

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.

4 Sheet GD Pack

General Distributions or GD packs offer broadcast 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 (900)	£101,700	£113	£103,328	4.6%
Pack price YOY increase (700)	£79,100	£113	£80,624	4.6%
Pack price YOY increase (425)	£48,025	£113	£49,405	4.6%
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.

4 Sheet Summary

Cost Effective - Often described as the Underground's notice board format, 4 Sheets are a cost effective method for driving awareness.

Coverage and Flexibility – 4 sheets offer high coverage due to the excellent positioning in corridors, ticket halls and station platforms. The flexibility of 4 Sheets means they can be adapted to suit any business objective.

Display - As all the sites across the Underground are upgraded, new 4 Sheets will have glazed slim-line frames.

Targeted - 4 Sheets are also available in packs designed to reach specific audiences such as tourists or commuters.

Working together to amplify your message – Using the high coverage of 4 Sheets in conjunction with digital offers frequency and brand presence while digital provides tactical opportunities.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
900	2,236,542	91.0%	134,206,259	60.0
700	2,220,046	90.3%	103,601,389	46.7
425	2,157,531	87.8%	64,327,214	29.8

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.

4 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 in 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)	£7,500	£300	£7,990	n/a
Entertainer station footfall*			7.6m/2 wks	5.6%
Tube passenger journeys*			1.1bn	5.4%
Inflation Rate**				5.0%

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Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
25	900,570	36.6%	12,224,848	13.6

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.

4 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 (1000)	£127,600	100	£129,288	n/a
Pack price YOY increase (750)	£91,200	50	£92,755	n/a
Pack price YOY increase (450)	£53,820	25	£55,220	n/a
Built-in pack discount*	3.0%			
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

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Targeted - 4 Sheets are also available in packs designed to reach specific audiences such as tourists or commuters.

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Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
1,000	2,263,350	92.1%	189,007,323	83.5
750	2,243,142	91.2%	141,808,227	63.2
450	2,183,281	88.8%	87,222,179	40.0

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.

4 Sheet Illuminated Pack

The Illuminated Packs bring advertising to life using the streamlined backlit framed 4 Sheets. These glossy, highlighted sites on the network ensure that consumers are more likely to be drawn to the site and therefore dwell for longer.

Illuminated Pack Stations

Aldgate	Mansion House
Angel	Moorgate
Baker Street	Notting Hill Gate
Bank	Old Street
Barbican	Piccadilly Circus
Blackfriars	Sth Kensington
Bond Street	St. Paul's
Chancery Lane	Stockwell
Charing Cross	Southwark
Earl's Court	Stratford
Embankment	Swiss Cottage
Euston	Temple
Hammersmith (Dis)	Tottenham Ct Rd
Holborn	Vauxhall
Hyde Park Corner	Victoria
King's Cross St. Pancras	Waterloo
Knightsbridge	Wembley Park
Leicester Square	Westminster

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (75)	£27,600	£368	£28,479	5.1%
Pack price YOY increase (50)	£18,400	£368	£19,089	5.1%
Pack price YOY increase (25)	£9,200	£368	£9,690	5.1%
Illumination Pack station footfall*			33.7m/2 wks	8.3%
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 8.3%, indexing at 154 versus the whole Tube network.

4 Sheet Summary

Illumination – This handpicked selection of 4 Sheets are available in an illuminated format, giving additional standout to a campaign.

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Targeted - 4 Sheets are also available in packs designed to reach specific audiences such as tourists or commuters.

Working together to amplify your message – Using the high coverage of 4 Sheets in conjunction with digital offers frequency and brand presence while digital provides tactical opportunities.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
75	1,738,045	70.7%	22,496,625	12.9
50	1,505,972	61.3%	15,252,309	10.1
25	1,233,864	50.2%	7,829,893	6.3

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.