

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.

48 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.

Including 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 (100)	£141,400	£1,414	£146,656	5.0%
Pack price YOY increase (75)	£106,050	£1,414	£110,926	5.0%
Pack price YOY increase (50)	£70,700	£1,414	£74,869	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.

48 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.

Most favoured – 48 Sheets are the most favoured site by commuters on the Underground and 87% state they prefer the Underground with advertising.**

Scale and proximity – The sheer size of 48 sheets captures the attention, but it is the proximity to consumers, which creates a truly un-missable creative canvas.

* Total Recall – TNS 2007

**The London Commuter 2006

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
100	1,390,888	56.6%	10,602,950	7.6
75	1,232,073	50.1%	7,560,856	6.1
50	1,038,172	42.2%	4,397,929	4.2

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.

48 Sheet Interchange Pack

This pack includes sites positioned at key interchange stations between the Underground and National Rail networks enabling advertisers to reach huge volumes of commuters, travelling in and out of London. All sites are situated on inbound platforms offering advertisers the opportunity to communicate with commuters in the morning on their way to work.

Interchange Pack 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 (15)	£41,520	£2,768	£43,456	7.0%
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

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Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
15	694,997	28.3%	2,862,419	4.1

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.

48 Sheet Gold Pack (GD & Platinum)

By combining General Distribution sites with the Platinum Pack, the Gold Pack gives advertisers the chance to extend their cover. This guarantees broadcast coverage across the network as well as a presence in these Platinum stations.

Including Platinum 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 (115)	£179,446	15	£184,976	5.6%
Pack price YOY increase (90)	£146,736	15	£151,811	5.7%
Pack price YOY increase (65)	£114,036	15	£118,766	5.8%
Built-in pack discount*	7.5%			
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.

48 Sheet Summary

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* Total Recall – TNS 2007

**The London Commuter 2006

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
115	1,601,301	65.1%	16,389,321	10.2
90	1,446,204	58.8%	12,524,083	8.7
65	1,341,429	54.6%	10,166,273	7.6

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.

48 Sheet Platinum Pack

The 48 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 (15)	£52,590	£3,506	£54,526	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.

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**The London Commuter 2006

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
15	735,663	29.9%	3,529,799	4.8

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.