)	£46,250	£370	£49,278	5.1%
Interchange station footfall*			17.4m/2 wks	7.2%
Tube passenger journeys*			1.1bn	5.4%
Inflation Rate**				5.0%

All prices are gross & exclusive of VAT

Rates effective 1 January, 2009

*LUL 2008, **ONS

(Contact your CBS sales rep for the GD sample site list)

Pack Fact

These 10 key interchange stations have had a year on year footfall increase of 7.2%, indexing at 133 versus the whole Tube network.

I2 Sheet Summary

Quality of presentation – I2 Sheets are the double page spreads of the London Underground environment, delivering high end, glossy advertising opportunities.

Impact and Proximity – Their large size and positioning means they benefit from impact and proximity to consumers travelling through the network, offering excellent standout.

Frequency – Situated in high-traffic corridors and interchanges, I2 Sheets offer an attractive media and creative opportunity.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
225	1,874,567	76.2%	39,852,955	21.3
175	1,789,847	72.8%	29,891,791	16.7
125	1,677,832	68.2%	22,342,486	13.3

Source: TRAC, based on all adults for 2 weeks in LITV

Production

The production inclusive prices are gross and based on ONE creative execution. The cost includes: spares, repro, proofs, materials, printing, finishing, collation and delivery. Please note Gold I2 Sheets are produced in a combination of one and three pieces and due to the ongoing Transformation programme the number will change throughout 2009. Please contact your CBS Outdoor rep for more information.

12 Sheet Gold Pack (GD & Entertainer)

By combining General Distribution sites with the Entertainer Pack, the Gold Pack gives advertisers the change to extend their cover. This guarantees the advertiser broadcast coverage across the network as well as a presence in these entertainment orientated locations.

Entertainer Pack Stations

Covent Garden
Leicester Square
Oxford Circus
Piccadilly Circus
Tottenham Court Road

(Contact your CBS sales rep for the GD sample site list)

	Pack Price	No. of Entertainer sites	Production inclusive price	YOY +/-
Pack price YOY increase (250)	£96,700	25	£100,579	n/a
Pack price YOY increase (200)	£79,080	25	£82,619	n/a
Pack price YOY increase (150)	£61,500	25	£64,698	n/a
Built-in pack discount*	5.0%			
Entertainer station footfall**			7.6m/2 wks	5.6%
Tube passenger journeys**			1.1bn	5.4%
Inflation Rate***				5.0%

All prices are gross & exclusive of VAT

Rates effective 1 January, 2009

*If bought separately, **LUL 2008, ***ONS

12 Sheet Summary

Quality of presentation – 12 Sheets are the double page spreads of the London Underground environment, delivering high end, glossy advertising opportunities.

Impact and Proximity – Their large size and positioning means they benefit from impact and proximity to consumers travelling through the network, offering excellent standout.

Frequency – Situated in high-traffic corridors and interchanges, 12 Sheets offer an attractive media and creative opportunity.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
250	1,922,181	78.2%	50,902,186	26.5
200	1,904,854	77.5%	43,459,912	22.8
150	1,855,448	75.5%	39,103,470	21.1

Source: TRAC, based on all adults for 2 weeks in LITV

Production

The production inclusive prices are gross and based on ONE creative execution. The cost includes: spares, repro, proofs, materials, printing, finishing, collation and delivery. Please note Gold 12 Sheets are produced in a combination of one and three pieces and due to the ongoing Transformation programme the number will change throughout 2009. Please contact your CBS Outdoor rep for more information.

I2 Sheet Entertainer Pack

Reach an entertainment seeking London audience in the heart of the West End. With such a high concentration of bars, clubs, cinemas, theatres and other entertainment venues – advertisers can achieve stand out by highlighting their products or services to consumers in the right mind set at the right location.

Entertainer Pack Stations

Covent Garden
Leicester Square
Oxford Circus
Piccadilly Circus
Tottenham Court Road

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (25)	£18,500	£740	£19,765	n/a
Entertainer station footfall*			7.6m/2 wks	5.6%
Tube passenger journeys*			1.1 bn	5.4%
Inflation Rate**				5.0%

All prices are gross & exclusive of VAT

Rates effective 1 January, 2009

**LUL 2008, **ONS*

I2 Sheet Summary

Quality of Presentation – I2 Sheets are the double page spreads of the London Underground environment, delivering high end, glossy advertising opportunities.

Impact and Proximity – Their large size and positioning means they benefit from impact and proximity to consumers travelling through the network, offering excellent stand out.

Frequency – Situated in high-traffic corridors and interchanges, I2 Sheets offer an attractive media and creative opportunity.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
25	868,190	35.3%	10,167,579	11.7

Source: TRAC, based on all adults for 2 weeks in LITV

Production

The production inclusive prices are gross and based on ONE creative execution. The cost includes: spares, repro, proofs, materials, printing, finishing, collation and delivery. Please note entertainment I2 Sheets are produced in three pieces.

I2 Sheet Illuminated Pack

This pack includes sites positioned at key interchange and premier stations on the Underground. The illumination of these newly transformed, streamlined I2 sheets gives greater stand out for the advertising brand.

Illuminated Pack Stations

Angel	London Bridge
Baker Street	Mansion House
Bank	Moorgate
Blackfriars	Old Street
Bond Street	Paddington
Chancery Lane	Piccadilly Circus
Charing Cross	Sth Kensington
Earl's Court	Southwark
Embankment	Stratford
Euston	Swiss Cottage
Euston Square	Temple
Hammersmith (Dis)	Tottenham Court Rd
Heathrow T 123	Vauxhall
Holborn	Victoria
Knightsbridge	Waterloo
Leicester Square	Wembley Park
Liverpool Street	Westminster

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (50)	£44,950	£899	£46,599	-20.0%
Pack price YOY increase (25)	£22,475	£899	£23,493	-20.0%
Illumination Pack station footfall*			35.6m/2 wks	6.7%
Tube passenger journeys*			1.1bn	5.4%
Inflation Rate**				5.0%

All prices are gross & exclusive of VAT

Rates effective 1 January, 2009

*LUL 2008, **ONS

Pack Fact

This selection of iconic and high footfall stations has had a year on year footfall increase of 6.7%, indexing at 124 versus the whole Tube network.

I2 Sheet Summary

Quality of Presentation – 12 Sheets are the double page spreads of the London Underground environment, delivering high end, glossy advertising opportunities.

Impact and Proximity – Their large size and positioning means they benefit from impact and proximity to consumers travelling through the network, offering excellent stand out.

Frequency – Situated in high-traffic corridors and interchanges, 12 Sheets offer an attractive media and creative opportunity.

Illumination – This handpicked selection of 12 Sheets are available in an illuminated format, giving additional stand out to a campaign.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
50	1,504,643	61.2%	14,638,929	9.7
25	1,164,439	47.4%	7,791,254	6.7

Source: TRAC, based on all adults for 2 weeks in LITV

Production

The production inclusive prices are gross and based on ONE creative execution. The cost includes: spares, repro, proofs, materials, printing, finishing, collation and delivery. Please note illuminated I2 Sheets are produced in one piece.