

Advertising Annual Report 2022/23



MAYOR OF LONDON





Contents

3	Foreword
4	Message from the Chair
5	Getting the message across
6	Creative campaigns
11	Recognising the reach of Commercial Media

16	Elizabeth line
20	Responsible advertising
22	Campaign management
26	Advertising Steering Group
27	Contact us

Advertising Annual Report 2022/23

Foreword

Our advertising estate gives brands a unique opportunity to reach Londoners

The Transport for London (TfL) advertising estate is a unique canvas for brands enabling them to reach diverse audiences while enhancing our customers' experience. I am delighted to introduce this report, which I know you will find informative. Like me, I'm sure you will enjoy seeing the incredible variety of advertising assets and campaigns that make up this world-leading out-of-home advertising estate.

Looking at TfL's advertising successes for the last financial year, the new assets on the Elizabeth line stand front and centre of our achievements. Especially the digital screens at Bond Street station, which are proving highly attractive to luxury brands, as well as enabling us to attract some new brands to our network.

Revenue generated by Commercial Media is up on the previous year, which is incredibly important for TfL, enabling us to invest this money back into improving our services. We are not quite back to pre-pandemic levels, but getting near thanks to the close collaboration between us, our advertising partners Global and JCDecaux, and the advertising industry.

I want to say a big thank you to the Advertising Steering Group, chaired by Dr Mee Ling Ng, who provide us with valuable expertise and support. You can see more about their work later in this report.

We also have a duty to display responsible advertising and we work closely with the Advertising Standards Authority (ASA) on emerging areas of interest, like cryptocurrency and environmental claims in advertisements.

Please get in touch if you have any views you would like to share about the work that we do, on our Advertising Policy, or even just on an advertisement you have seen on our estate. We carefully consider all ideas and suggestions, and take any complaints seriously. They all go towards creating a better network and help improve the experience for all our customers.



Emma Strain **Customer Director** (she/her)

'Revenue generated by Commercial Media is up on the previous year, which is incredibly important for TfL, enabling us to invest this money back into improving our services.'





ALL OF US WIN Visa is a proud sponsor of

UEFA Women's EURO 2022[™]





Message from the Chair

We help TfL keep its Advertising Policy fit for purpose

The role of the TfL Advertising Steering Group is to oversee TfL's Advertising Policy and its application across its extensive advertising estate. As Chair of the Advertising Steering Group, I am supported by a team of TfL officers, our advertising partners and a number of independent external advisers, to ensure that the advertising guidelines are adhered to and reflect the diversity of our communities in London.

In the past financial year, the group looked at how creative campaigns are managed and monitored, as well as a wide set of issues arising from submitted creative campaigns. These issues range from content depicting high fat, salt and sugar products, and body image, to advertising around the FIFA World Cup 2022. I would like to thank members of the group for their expert input and constructive advice throughout our deliberations. TfL works in a positive and constructive way with its advertising partners, and their clients, to ensure the advertisements on our estate are dynamic and enjoyable for all our customers who use our network.

I was delighted to welcome, in May 2023, Shani Danda and Marty Davies to the Advertising Steering Group. Shani and Marty will bring important perspectives to our meetings with their lived and professional experience in disability, inclusion and LGBTQ+ issues.

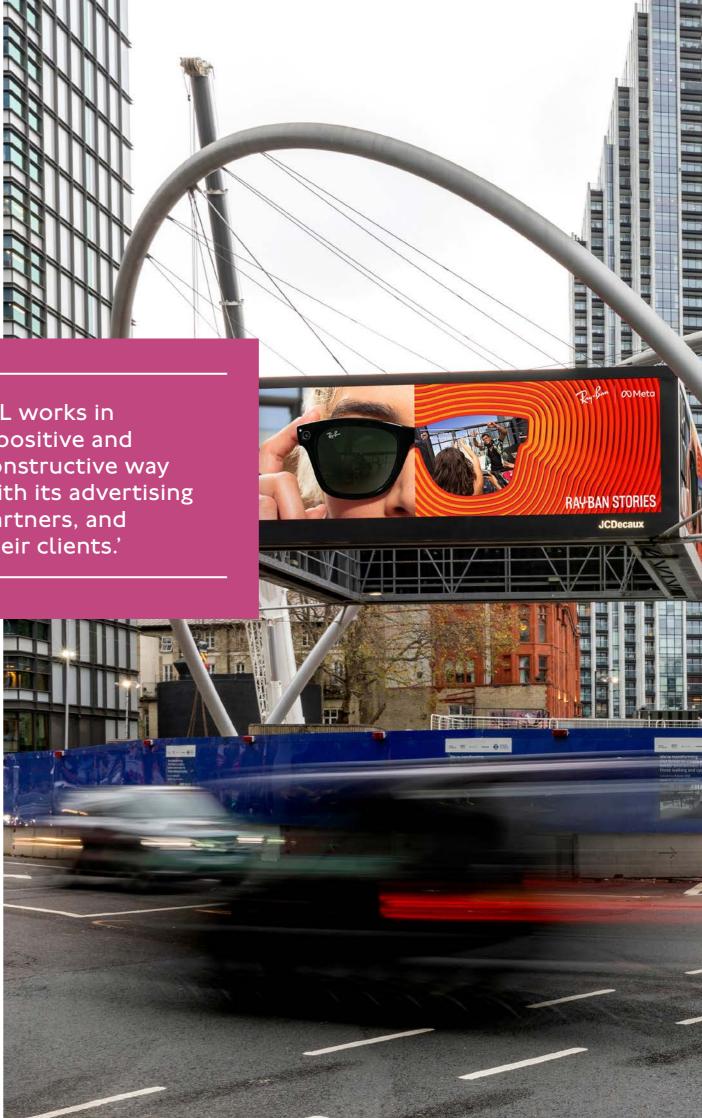
The last financial year has seen TfL's advertising estate returning to near normal with revenue growing. Once again, I would like to thank all members of the steering group, our advertising partners and officers for their hard work, insight, support and guidance. I look forward to another year of work with the Advertising Steering Group.



Dr Mee Ling Ng OBE Chair of the Advertising Steering Group (she/her)



'TfL works in a positive and constructive way with its advertising partners, and their clients.'



Getting the message across

Our advertising estate in 2022/23



2,606 entertainment and leisure campaigns delivered (top three category) **2,071** Government, political and social campaigns delivered (top three category)





1,528 business and industrial campaigns delivered (top three category)



EI30m

for the year¹

£10m for all partnership work²



- 1 Commercial Media income includes: advertising, commercial partnerships, filming and photography, and brand licensing
- 2 Partnerships income includes: the London Cable Car, Santander Cycles and short-term campaigns, such as renaming a station for 24 hours



Creative campaigns

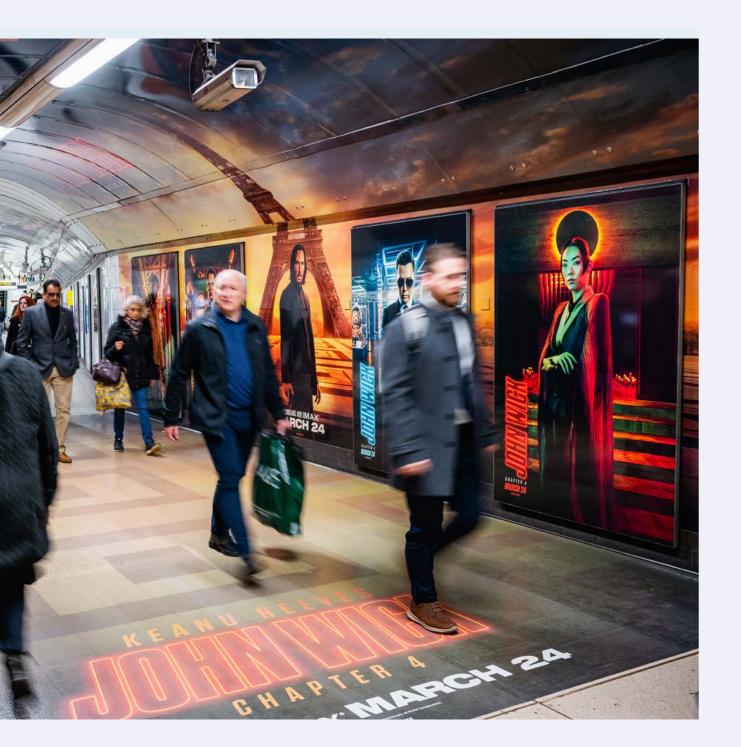
Brands utilise our unique advertising spaces to create exciting campaigns



Eye-catching visuals

John Wick 4

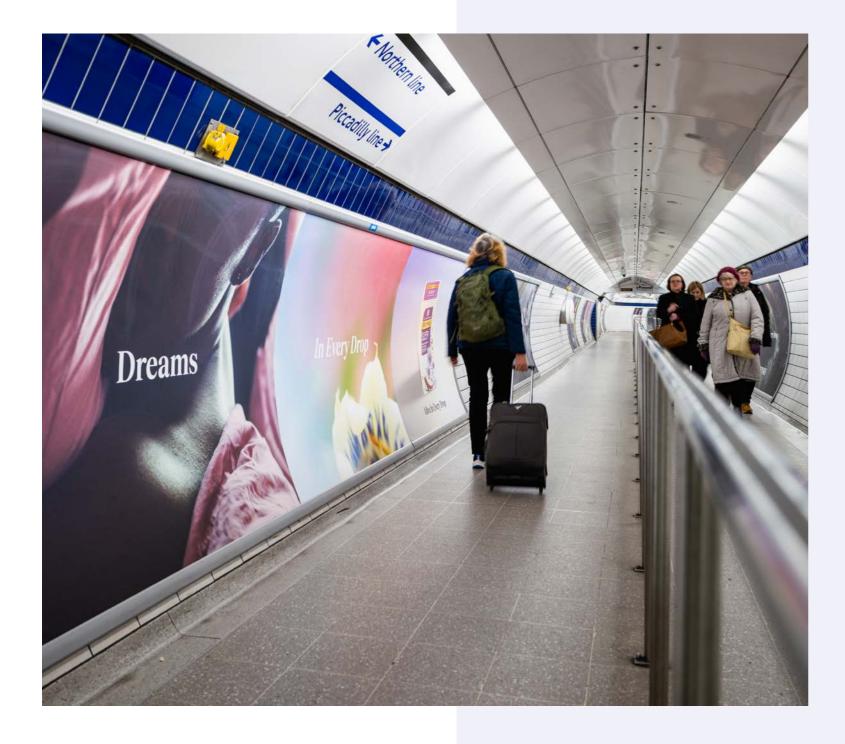
Film franchise John Wick took over Oxford Circus station, immersing commuters into the film's world. The 360° takeover re-introduced our customers to a cast of characters ready for action across a dramatic backdrop.





Charlotte Tilbury

London was treated to Charlotte Tilbury's luxurious gifting campaign, which featured a wrapped corridor at Oxford Circus station and screens that changed image as customers passed by.



Twinings

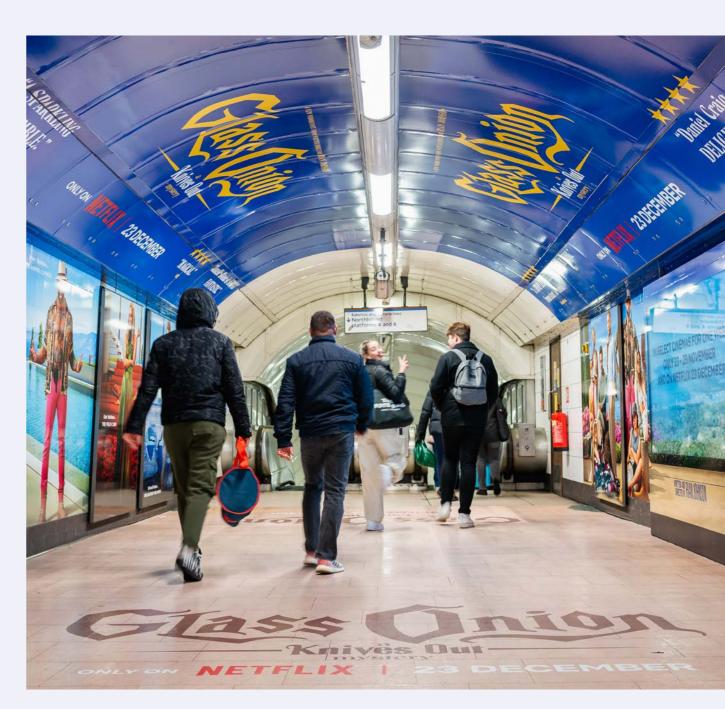
Twinings tea ran a campaign using scented corridors. Promoting its Sleep tea, posters were scented with spiced apple and vanilla flavours, with calming chamomile released along this tube corridor.

In-station wraps

Glass Onion: A Knives Out Mystery

What better way to announce a new film than on the London Underground!

As customers exited through the wrapped tunnels, they came face-to-face with the film's leading characters in this immersive campaign.



.....

Levi Strauss & Co.

Levi Strauss & Co. made a stylish statement to promote its Regent Street store. Oxford Circus station's 5-way exits were covered with the iconic denim fabric and London's famous Routemaster buses were wrapped in Levi's jeans too.

Levi's

LEVIS REGENT STREET NOW OPEN

2325

TUN IN



Taking over the station

Amazon Fresh

Amazon Fresh promoted its local Amazon Fresh store with an Angel station takeover. This campaign ensured customers could see what was on offer in Amazon's grocery store.





Enola Holmes 2

For the second Enola Holmes film, Netflix took over the Waterloo interchange tunnel as well as using sound.

The character played by Millie Bobby Brown, talked to our customers directly from the speakers in the underground.



Our website advertising and Film Office contribute to our income, as well as collaborations with brands through partnerships and brand licensing



Oxford Street Soho Street



Film Office

London is a popular backdrop for television and film production

In 2022/23, filming on our network included: 25 dramas, 25 feature films, 12 online/social media campaigns, II documentaries and six TV commercials.

The London Underground was the most popular mode to film on, with the Elizabeth line and London Overground coming in joint second. Filming locations also included the DLR, the IFS Cloud Cable Car and piers.



Productions on the network in 2022/23:

- 25 feature films
- 25 dramas
- 12 online/social media campaigns
- Il documentaries
- Six TV commercials





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Filming on our network is a unique opportunity

Optimising advertising on our website

Growing online advertising revenue

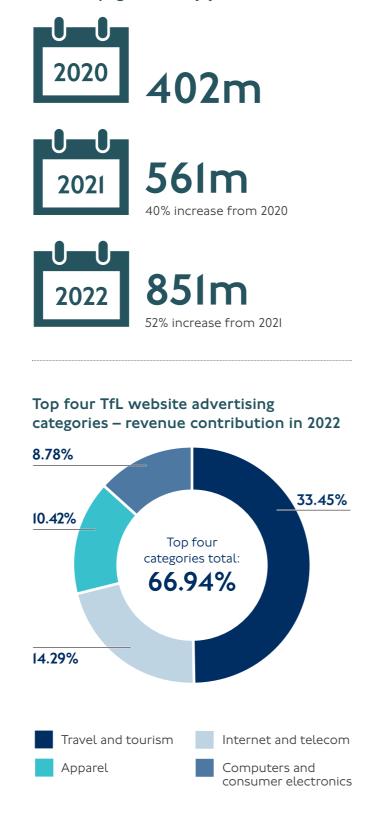
For 2022/23, we achieved an annual revenue of over £I million, with exceptional performance seen in June, November and December. TfL website page views in 2022 more than doubled compared to 2020.

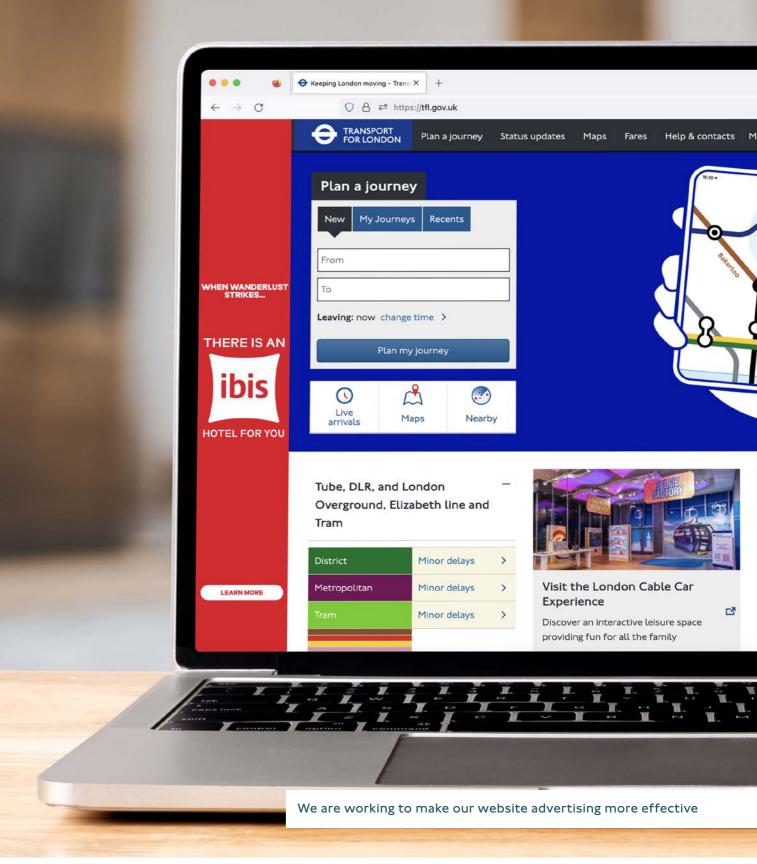
For website advertising, around two-thirds of our revenue is from the top four advertising categories. These categories, ranked by revenue contribution, are: Travel and tourism (33.45 per cent), Internet and telecom (I4.29 per cent), Clothing (I0.42 per cent), and Computers and consumer electronics (8.78 per cent).

We recently implemented a cutting-edge technology that refreshes adverts if they have been in view for 30 seconds. This has resulted in a 30 per cent improvement in viewability and impressions.

We have developed a plan to optimise advertising support for the TfL website in future. The plan has a range of strategic changes aimed at fostering further revenue growth, enhancing sales opportunities and making our website more attractive to advertisers. However, we keep in mind how important it is to preserve a positive customer experience and keep costs low.

Our plan acknowledges that revenue growth for our website will be driven by several key factors, including delivering dynamic high-impact advertising units, achieving high-viewability scores, and monetising all pages where feasible. By fulfilling these requirements, we aim to secure premium sales of advertising space across our website. This shift will enhance the quality and relevance of advertisements for our audience and elevate the overall advertising experience. Website page views by year (2020-22)





Making the most of our intellectual property

Brand licensing

We have some of the most recognisable symbols and images in the world, including the famous Tube map, the iconic roundels, vehicles and seating fabric (moquette) patterns.

We work with an amazing selection of partners, including well-known names from Adidas to Kurt Geiger, to create a range of quality products.



'This was the second collaboration with Kurt Geiger, and it was great to partner with a premium brand to bring a touch of elegance to the Elizabeth line.'



Ellen Sankey Brand Licensing Manager (she/her)

Kurt Geiger Elizabeth line handbag collection

In November 2022, the Kurt Geiger Elizabeth line collection launched. It featured five handbags designed in purple crystal adorned velvet, leather and glitter, all lined with the Elizabeth line moquette. This collaboration helped to establish us as a quality, high-end brand.



Brand licensing offers opportunities for innovative products



Bringing brands together

Commercial partnerships

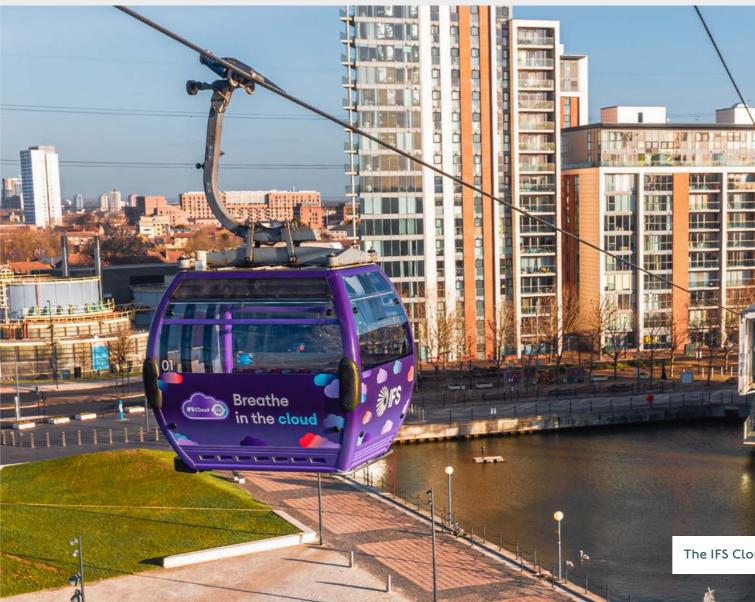
We give brands the unique opportunity to align their campaigns with our worldfamous brand.

London Cable Car – Pokémon week-long takeover

On 19 August, Pokémon took over the London Cable Car for the 2022 Pokémon World Championships at ExCel London. For the first time in European history, the pinnacle of Pokémon tournaments was held in London between 18 and 21 August. The Cable Car cabins were re-branded to represent the 18 different Pokémon types, giving fans a once-in-a-lifetime chance to be transported over the River Thames with their favourite Pokémon. The makeover extended to both Cable Car terminals, with lots of Pokémon surprises, photo opportunities for passengers to enjoy.

Cable Car sponsorship

On 28 June, our 10-year contract with Emirates for sponsorship of the London Cable Car ended. We took the opportunity to modify our commercial approach and actively support delivery of the new vision of the Cable Car as a leisure attraction. We have signed a new non-exclusive two-year contract with IFS a cloud-based technology company, to sponsor the scheme with an option to extend for five years. The contract allows us to secure other partners for long or short-term activities, such as the recent Pokémon week-long takeover of the scheme in August, which brought new customers and promotion of the scheme.



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'The Cable Car is a must-do attraction and demand has been driven by social media activity with people sharing their experiences across social channels, which demonstrates it's perfect for brand activations.'



Harriet McDonald Lead for Commercial Partnerships and Experiential Marketing (she/her)

The IFS Cloud Cable Car is a premium advertising opportunity

Elizabeth line

The Elizabeth line provides new advertising formats for brands and innovative opportunities for brand partnerships



Eastbound platform A 3

Way out ?

Vestbound platform B

Abbey Wook

All stations now open

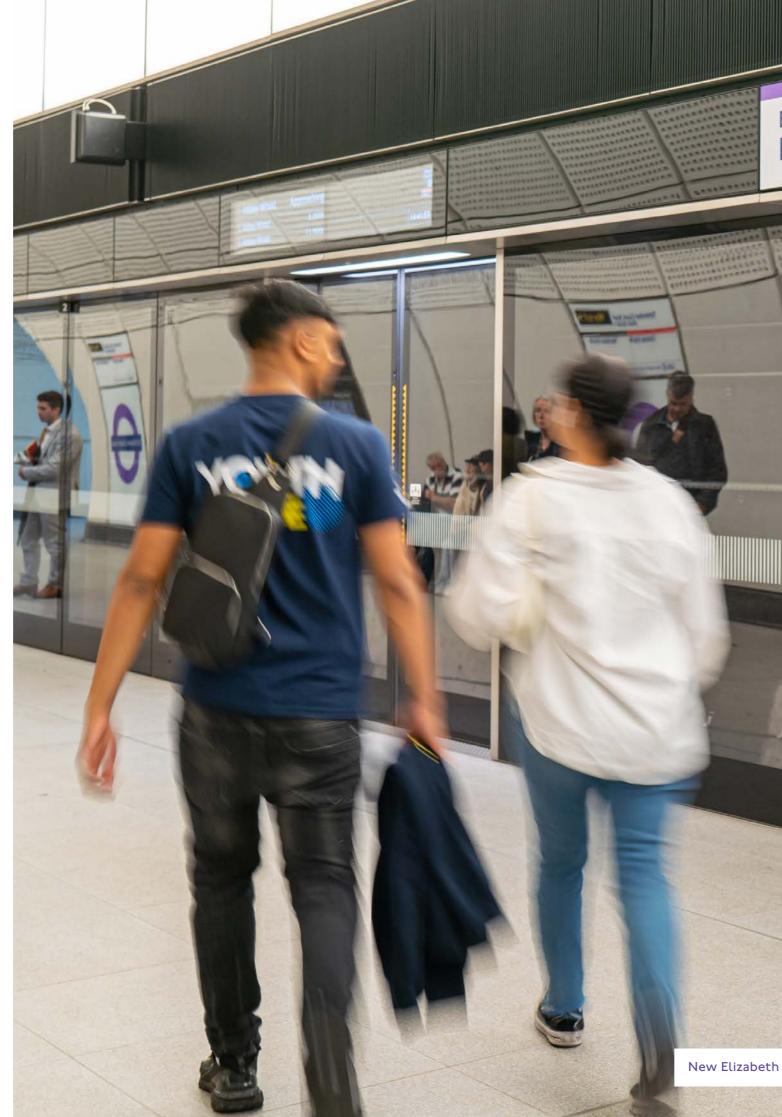
Launch of the line and Bond Street opening

We covered the opening of the Elizabeth line in last year's report, where five launch partners, including Google, Sage and Schwepps, ran prominent campaigns on the advertising assets across new Elizabeth line stations. Bond Street station opening on 24 October 2022 has created more advertising opportunities for brands, including Sephora and Michael Kors.

'With the latest addition to our advertising estate, the Elizabeth line gives brands the opportunity to show off their creativity and get noticed.'



Chris Reader Head of Commercial Media (he/him)

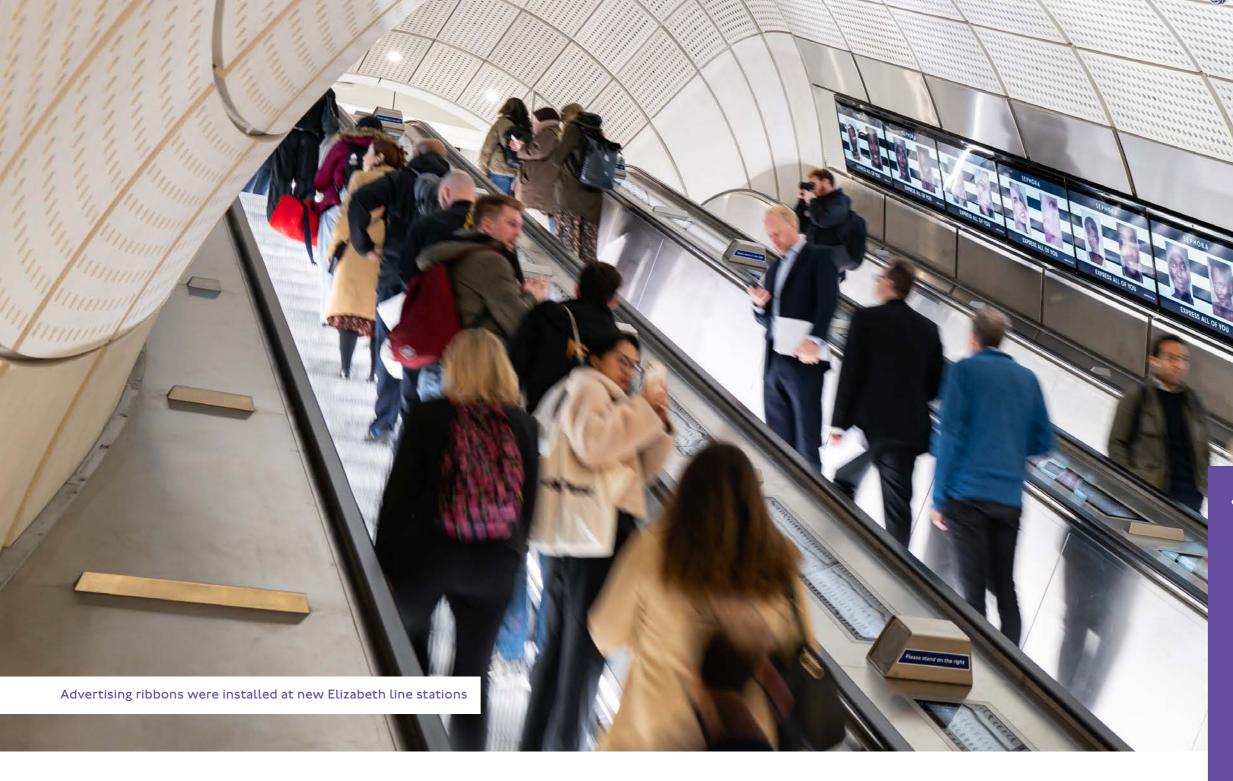


Elizabeth line Eastbound platform A

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New Elizabeth line advertising spaces give creative opportunities



Bond Street station opening

Bond Street Elizabeth line station opened in October 2022. The new station located in the heart of London's West End, has a premium look and feel, offering an attractive, engaging environment for both customers and advertisers. It has attracted some luxury brands to London Underground who have never advertised on the network before. The station's new advertising canvas features two 44-metre-long digital screens, the longest on our network, and a format that allows for clever, eye-catching, creative visuals as passengers make their way up and down the escalators. With millions of customers already using the Elizabeth line, 138 million journeys from when it opened to the end of March 2023, the opening of Bond Street station provides new access to one of the busiest shopping districts in Europe. The new Elizabeth line station has the capacity to cater for nearly 140,000 passengers every day. 'Bond Street, Elizabeth line station has made it much easier for more people to travel to the West End. The station features two 44-metre long digital screens as passengers make their way up and down the escalators, giving brands the opportunity to create eye-catching campaigns.'



John Pizzamiglio Lead for Advertising Strategy (he/him)

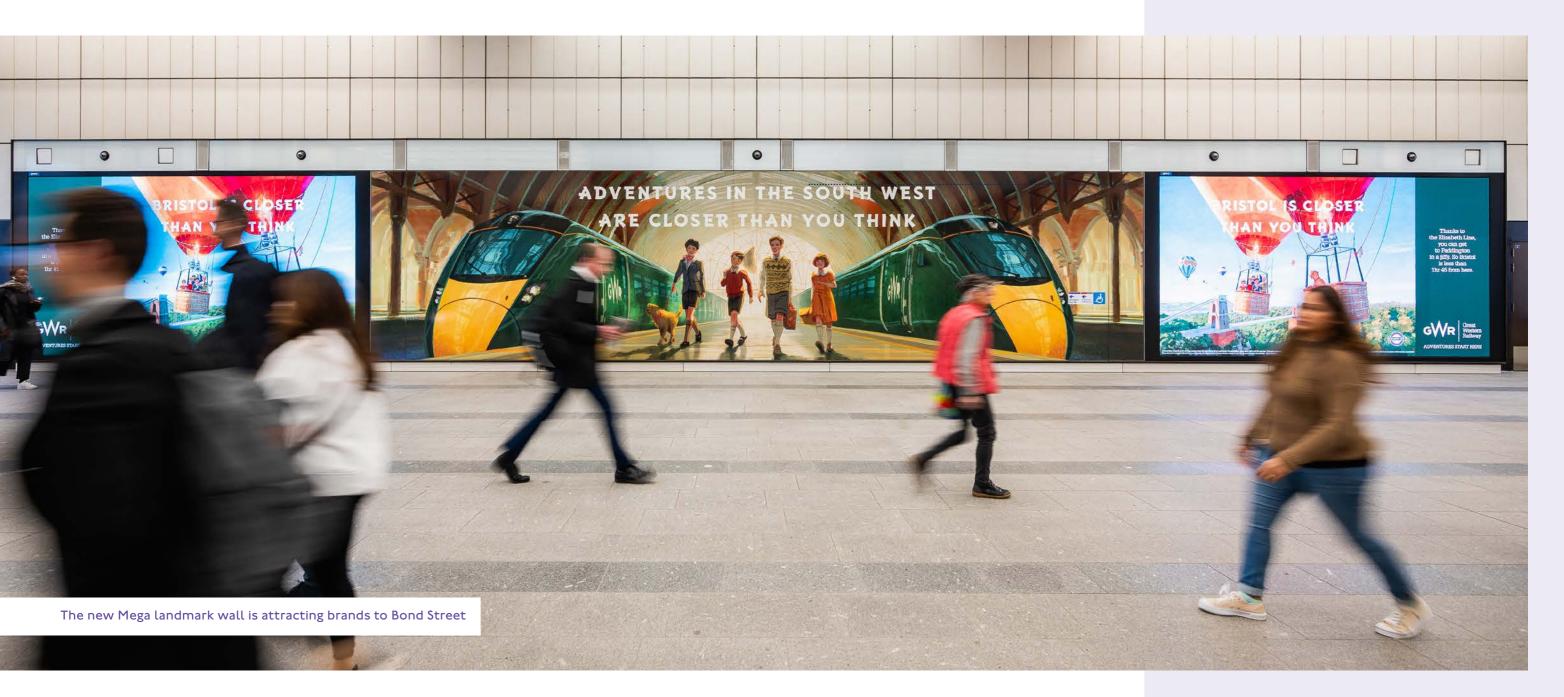
Innovation within stations

Integrated advertising

This year, Global completed the integration of the Elizabeth line into its pioneering digital advertising platform, DAX. Advertisers can now activate data-driven campaigns programmatically on all ultra-HD, videoenabled digital billboards throughout the Elizabeth line, including the new-format platform edge screens, the huge digital posters above the escalators at Tottenham Court Road, Farringdon and Bond Street stations, and every digital escalator panel.



since its opening, to end of March 2023



Bond Street Mega landmark wall

The video walls at Bond Street on the Elizabeth line have enabled us to create the 'Mega landmark wall'; This is a premium advertising opportunity for brands. The first installation went live on 27 March and was for Great Western Railways.

Advertising Annual Report 2022/23





Continuing to evaluate and update our Advertising Policy

All advertising on our estate has to comply with the ASA Codes of Practice and our Advertising Policy which goes further than the advertising codes

All copy that is submitted for display on the advertising estate is reviewed against our Advertising Policy by our media partners in the first instance. If needed, it is sent to us for consideration.

'Working with the ASA we ensure we keep our advertising estate compliant, while offering customers an engaging space.'



Donata MacCrossan Programmes and Policy Manager Commercial Media (she/her)

Working with the ASA

We have regular meetings with the ASA to keep each other updated on emerging issues.

Our close working means we are able to follow any new developments. In 2022/23 we further tightened our approach to cryptocurrency and advertisers now need to be registered with the Financial Conduct Authority. This is on top of advertisements needing to have prominent descriptors stating that cryptocurrencies are unregulated in the UK, cryptocurrency profits may be subject to Capital Gains Tax and that the value of investments is variable and can go down as well as up.

Gambling advertising restrictions

The Greater London Authority (GLA) public health unit commissioned the University of Sheffield and University of Glasgow to produce an independent evidence briefing. This was published in January 2023 and the GLA public health unit are now looking at what further insight is needed, especially evidence around the impact of restricting out-of-home advertising and clarifying how harmful gambling advertising could be defined.

The GLA is exploring the best approach to gathering this insight. Before any restrictions on the network can be implemented, we will ensure that we have engaged with a range of stakeholders.



Environmental claims in advertisements

In February 2023, the Committees of Advertising Practice (CAP) issued environmental guidance about 'carbon neutral' and 'net zero' claims in advertising to ensure advertisements are not misleading. We now require all advertising copy relating to fossil fuel extraction, or copy submitted for brands associated with fossil fuel extraction, to be referred to us for consideration.

In addition, we require all advertising copy which includes an environmental claim to be referred to us for review. Advertisers must ensure that their advertising complies with the latest CAP Code and ASA guidance, and we ask our media partners to continue to verify compliance. CAP advice must be sought on all advertising related to fossil fuel extraction and environmental claims prior to coming to us for consideration.

Campaign management

The advertisements that run on our network must adhere to robust guidelines and rules, and we take all complaints seriously 

Advertising categories

A breakdown of advertising run by market sectors

Category	Number of advertisements
Entertainment and leisure	2,606
Government social and political	2,071
Business and industrial	1,528
Retail	1,521
Finance	815
Media	676
Property	582
Travel and transport	569
Drink	429
Clothing and accessories	379
Cosmetics and personal care	355
Food	308
Pharmaceutical	252
Mail order	215
Computers	206
Electronics, household appliances and technology	173

Category	Number of advertisements
Educations and vocational	167
Household equipment and DIY	159
Leisure equipment	146
Telecommunications	116
Online retail	110
Charities	96
Miscellaneous	88
Multi advertisers	73
Motors	56
Luxury goods	51
Recruitment classified	38
Tobacco and accessories	36
Medical	34
Gardening and agriculture	24
Sports	24
Household fast moving consumer goods	17
Total	13,920



Managing our campaigns

A breakdown of the complaints we received and the campaigns we have declined

The complaints we receive directly cover a wide range of topics. A small number of specific advertisements tend to generate the majority of the complaints we receive. Due to the nature of some complaints, it is not always possible to identify the exact advertisement a complaint relates to or if it ran on TfL's estate. Overall, we receive a low number of complaints given the large number of campaigns and individual advertisements we run.



advertisements were subject to ASA complaints (one complaint was upheld)





 These adverts were fly posted – they were not approved by TfL or our advertising partners, nor would they have been approved if they were submitted to us. These posters were an act of vandalism which we take extremely seriously. Upon hearing of the posters, we instructed our contractors to remove any of these posters found on our network

Advertising campaigns that received complaints in 2022/23

Advertisement	Number of complaints
Emerging Pakistan	186
Estrid	108
OneUK	41
Not known	27
Airtasker	17
88Vape	15
MISSD	10
Ekol International Hospitals	8
Ikea	6
Roam	6
Durex	5
EE Hope United	5
Genie Connections	5
Hinge	5
McDonald's	5
Safuu	5
Dispenseroo*	4
Maison Sport	4

Advertisement	Number of complaints
Oatly	3
BAE Systems	2
Dentakay	2
etc Venues	2
FIFA World Cup Qatar 2022	2
Floki	2
God Loves You Tour	2
Intimissimi	2
Lockheed Martin	2
Netflix	2
Prey for the Devil	2
Prophet Muhammad	2
Shen Yun	2
Smile (film)	2
Strongbow	2
Тгоріс	2
Allauion	1
American Express	1

Advertisement	Nu cor
Angel by Mugler	
BBC	
Bishop	
The Black Phone	
Bloodbath	
Blu Vapes	
Burger King	
Calvin Klein	
Come to Jesus app	
Compare the Market	
Elf Bar	
Emirates Air Line	
GenV	
Hard seltzer	
Have a Word	
Hex	
Human Appeal	
Jack Daniel's	
KFC	

umber of mplaints

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Advertisement	Number of complaints
Marc Jacobs	1
Meet Mates	1
M3GAN	1
Met Police	1
Mindler	1
Mouth to Mouth by Antoine Wilson	1
New York Tourism	1
Nordic Spirit	1
Pedal Me	1
Pratt & Whitney	1
PrettyLittleThing	1
Randox Health	1
The Black Experience	1
Subhan Allah – Ramadan	1
Thisworks	1
UKND	1
Vuse	1
Total	533

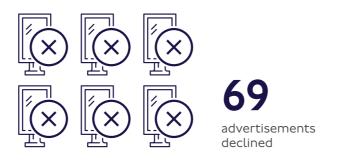
All advertisements that run on our transport network must adhere to our Advertising Policy and comply with the ASA guidelines. Any complaints we receive are taken seriously.

In 2022/23, we received 533 complaints about advertising campaigns. It should be noted that some of these are not related to specific advertisements nor can they be attributed to a specific advertising asset. As such, the number and nature of complaints received varies from the number and nature received by our media partners.

We also report the number of complaints the ASA receives on advertisements that have run on our advertising estate.

Complaints to the ASA

ASA Complaints Advertiser – 2022/23	Result of appeal
Heineken UK Ltd	Not Upheld
Sky	Upheld



We work together with brands to help them alter their advertisement copy to ensure it complies with our policy. In many cases, mainly when it comes to creatives for products high in fat, sugar and salt, clients who cannot confirm the compliance of a product, will choose to run a different creative.

The table shows the number of campaigns declined by us after reviewing against our policy. It should be noted, that our media partners also undertake their own copy review and can decline copy without consulting us, which is not recorded in this table.

Reasons for declined advertisements

TfL Advertising Policy clause

2.3(a) it is likely to cause widespread or serious offence to reasonable members of the public

2.3(b) Depicts adults or children in a sexual manner or display nude or semi-nude figures in overtly sexual context

2.3(c) Could reasonably be seen as distasteful, indecent or obscene

2.3(d) Could reasonably be seen as likely to cause pressure to conform to an unrealistic or unhealthy body shape

2.3(h) Contains images or messages which relate to matters public controversy or sensitivity

2.3(i) it refers to or portrays (or gives the impression of portraying) a living person.

2.3(j) contains negative reference to TfL services

2.3(n) it promotes a party political cause or electioneering

2.3(p) promotes food or non-alcoholic drink which is high in fa salt and/or sugar (HFSS)

2.3(q) unacceptable for some other substantial reason (which TfL will identify and explain as reasonably required)

Total

	Frequency
	1
ays	4
	8
	5
of	7
	5
	I
	1
at,	22
	15
	69

Advertising Steering Group

The Advertising Steering Group provides strategic advice and guidance on our Advertising Policy. The group helps to ensure our Advertising Policy remains relevant and up to date, while also discussing wider policy and advertising issues and how we can engage with the industry and customers through advertising.

The group met on I0 November 2022 to discuss complaints, current issues surrounding advertising for the FIFA World Cup 2022 being held in Qatar, and to get an update on the gambling advertising restrictions. Minutes of the meeting are published on our Commercial Media page on our website.

Meetings for next financial year have been organised for May 2023 and November 2023. These will be reported on in next year's report. As mentioned in the Chair's message, two new members joined the Advertising Steering Group, we have featured them here, but it should be noted that they joined in May 2023.

Membership group



Dr Mee Ling Ng TfL Board Member (Chair) (she/her)



Professor Phillippa Diedrichs Professor of Psychology, University of the West of England (she/her)



Seb Dance Deputy Mayor for Transport (he/him)



Marty Davies Joint CEO of Outvertising (they/them)



Sarah Brown Mayoral Director, Communications (she/her)



Tom Knox Chairman of MullenLowe and former President of the Institute of Practitioners in Advertising (he/him)



Shani Dhanda Disability Inclusion and Accessibility Specialist (she/her)

26



Contact us

To send feedback or to complain about an advertisement, visit <u>tfl.gov.uk</u>

Call our 24-hour contact centre on 0343 222 1234

Or write to:

TfL Customer Services 9th Floor 5 Endeavour Square London E20 IJN

About us

Part of the Greater London Authority family led by Mayor of London Sadig Khan, we are the integrated transport authority responsible for delivering the Mayor's aims for transport. We have a key role in shaping what life is like in London, helping to realise the Mayor's vision for a 'City for All Londoners' and helping to create a safer, fairer, greener, healthier and more prosperous city. The Mayor's Transport Strategy sets a target for 80 per cent of all journeys to be made by walking, cycling or using public transport by 2041. To make this a reality, we prioritise safety, sustainability, health and the quality of people's experience in everything we do.

We run most of London's public transport services, including the London Underground, London Buses, the DLR, London Overground, Elizabeth line, London Trams, London River Services, London Dial-a-Ride, Victoria Coach Station, Santander Cycles and the IFS Cloud Cable Car. We manage the city's red route strategic roads and are responsible for the maintenance, management and operation of more than 6,000 sets of traffic lights across the capital. The London boroughs are responsible for all the remaining roads within their boundaries. The experience, reliability and accessibility of our services are fundamental to Londoners' quality of life. Safety remains our number one priority and we continue to work tirelessly to improve safety across the network for both colleagues and customers.

Our vision is to be a strong, green heartbeat for London. We are investing in green infrastructure, improving walking and cycling, reducing carbon emissions, and making the city's air cleaner. The Ultra Low Emission Zone, and fleets of increasingly environmentally friendly and zero-emission buses, are helping to tackle London's toxic air. We are also improving public transport options, particularly in outer London, to ensure that more people can choose public transport or active travel over using their vehicles. That is why we are introducing the outer London Superloop bus network, providing express bus routes circling the entire capital, connecting outer London town centres, railway stations, hospitals and transport hubs.

We have constructed many of London's most significant infrastructure projects in recent years, using transport to unlock economic growth and improve connectivity. This includes major projects like the extension of the Northern line to Battersea Power Station and Nine Elms in south London, as well as the completion of the London Overground extension to Barking Riverside and the Bank station upgrade.

The Elizabeth line, which opened in 2022, has quickly become one of the country's most popular railways, adding 10 per cent to central London's rail capacity and supporting new jobs, homes and economic growth. We also use our own land to provide thousands of new affordable homes and our own supply chain creates tens of thousands of jobs and apprenticeships across the country.

We are committed to being an employer that is fully representative of the community we serve, where everyone can realise their potential. Our aim is to be a fully inclusive employer, valuing and celebrating the diversity of our workforce to improve services for all Londoners.

We are constantly working to improve the city for everyone. This means using information, data and technology to make services intuitive and easy to use and doing all we can to make streets and transport services accessible and safe to all. We reinvest every penny of our income to continually improve transport networks for the people who use them every day. None of this would be possible without the support of boroughs, communities and other partners who we work with to improve our services. By working together, we are creating brighter journeys and a better city.

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