

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.

Showcase Squares

Unique stand-out – With their unique shape and optimum positing in specific locations, Showcase Squares capture the attention of commuters as they move through the station.

High frequency - Showcase squares have all the benefits of a 6 sheet with a very high frequency amongst a habitual audience, however they also amplify the brand message because of their location and head on factor.

Design - Showcase squares have a unique, attractive look and these features are transferred to brands, capturing attention and ensuring higher recall.

Premier Stations

Angel	Marble Arch
Baker Street	Moorgate
Bank	Notting Hill Gate
Blackfriars	Old Street
Bond Street	Piccadilly Circus
Chancery Lane	Russell Square
Embankment	South Kensington
Hammersmith	St. James's Park
King's Cross St Pancras	Tottenham Court Rd
Knightsbridge	Victoria
Liverpool Street	Waterloo
London Bridge	Westminster

	Pack Price	Price per site	Production inclusive price	YOY +/-
Pack price YOY increase (75)	£61,350	£818	£63,485	5.0%
Premier station footfall*			29.6m/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

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

Pack Fact

These Premier stations have had a year on year footfall increase of 8.5%, indexing at 157 versus the whole Tube network.

Coverage & Frequency

Number of sites	Audience Reached	Coverage of Total Tube Users	Total OTS	Average OTS
75	1,985,028	80.7%	35,752,986	18.0

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.