

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.

16 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 (500)	£190,500	£381	£194,061	5.0%
Pack price YOY increase (350)	£133,350	£381	£136,471	5.0%
Pack price YOY increase (200)	£76,200	£381	£78,923	5.0%
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.

16 Sheet Summary

3 minutes dwell time – Longer dwell time produces greater retention, recall and motivation to purchase.*

Relay detailed brand messages – The length of dwell time combined with its welcomed nature offers an unbeatable platform for communicating with a captive audience.

Portrait canvas – The shape of 16 sheets make them ideal for brand response advertising, working especially well with Tube Car Panels.

Unique & Cost effective – This unique Tube format maintains all the inherent benefits of 48 sheets without the capital outlay.

* Total Recall – TNS 2007

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
500	2,020,303	82.2%	42,321,569	20.9
350	1,878,777	76.4%	29,471,799	15.7
200	1,647,965	67.0%	16,869,368	10.2

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.

16 Sheet Gold Pack (GD & Platinum)

By combining General Distribution stations with the Platinum 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 Platinum stations.

Platinum Pack Stations

Bank
Bond Street
Covent Garden
Green Park
Holborn
Knightsbridge
Leicester Square
Oxford Circus
Piccadilly Circus
Tottenham Court Road

	Pack Price	No of Platinum sites	Production inclusive price	YOY +/-
Pack price YOY increase (575)	£250,815	75	£254,584	5.6%
Pack price YOY increase (400)	£173,200	50	£176,611	5.6%
Pack price YOY increase (225)	£95,670	25	£98,465	5.5%
Built-in pack discount*	5.0%			
Platinum station footfall**			13.9m/2 wks	8.0%
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

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

Pack Fact

These 10 key Platinum stations have had a year on year footfall increase of 8.0%, indexing at 148 versus the whole Tube network.

16 Sheet Summary

3 minutes dwell time – Longer dwell time produces greater retention, recall and motivation to purchase.*

Relay detailed brand messages – The length of dwell time combined with its welcomed nature offers an unbeatable platform for communicating with a captive audience.

Portrait canvas – The shape of 16 sheets make them ideal for brand response advertising, working especially well with Tube Car Panels.

Unique & Cost effective – This unique Tube format maintains all the inherent benefits of 48 sheets without the capital outlay.

* Total Recall – TNS 2007

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
575	2,133,843	86.8%	74,001,181	34.7
400	2,064,663	84.0%	49,773,546	24.1
225	1,895,506	77.1%	27,594,573	14.6

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.

16 Sheet Business Pack

The Underground already delivers once of the highest ABCI profiles of any media in London – we've brought together the highest profiling stations and combined them with key interchange and destination stations that provide cover of London's most affluent professionals.

Business Pack Stations

Angel	Marylebone
Chancery Lane	Moorgate
Charing Cross	Old Street
Euston	Paddington
King's Cross St. Pancras	St. Paul's
Liverpool Street	Victoria
London Bridge	Waterloo

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (25)	£18,700	£748	£19,859	7.0%
Business Pack station footfall*			19.8m/2 wks	8.1%
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

These 14 key high profiling AbcI stations have had a year on year footfall increase of 8.1%, indexing at 150 versus the whole Tube network

16 Sheet Summary

3 minutes dwell time – Longer dwell time produces greater retention, recall and motivation to purchase.*

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Portrait canvas – The shape of 16 sheets make them ideal for brand response advertising, working especially well with Tube Car Panels.

Unique & Cost effective – This unique Tube format maintains all the inherent benefits of 48 sheets without the capital outlay.

* Total Recall – TNS 2007

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
25	785,514	31.9%	3,985,845	5.1

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.

I 6 Sheet Platinum Packs

The I 6 Sheet Platinum Pack includes these much favoured cross-track formats at the most iconic stations on the London Underground network, the Platinum Pack offers advertisers a prime position in the heart of London, coupled with a quality of audience and levels of engagement that cannot be matched.

Platinum Pack Stations

Bank
Bond Street
Covent Garden
Green Park
Holborn
Knightsbridge
Leicester Square
Oxford Circus
Piccadilly Circus
Tottenham Court Road

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (25)	£24,500	£980	£25,659	7.0%
Platinum station footfall*			13.9m/2 wks	8.0%
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

These 10 key Platinum stations have had a year on year footfall increase of 8.0%, indexing at 148 versus the whole Tube network.

I 6 Sheet Summary

3 minutes dwell time – Longer dwell time produces greater retention, recall and motivation to purchase.*

Relay detailed brand messages – The length of dwell time combined with its welcomed nature offers an unbeatable platform for communicating with a captive audience.

Portrait canvas – The shape of I 6 sheets make them ideal for brand response advertising, working especially well with Tube Car Panels.

Unique & Cost effective – This unique Tube format maintains all the inherent benefits of 48 sheets without the capital outlay.

* Total Recall – TNS 2007

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
25	980,325	39.9%	6,296,901	6.4

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.