

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.

LEP 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
Victoria
Waterloo

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (850)	£79,900	£94	£82,435	4.4%
Pack price YOY increase (650)	£61,100	£94	£63,340	4.4%
Pack price YOY increase (400)	£37,600	£94	£39,470	4.4%
Interchange station footfall*			16.8m/2 wks	7.3%
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 8 key interchange stations have had a year on year footfall increase of 8.6%, indexing at 159 versus the whole Tube network.

LEP Summary

Point of Sale – Stair, Corridors, Lift & Escalator Panels (LEPs) are perfect for filling that empty moment on the way in or out of a station and with 79% of commuters having responded to a Tube ad – this is an excellent POS opportunity*

Entry Point Advertising – A great opportunity for small advertisers to create a presence at their local stations just prior to exit.

Dominate - LEPs are concentrated in central London and are a great source of inspiration for people about to go shopping in areas where roadside advertising formats are not generally found.

Redesign - The new slim-line glazed frames that are currently being introduced across the network will add a superior presentation to all advertising on LEPs.

Creativity - LEPs can be combined in runs of 3 or 6 panels, or in a whole escalator run giving advertisers a chance to dominate this journey and create un-missable impact.

*The London Commuter – 2006

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
850	2,224,518	90.5%	116,584,679	52.4
650	2,212,433	90.0%	89,222,918	40.3
400	2,168,317	88.2%	55,073,832	25.4

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.

LEP Superweight GD Pack

The super weight GD pack provides extra punch with increased coverage and frequency over the normal weight GD pack. It provides mass 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
Victoria
Waterloo

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (1000)	£89,300	£89	£92,058	n/a
Built-in pack discount*	5.0%			
Interchange station footfall*			16.8m/2 wks	7.3%
Tube passenger journeys**			1.1bn	5.4%
Inflation Rate***				5.0%

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*Based on GD price per site, **LUL 2008, ***ONS

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Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
1,000	2,241,319	91.2%	148,282,798	66.2

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.

LEP 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.

Interchange Pack Stations

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

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (60)	£9,900	£165	£10,675	n/a
Interchange station footfall*			15.2m/2 wks	8.6%
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
60	1,243,980	50.6%	15,488,952	12.5

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.

LEP 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)	£104,400	150	£107,158	n/a
Pack price YOY increase (750)	£76,950	100	£79,338	n/a
Pack price YOY increase (450)	£45,180	50	£47,124	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%

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Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
1,000	2,258,780	91.9%	143,704,891	63.6
750	2,251,455	91.6%	108,191,866	48.1
450	2,221,458	90.4%	65,153,949	29.3

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.

LEP 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 (50)	£9,950	£199	£10,671	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
50	804,077	32.7%	10,826,095	13.5

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

Production

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Tottenham Court Road

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	Pack Price	No. of Entertainer sites	Production inclusive price	YOY +/-
Pack price YOY increase (1150)	£117,658	150	£120,639	n/a
Built-in pack discount*	5.0%			
Entertainer station footfall**			7.76/2 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
1,150	2,260,734	91.9%	165,612,990	73.3

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

Production

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