

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.

6 Sheet GD Pack

General Distribution 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 (400)	£155,200	£388	£157,266	2.9%
Pack price YOY increase (300)	£116,400	£388	£118,366	2.9%
Pack price YOY increase (200)	£77,600	£388	£79,489	2.9%
Interchange station footfall*			17.4m/2 wks	7.2%
Tube passenger journeys*			1.1bn	5.4%
Inflation Rate**				5.0%

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

All prices are gross & exclusive of VAT

Rates effective 1 January, 2009

*LUL 2008, **ONS

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.

6 Sheet Summary

Broadcast - 6 Sheets on the London Underground are a premium product delivering broadcast cover or precision lifestyle and demographic targeting.

Frequency – A brand building format found in busy corridors and ticket halls offering advertisers high frequency in central London that other outdoor solutions cannot provide.

Display - New 6 Sheet frames are backlit, slim-line and lightweight frameless displays - all designed to enhance impact and engagement.

Targeted - 6 Sheets can be bought in Precision Packs, which enable advertisers to reach specific groups and communities, using only advertising sites that have a high enough profile.

100% pedestrian – Underground 6 Sheets benefit from 100% pedestrian traffic meaning every pair of eyes has the opportunity to absorb the ad.

Working together to amplify your message – Using the high coverage of 6 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
400	2,195,268	89.3%	118,404,913	53.9
300	2,158,632	87.8%	96,014,418	44.5
200	2,103,843	85.6%	69,031,024	32.8

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.

6 Sheet Triples Pack

The Triples Pack allows advertisers to create maximum impact by dominating a corridor space using three adjacent 6 Sheet panels. Different creative can be used on the panels to create a 'journey' or 'story', alternatively creative can be repeated to increase frequency of ad exposure and recall.

6 Sheets Triple Stations

Angel
Bank
King's Cross St. Pancras
Liverpool Street
London Bridge
Notting Hill Gate
Old Street
South Kensington
Victoria
Waterloo

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (120)	£57,120	£476	£58,871	3.0%
Triples station footfall*			17.6m/2 wks	9.0%
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

(Contact your CBS sales rep for Triples sample site list)

Pack Fact

This selection of iconic and high footfall stations has had a year on year footfall increase of 9.0%, indexing at 167 versus the whole Tube network.

6 Sheet Summary

Broadcast - 6 Sheets on the London Underground are a premium product delivering broadcast cover or precision lifestyle and demographic targeting.

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Display - New 6 Sheet frames are backlit, slim-line and lightweight frameless displays - all designed to enhance impact and engagement.

Targeted - 6 Sheets can be bought in Precision Packs, which enable advertisers to reach specific groups and communities, using only advertising sites that have a high enough profile.

100% pedestrian – Underground 6 Sheets benefit from 100% pedestrian traffic meaning every pair of eyes has the opportunity to absorb the ad.

Working together to amplify your message - Using the high coverage of 6 Sheets in conjunction with digital offers frequency and brand presence while digital provides tactical opportunities. Or station dominations at Oxford Circus and Bond Street which envelope consumers in the brand. Further prestige can be added through use of gold framed T-sides.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
120	1,873,322	76.2%	38,265,245	20.4

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.

6 Sheet Oxford Street Plus Pack

Stations located in the retail heart of West-End, Kensington and Chelsea provide access to shoppers that account for over 65% of the retail expenditure in London. Oxford Street alone saw more than £5.5bn spent within its stores in 2007 (Source: GLA Economics). These 35 sites are perfect for reaching consumers just prior to purchase during the decision making stage.

Oxford Street Plus Pack Stations

Bond Street
High Street Kensington
Knightsbridge
Marble Arch
Notting Hill Gate
Oxford Circus
Sloane Square
South Kensington
Tottenham Court Road
Westfield

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (35)	£20,370	£815		n/a
Oxford St Pack station footfall*			9.8/2 wks	8.5%
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

The 10 key retail specific stations have had a year on year footfall increase of 8.5%, indexing at 157 versus the whole Tube network.

6 Sheet Summary

Broadcast - 6 Sheets on the London Underground are a premium product delivering broadcast cover or precision lifestyle and demographic targeting.

Frequency – A brand building format found in busy corridors and ticket halls offering advertisers high frequency in central London that other outdoor solutions cannot provide.

Display - New 6 Sheet frames are backlit and slim-line, designed to enhance impact and engagement and making the brand the star.

Targeted - 6 Sheets can be bought in Precision Packs, which enable advertisers to reach specific groups and communities, using only advertising sites that have a high enough profile.

100% pedestrian – Underground 6 Sheets benefit from 100% pedestrian traffic meaning every pair of eyes has the opportunity to absorb the ad.

Amplify your message – Using the high coverage of 6 Sheets in conjunction with digital offers frequency and brand presence while digital provides tactical opportunities.

Dominant Oxford Street – By using 6 Sheets with our stations dominations at Oxford Circus and Bond Street, advertisers have the opportunity to immerse consumers in their brand just before they enter Oxford Street. Or by combining 6 sheets with gold framed T-sides, it's possible to target consumers before they exit the station and on the high street, ready to spend.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
35	988,433	40.2%	20,594,279	20.8

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.

6 Sheet Oxford Street Pack

Attracting over 200m consumers every year, Oxford Street is Europe's busiest high street and London's catwalk. In 2007, more than £5.5bn was spent on this street alone (Source: GLA Economics). This pack offers 25 sites at the heart of this retail Mecca at the point directly before purchase.

CBS Outdoor has 236, 6 Sheets in the four stations serving Oxford Street compared to a total of 36 roadside 6 Sheets on the whole of Oxford Street itself.

Oxford Street Pack Stations

Bond Street
Marble Arch
Oxford Circus
Tottenham Court Road

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (25)	£19,150	£766	£19,734	-4.3%
Oxford St Pack station footfall*			6.2/2 wks	10.2%
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

Pack Fact

These 4 key retail specific stations have had a year on year footfall increase of 10.2%, indexing at 189 versus the whole Tube network.

6 Sheet Summary

Broadcast - 6 Sheets on the London Underground are a premium product delivering broadcast cover or precision lifestyle and demographic targeting.

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Display - New 6 Sheet frames are backlit and slim-line, designed to enhance impact and engagement and making the brand the star.

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100% pedestrian – Underground 6 Sheets benefit from 100% pedestrian traffic meaning every pair of eyes has the opportunity to absorb the ad.

Amplify your message – Using the high coverage of 6 Sheets in conjunction with digital offers frequency and brand presence while digital provides tactical opportunities.

Dominate Oxford Street – By using 6 Sheets with our stations dominations at Oxford Circus and Bond Street, advertisers have the opportunity to immerse consumers in their brand just before they enter Oxford Street. Or by combining 6 sheets with gold framed T-sides, it's possible to target consumers before they exit the station and on the high street, ready to spend.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
25	767,801	31.2%	18,509,960	24.1

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.

6 Sheet Gold Pack (GD & Oxford St)

By combining General Distribution sites with the Oxford Street Pack, the Gold Pack gives advertisers the change to extend their cover. This guarantees the advertiser broadcast coverage across the network as a point of sale presence, just before consumers reach Europe's busiest shopping street.

Oxford Street Pack Stations

Bond Street
Marble Arch
Oxford Circus
Tottenham Court Road

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

	Pack Price	No. of Oxford St Pack sites	Production inclusive price	YOY +/-
Pack price YOY increase (425)	£169,065	25	£171,180	3.6%
Pack price YOY increase (325)	£131,430	25	£133,416	3.1%
Pack price YOY increase (225)	£93,870	25	£95,774	2.5%
Built-in pack discount*	3.0%			
Oxford St Pack station footfall**			6.2/2 wks	10.2%
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

Pack Fact

These 4 key retail stations have had a year on year footfall increase of 10.2%, indexing at 189 versus the whole Tube network.

6 Sheet Summary

Broadcast - 6 Sheets on the London Underground are a premium product delivering broadcast cover or precision lifestyle and demographic targeting.

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Targeted - 6 Sheets can be bought in Precision Packs, which enable advertisers to reach specific groups and communities, using only advertising sites that have a high enough profile.

100% pedestrian – Underground 6 Sheets benefit from 100% pedestrian traffic meaning every pair of eyes has the opportunity to absorb the ad.

Working together to amplify your message - Using the high coverage of 6 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
425	2,238,495	91.0%	142,578,039	63.7
325	2,213,531	90.0%	115,402,607	52.1
225	2,178,467	88.6%	89,268,582	41.0

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.

6 Sheet DLR Network Pack

Pack Fact

Audience growth – Each week the DLR carries 953,000 passengers - and increase of 20% YOY*

*LTfL audience statistics

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (100)	£31,400	£314	£32,905	3.0%
Pack price YOY increase (75)	£23,550	£314	£24,783	3.0%
Pack price YOY increase (50)	£15,700	£314	£16,698	3.0%
Pack price YOY increase (25)	£7,850	£314	£8,434	3.0%
Passenger increase*			2.6m/2 wks	20.0%
Inflation Rate**				5.0%

All prices are gross & exclusive of VAT

Rates effective 1 January, 2009

*LTfL audience statistics, **ONS

(Contact your CBS sales rep for a full sample site list)

DLR Summary

Quality audience - An audience with means, the average salary of people using the DLR is £60,000 p.a. (74% are ABCI).**

Unique environment - Uniquely as the DLR is above ground, it offers highly visible advertising opportunities and is mobile friendly, thus creating direct response opportunities.

DLR patronage up to massive 67 million passenger journeys

- This is predicted to increase to 80 million in 2009
- Growth largely due to business hub at Canary Wharf, Bank, the O2 at North Greenwich and City Airport

*TfL audience statistics

**ONS

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube & DLR Users	Total OTS	Average OTS
100	715,249	29.1%	5,306,552	7.4
75	561,777	22.8%	4,021,318	7.2
50	478,553	19.5%	2,755,733	5.8
25	447,337	18.2%	1,606,846	3.6

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.