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Foreword

Our estate offers brands a unique opportunity

Transport for London (TfL) has one of the largest advertising estates in the world. Faced with the pandemic over the last few years, we have had to adapt our approach to the needs of our customers, advertisers and brands. As the city recovers, we are thrilled that in the financial year 2021/22 we had more than I40 million customers, and currently we are seeing an average of 70 per cent of customers per week back on our network in comparison to pre-pandemic levels. Over the last year, we have reached some exciting milestones, enabling us to continue to bounce back from the pandemic and expand our advertising offer.

With our out-of-home advertising estate and the diverse Londoners who see it, we believe we have a duty to display responsible advertising. We are continuously investing in our estate to ensure it is not only one of the largest in the world, but also cutting edge, diverse, forward thinking and sustainable.

In 2021/22, we saw the first increase in revenue from our commercial media activities since the pandemic hit. By investing in our advertising infrastructure, we offer brands exciting and innovative opportunities, generating revenue that is then reinvested into improving the transport network.

September 202I saw the launch of the Northern Line Extension and two new Zone I stations at Battersea and Nine Elms. More recently, in May this year we launched the central section of the Elizabeth line between Paddington and Abbey Wood. Both projects showcase our state-of-the-art advertising infrastructure and provide brands with innovative ways to promote their products.

In February 2022 it was three years since we implemented the advertising restrictions on foods and non-alcoholic drinks high in fat, sugar or salt. The success of these restrictions was highlighted in new research published in February 2022 from The London School of Hygiene & Tropical Medicine. The research used data from two million grocery purchases of products high in fat, sugar or salt to examine the effect of the policy.

This report highlights the investment we have made into our advertising assets, and shows some campaigns that have featured on our network. It also covers how we have been working to strengthen our Advertising Policy, and gives an update on the Advertising Steering Group.

To achieve all this requires close collaboration between us, our advertising partners, including Global and JCDecaux, and the advertising industry. I would like to take this opportunity to thank our advertising partners and the Advertising Steering Group, chaired by Dr Mee Ling Ng, who have continued to provide us with valuable expertise and support.

If you have any views on our Advertising Policy, or even just on an advertisement you have seen on our estate, please get in touch. We take all ideas, suggestions and complaints seriously. They all go towards creating a better network and help improve the experience for all our customers.



Julie Dixon
Director, Customer and Revenue

'We are continuously investing in our advertising estate to ensure it is not only one of the largest in the world, but also cutting edge, diverse, forward thinking and sustainable'



Message from the Chair

We ensure advertising is inclusive, safe and fair

TfL's Advertising Steering Group oversees the implementation of its Advertising Policy and gives an external view on any issues. As Chair of the Advertising Steering Group, I continue to learn a lot about the work being done and TfL's decision-making processes to successfully manage its dynamic, developing and vast advertising estate. We work to ensure that TfL has a robust, up-to-date and clear Advertising Policy that recognises and addresses London's diversity and aims to keep its customers safe.

At our meeting in March 2022, we were given an update on the work TfL and the Greater London Authority (GLA) are doing on the gambling advertising ban. We also discussed cryptocurrency advertising and how TfL is meeting regularly with the Advertising Standards Authority (ASA) and Financial Conduct Authority (FCA).

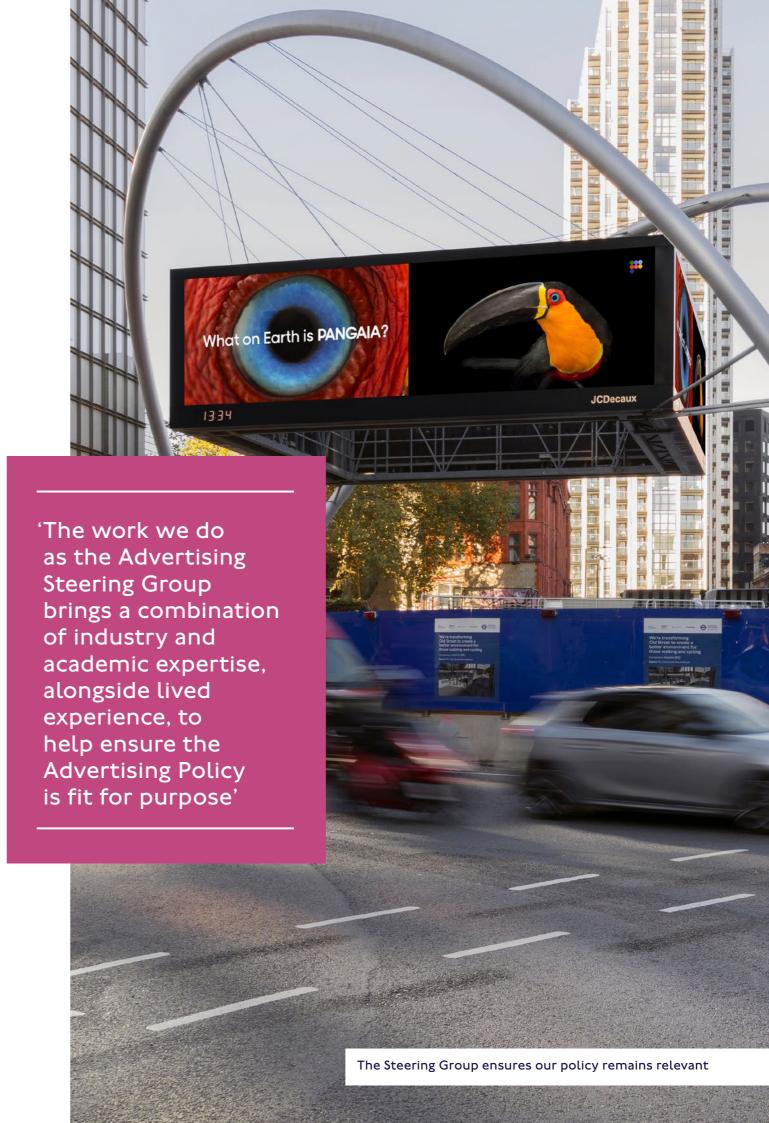
The work we do as the Advertising Steering Group brings a combination of industry and academic expertise, alongside lived experience, to help ensure the Advertising Policy is fit for purpose.

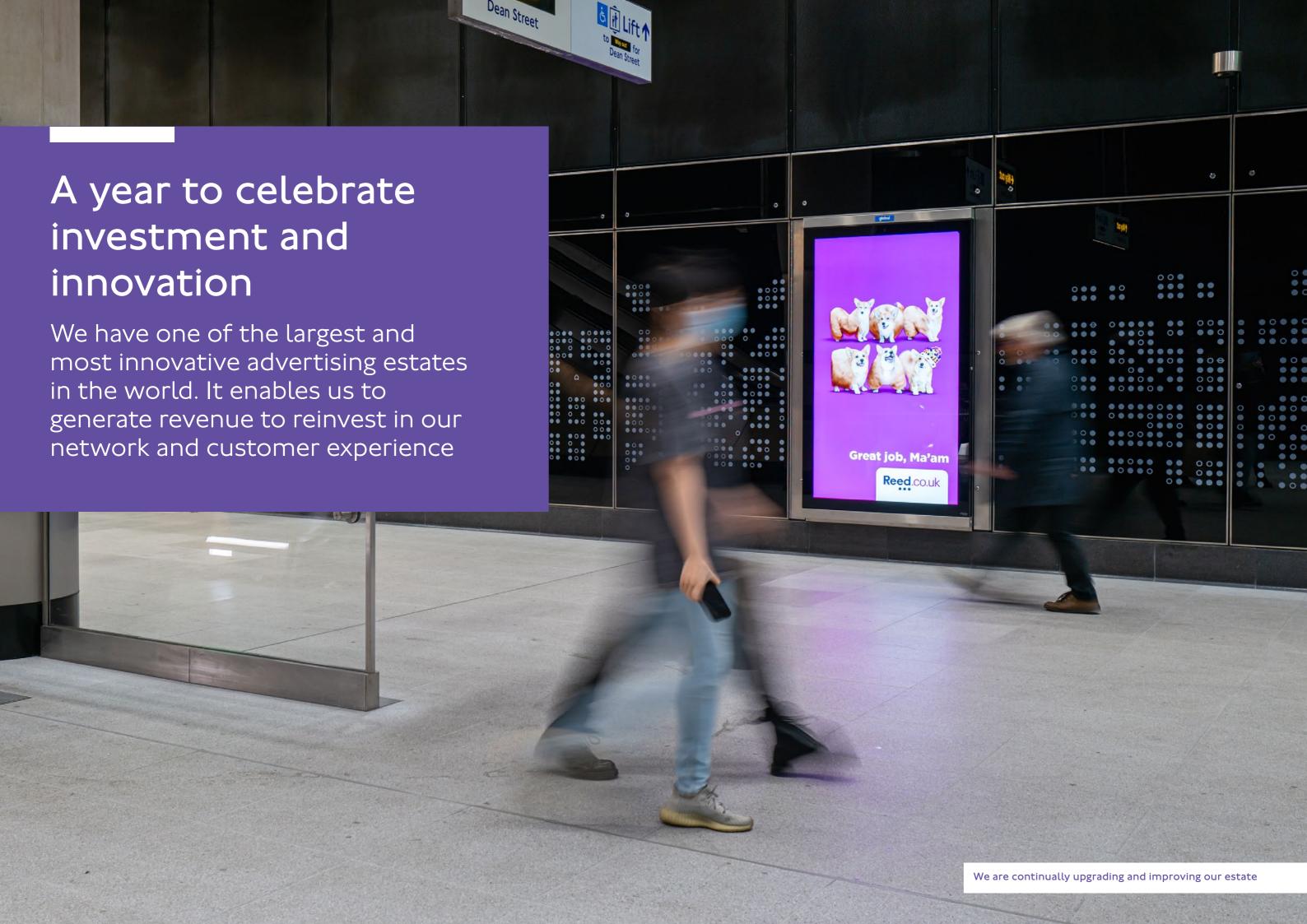
It has been great to see the TfL advertising estate start to recover from the pandemic, as we continue to welcome more customers back on to the transport network. We've also seen a compelling range of creative campaigns on the network this year.

I would like to thank members of the group, and TfL's advisors and advertising partners for their continued support and guidance. I look forward to future meetings and the discussions that will take place.



Dr Mee Ling Ng OBEChair of the Advertising Steering Group





Widening our scope

We are constantly modernising our estate to provide cutting-edge opportunities for advertisers

In 2021/22 we generated £97m from commercial media activities, which includes advertising, commercial partnerships, filming and photography, and brand licensing.

We continuously look to invest in our estate. During the last year, we have completed a six-year programme of investment that has modernised and upgraded our advertising infrastructure across the network. Most recently, this can be seen in the new advertising opportunities presented by the Northern Line Extension, which opened two new Zone I stations, as well across the transformational Elizabeth line.

These two developments continue to shape the very city itself, and for advertisers they bring new audiences and opportunities for brands, who already appreciate the impact that we can bring to their campaigns.

The scale of these initiatives has been daunting, but brilliantly delivered by our team of designers, engineers and technicians. The Elizabeth line itself brought 329 new advertising assets to the market in one day; the largest single introduction of out-of-home advertising assets for a generation.

Comprising both digital and traditional formats, these new assets underline our commitment to maximise revenue by providing brands with innovative advertising opportunities in spectacular new environments.



Bigger and bolder delivery

Our advertising in 2021/22

1,924

Government, political and social campaigns delivered (top three category)





1,204

business and industrial campaigns delivered (top three category)



campaigns delivered (top three category)





11,262



£97m

commercial income for the year

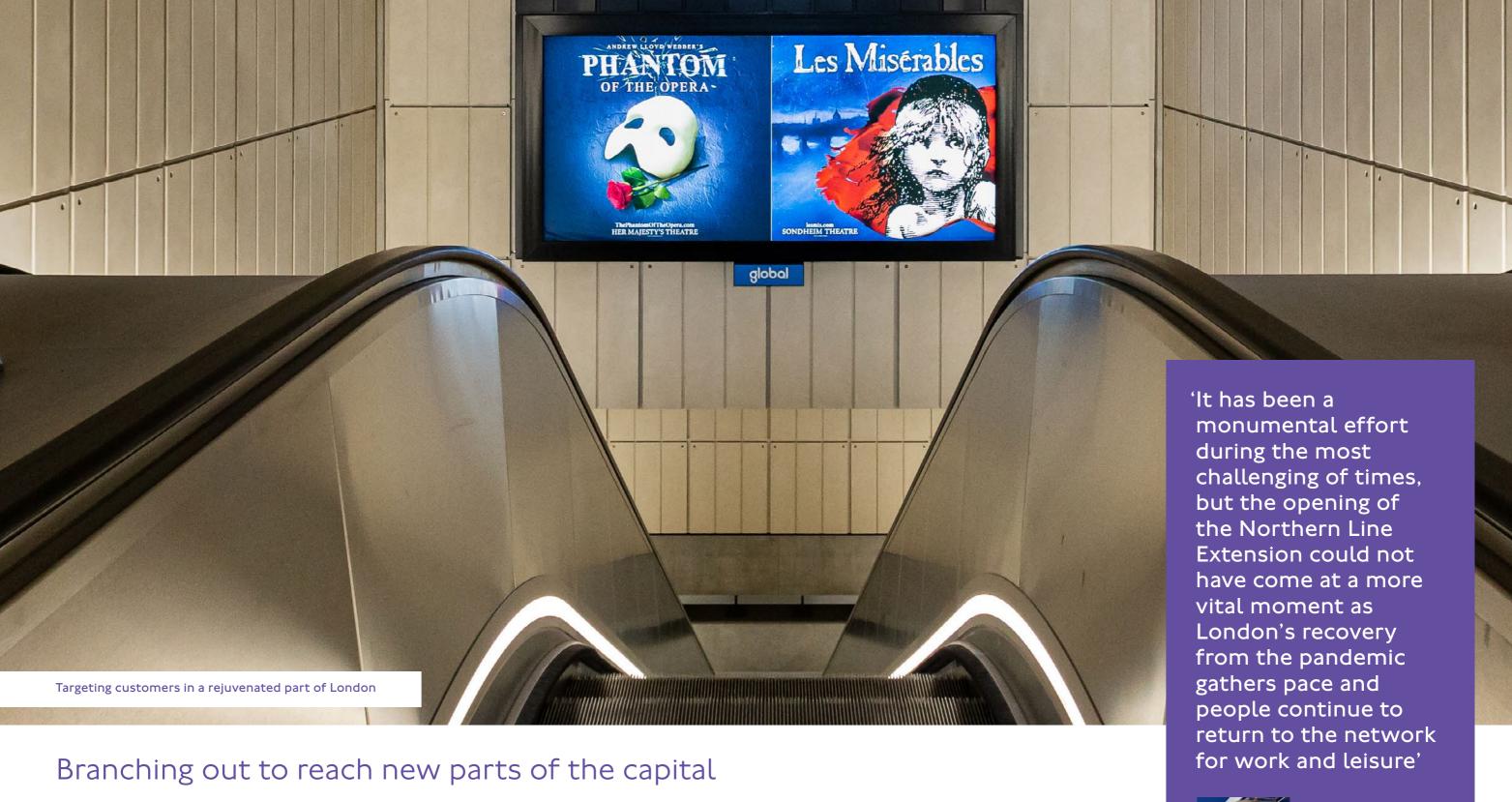




£11.35m

for all partnership work





Northern Line Extension

Battersea Power Station and Nine Elms are the first new London Underground stations in the capital since 2008.

The extension showcases our latest advertising infrastructure, but importantly brings new audiences to our advertisers

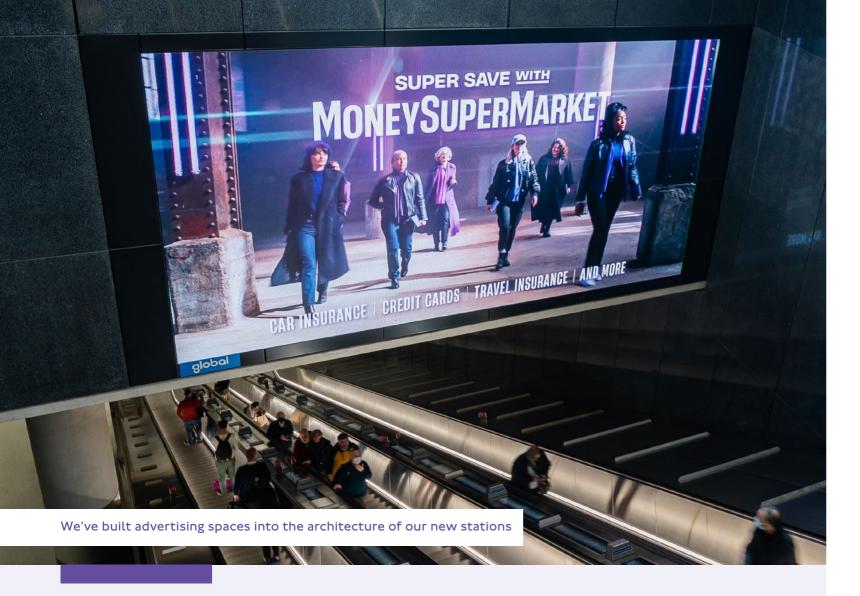
in parts of London that were not previously served by our transport network. The new stations provide open environments that are fantastic spaces to illustrate how brands can reach our customers in a thriving part of rejuvenated London.



opened, the first new London Underground stations since 2008



Andy Lord Chief Operating Officer

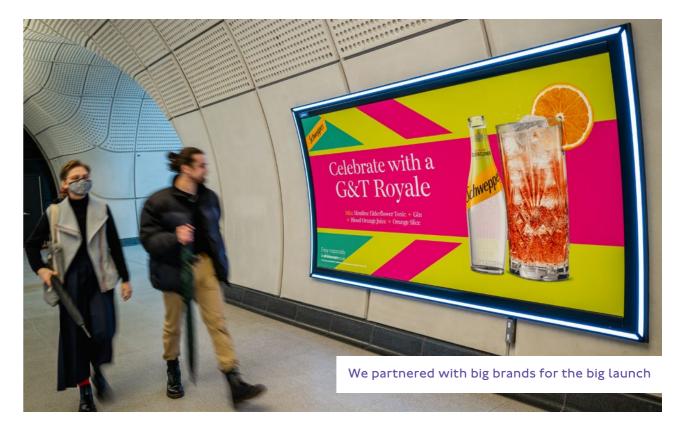


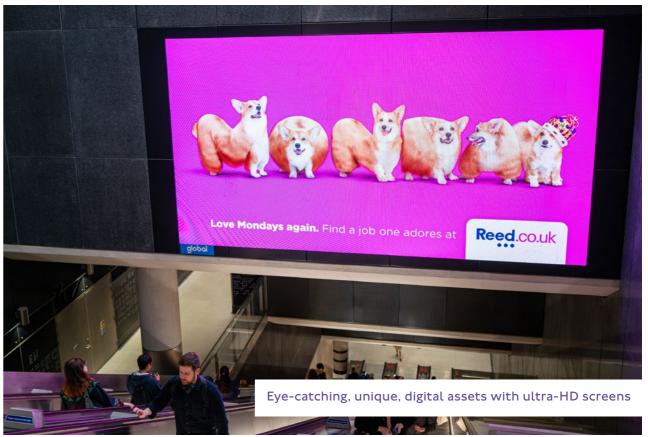
The Elizabeth line launch

This ground-breaking addition to our estate provides advertisers with access to the latest digital assets

Although the launch of the Elizabeth line is not strictly covered by our reporting period, we could not miss an opportunity to cover all of the great work that we have done with our media partner Global to attract big brands to be the first to advertise. The new railway not only further expands our advertising estate, it also provides new advertising formats for brands as well as creating innovative opportunities for brand partnerships.

Advertising opportunities are at the heart of the new railway, as we have worked with Global to enable advertising to be embedded into the architecture of the new stations. The Elizabeth line saw the biggest single introduction of out-of-home advertising assets for a generation as it features 329 new state-of-the-art advertising sites. These include a wide range of digital assets, as well as enhanced versions of the more traditional formats.



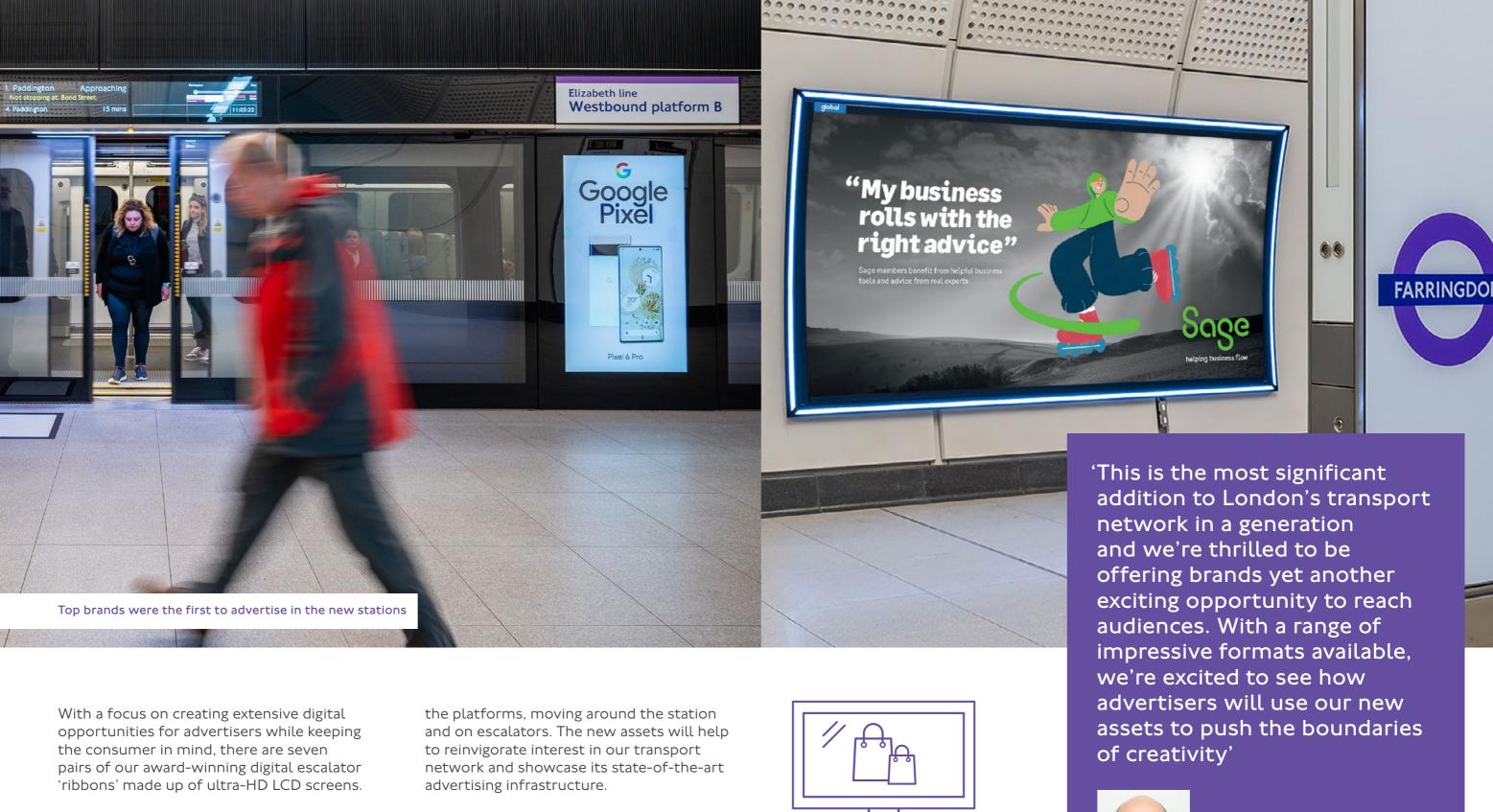








329
new state-of-the-art advertising sites



Also featured across all the new stations are four ultra-HD digital gateway screens, which includes three videowalls and 32 new, larger, 86-inch digital billboards. Exclusive to the Elizabeth line are 75-inch digital screens, that have been integrated into the platform-edge doors to create 16 new-format digital runways along the platform. These host full-motion ultra-HD content that customers can watch while on

In the run up to the launch, we worked closely with Global to host a large number of stakeholder visits to highlight these new bigger, brighter and bolder advertising opportunities offered to potential brands. These were well received, with Reed.co.uk, Google, MoneySuperMarket, Sage and Schweppes being the first brands to advertise on the new railway when it opened in May.



new-format digital runways with fullmotion content

86-inch digital billboards



Chris Reader Head of Commercial Media



Getting the show back on the road

Through the #BackOnStage campaign and our partnership with Dettol, we encouraged Londoners and visitors to return to the city



Helping theatres get #BackOnStage

After being closed for more than a year, the Society of London Theatre decided to herald the safe reopening of the city's theatres on 17 May 2021 with its first ever industry-wide outdoor advertising campaign, #BackOnStage.

The campaign aimed to encourage Londoners and visitors safely back to the capital's theatres as shows reopened in the summer and early autumn of 2021, and it was displayed across stations in Zones I-2. It featured poignant images captured from the theatre wings, recreating the unique sense of anticipation and excitement that a live show brings, as well as showcasing a range of more than 40 shows set to reopen following the pandemic.



by advertising with us

Confidence in our existing partnerships with brands continued to grow in 2021. Despite Government restrictions easing and customer confidence in using our network steadily returning, in January 2021 Dettol decided to extend its partnership with us until January 2023. Dettol's decision to continue to supply free hand sanitiser at 1,286 hand sanitising points across all our transport modes is excellent news and a show of reassurance to our customers as our ridership numbers continue to rise.

'This timely and inspired partnership with Dettol is a great example of how we work with brands to create campaigns that add value to our customers. support our messaging and generate income for TfL'



Harriet McDonald Lead for Commercial Partnerships and **Experiential Marketing**



Turning heads with a popular partnership

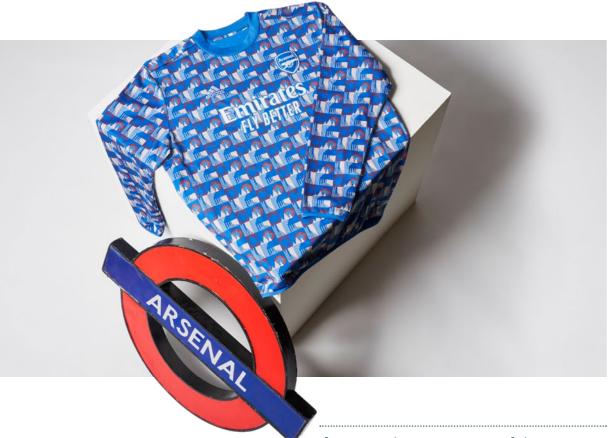
Following a two-year break, ITV chose part of the TfL network to let fans and commuters alike know about the return of the summer dating show Love Island in 2021. Eight special roundels at Oxford Circus were decorated and transformed with the Love Island branding.

In the run up to the show's return, from 24 to 28 June, customers using Oxford Street station heard Tannoy announcements by the well-known voice of comedian and

Love Island narrator Iain Stirling. As well as voicing our usual safety announcements to customers such as reminding them to mind the gap, continue to social distance, and hold escalator handrails, additional announcements included famous straplines such as 'don't couple up!'

This sponsorship agreement exemplified how brands can use our network to reach specific audiences, while also reinforcing our own safety messages to customers.

Customers using **Oxford Street** station heard Tannoy announcements by the well-known voice of comedian and Love Island narrator Iain Stirling



'This unique partnership with Adidas and Arsenal inspired by the Piccadilly line moquette demonstrates the innovative opportunities partnerships can bring'



Ellen Sankey
Brand Licensing Manager

A premier partnership

In the first collaboration of its kind, Arsenal football club has taken inspiration from moquette, the iconic woollen seating material used on our trains and buses, to launch a new pre-match kit.

The colourful design was inspired by the moquette pattern used on the Piccadilly line Tube trains that stop at Arsenal station, where customers can disembark to reach the Emirates Stadium, home to Arsenal FC. The club collaborated closely with us and sports brand Adidas to develop an eye-catching design fit to be worn by the Gunners.

Arsenal fans were spoilt for choice with five different items available, including jerseys and sweatshirts sporting the Arsenal and Piccadilly moquette design.

The merchandise was first modelled by footballers from Arsenal's men's and women's teams in January 2022, before it was made available for fans to purchase online.

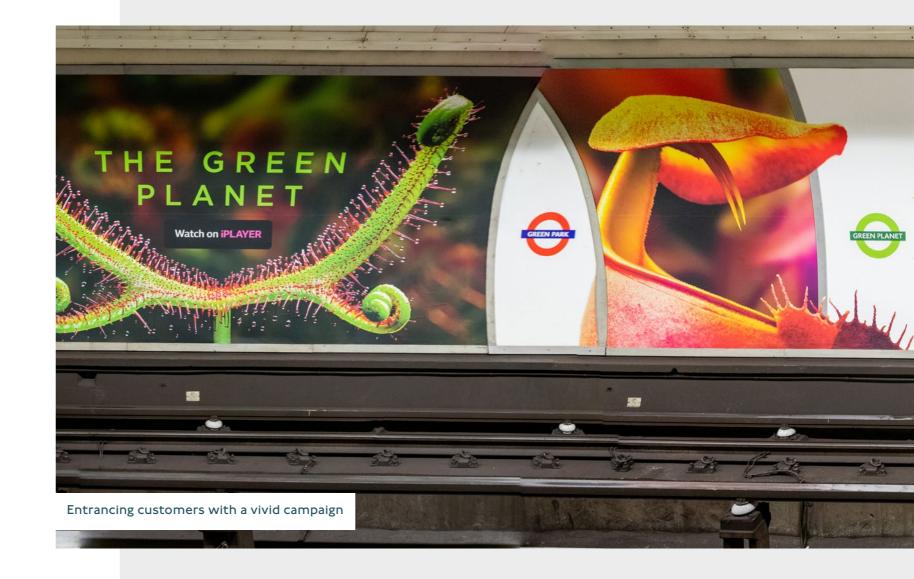
Creative collaborations to catch the eye

Green Planet at Green Park

We celebrated the launch of Sir David Attenborough's latest series on 9 January 2022, The Green Planet, by transforming Green Park into a vivid experience celebrating the vast array of plant life featured in the series.

The Zone I station was rebranded to 'Green Planet' to create an immersive experience for our customers. Every poster site across

the southbound Victoria line was utilised to display the various plant life featured in the series as part of the wider campaign. We also had two digital screens showing the trailer from the five-part series. This was another exciting opportunity for us to highlight our unique and extensive range of advertising assets across the network and the opportunities that brands can have by partnering with us.



Restoring customer confidence

Creative campaigns to encourage people back to a thriving London



Bus wraps

Our creative campaigns and partnerships are not just limited to the Underground. We worked with Global to wrap 420 buses in the last year. As part of this we have collaborated with brands such as Calvin Klein, Michael Kors, Ocado, New Balance and many more.



420 buses wrapped in 2021/22



Supporting the Mayor's Let's Do London campaign

In July 2021, we supported the Mayor's Let's Do London campaign. As the Government lifted lockdown restrictions, we launched an integrated advertising campaign to remind our customers of what they'd missed and once again instill in their minds how our transport network plays an integral part in helping them reach their leisure and entertainment destinations in the capital.

As well as posters, newspaper and radio advertisements, we launched a TV advertisement and used our iconic roundels located at specific stations, transforming

these from named stations to slogans such as 'Going out out' at Shoreditch High Street; 'Retail Therapy' at Bond Street; 'Opening Night' at stations located in the West End; and 'Best Day Ever' at Gloucester Road.

The campaign, which was in collaboration with London & Partners, was well received by customers, business groups, and the entertainment, retail, tourism and leisure industries. To entice customers back to the city, it reminded Londoners of the diverse and exciting range of activities the capital has to offer.



We continue to evaluate and update our bespoke Advertising Policy

All advertising on our estate is governed by the ASA Codes of Practice

Gambling advertising restrictions

In his 2021 re-election manifesto, the Mayor pledged to bring forward plans to ban 'harmful' gambling advertisements on our network. We understand that we play a crucial role in the health of all Londoners, and it is important for us to support the creation of a healthier and safer London, which are key aspects of the Mayor's Transport Strategy.

The GLA Health team has commissioned an independent review of the research to develop an evidence base on harmful gambling. This evidence base is necessary to be able to further develop the policy and we plan to carry out engagement with a range of stakeholders ahead of any final decisions on restrictions being implemented.

Cryptocurrency advertising

Cryptocurrency investment is an emerging and unregulated market and we have been working with the FCA and the ASA on this category of advertising. Currently, all advertising of cryptocurrencies is referred to us for approval, and must comply with the recently published Enforcement Notice from the ASA.

Any advertisements related to cryptocurrencies that we display on our transport network have to clearly show the required disclaimers, warning potential investors of the risk they may be taking.



Restricting products high in fat, sugar or salt on our advertising estate

On 25 February 2022 we marked the third anniversary of implementing guidelines to restrict the advertising of foods and non-alcoholic drinks that are high in fat, sugar or salt across our estate. The restrictions reflect the requirements of the Mayor's London Food Strategy and were assessed using the Public Health England nutrient profiling model.

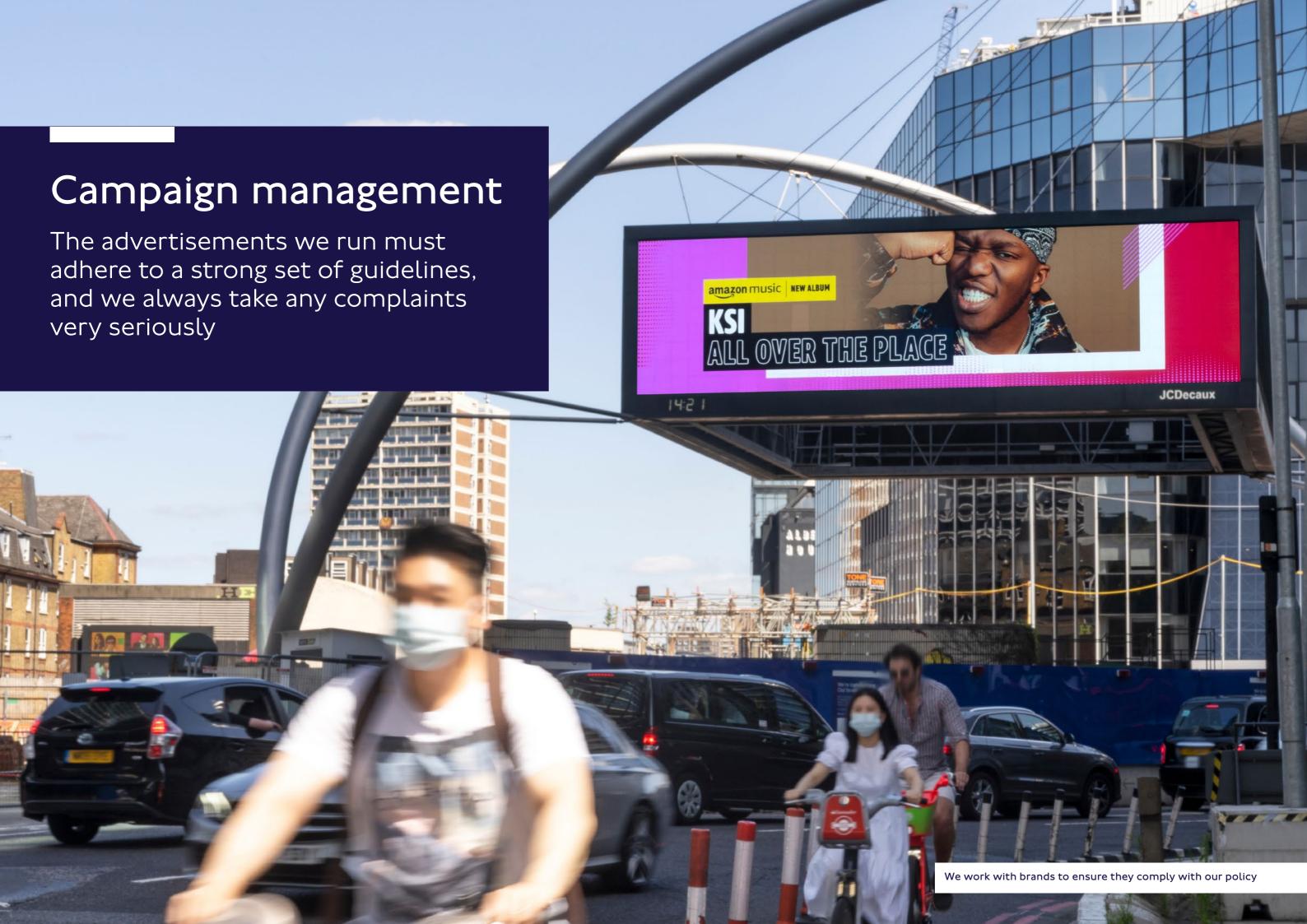
The restrictions do not 'ban' any specific brands or products from being advertised on our network. They do, however, restrict the direct promotion of food and non-alcoholic drinks high in fat, sugar or salt, as well as the indirect promotion or incidental use of those foods and non-alcoholic drinks in an advertisement.

In 2021/22, we rejected 20 advertisements, displaying foods and non-alcoholic drinks that were high in fat, sugar or salt. We also

rejected nine exceptions. We worked with advertisers to amend their copy so that alternative campaigns could still run across the network.

This year, the success of these restrictions was highlighted in new research from The London School of Hygiene & Tropical Medicine, which used data from two million grocery purchases of products high in fat, sugar or salt to examine the effect of the policy. The research showed that households were buying on average I,000 fewer calories per week from products high in fat, sugar or salt, which is equivalent to the average Londoner buying one and half fewer chocolate bars – or 385 less calories – per week.

More information on the restrictions, including the report, can be found on the Greater London Authority website.





Advertising categories

A breakdown of advertising run by market sectors

Category	Number of advertisements
Government, social and political	1,924
Entertainment and leisure	1,907
Business and industrial	1,204
Retail	1,201
Finance	674
Property	517
Media and publishing	496
Travel and transport*	439
Mail order	397
Drink	343
Clothing and accessories	259
Pharmaceutical	238
Cosmetics and personal care	210
Not allocated	207
Food	197
Office and home computing	174
Online retail	152

Category	Number of advertisements
Telecommunications	95
Education and vocational	94
Leisure equipment	79
Household equipment and DIY	78
Games and consoles	73
Internet	66
Charities	57
Luxury goods	49
Household fast-moving consumer goods	40
Medical	35
Recruitment classified	I5
Multi advertisers	13
Electronics, household appliances and technology	12
Gardening and agriculture	10
Tobacco and accessories	7
Total	11,262

^{*} Now includes motors as this is no longer recorded as a separate category by our media partner

Managing our campaigns

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

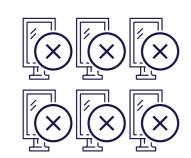
The complaints we receive directly cover a wide range of topics. A small number of specific advertisements tend to generate the majority of the complaints we receive. Overall, we receive a low number of complaints given the large number of campaigns and individual advertisements we run.



Five

advertisements were subject to ASA complaints (four complaints were upheld)

60 advertisements declined



complaints were received directly from our customers



Advertising campaigns that received complaints in 2021/22

Advertisement	Number of complaints
Channel 4: Naked Attraction	31
Not known	23
TIER	14
Floki Inu	10
Oncologia	9
Pedal Me	9
Elanco	8
Boohoo	5
Bitcoin	4
Covid-19 vaccine	4
The Sun	4
PrettyLittleThing	4
BoohooMAN	3
BAE Systems	3
Cambridge Mask	2
Mercedes	2

Advertisement	Number of complaints
Banksy	2
Solitaire Cash	2
Antlers	2
Arsenal	2
Green Planet	2
Coinfloor	2
Adidas	2
JJ Whitley	2
Compare the Market	2
Amazon Alexa	2
North Cyprus Holidays	2
PA for Euro 2020	1
Voltex	1
David Hockney roundels	1
Lungworm.co.uk	1
Jiffy	1

Advertisement	Number of complaints
Cryptocurrency	1
Randox	1
Halloween	1
Afrostar	1
National Art Pass	1
Lil Nas X	1
Royal Borough of Greenwich	1
Shen Yun	1
#endthepandemic	1
IO Pay	1
KFC	1
McDonald's	1
Venom	1
Total	175

All advertisements that run on our transport network must adhere to our Advertising Policy and comply with the ASA guidelines. We take any complaints we receive very seriously.

In 2021/22, we received I75 complaints about advertising. 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 run on our own advertising estate.

We continuously work together with brands to ensure that they amend their advertising to ensure it complies with our policy.

Complaints to the ASA

ASA Complaints Advertiser – 2021/22	Result of appeal
Emma mattress	Upheld
Floki	Upheld
Luno	Upheld
Alpro	Upheld
Columbia Pictures	Not upheld

Reasons for declined advertisements

TfL Advertising Policy clause	Frequency
2.3 (a) Likely to cause widespread offence or serious offence to reasonable members of the public	4
2.3 (b) Depicts adults or children in a sexual manner or displays nude or semi-nude figures in overtly sexual context	3
2.3 (c) Could reasonably be seen as distasteful, indecent or obscene	4
2.3 (d) Could reasonably be seen as likely to cause pressure to conform to an unrealistic or unhealthy body shape	3
2.3 (h) Contains images or messages which relate to matters of public controversy or sensitivity	3
2.3 (m) It may adversely affect in any way the interests of the site owner, TfL or any member of the GLA Group	1
2.3 (p) promotes food or non-alcoholic drink which is high in fat, salt and/or sugar ('HFSS' products)	20
2.3 (q) unacceptable for some other substantial reason (which TfL will identify and explain as reasonably required)	22
Total	60

Advertising Steering Group

To ensure our Advertising Policy remains relevant and up to date, the Advertising Steering Group discuss wider policy and industry issues, as well as how we can further engage with the industry and customers through advertising.

The group met on 22 March 2022, welcoming Seb Dance to his first meeting in his new role as Deputy Mayor for Transport. The group discussed complaints, current issues surrounding cryptocurrency advertising, the gambling advertising restrictions and the first report review findings of our policy to restrict the advertising of foods and non-alcoholic drinks that are high in fat, sugar or salt on our estate.

Minutes of the meeting on 22 March 2022 are published on our <u>Commercial Media page</u> on our website.

Membership group



Dr Mee Ling Ng TfL Board Member (Chair)



Seb Dance Deputy Mayor for Transport



Sarah Brown Mayoral Director, Communications



Professor Phillippa Diedrichs Professor of Psychology, University of the West of England



Tom Knox Chairman of MullenLowe and former President of the Institute of Practitioners in Advertising



Jeff Ingold Head of Media, Stonewall



Contact us

To send feedback or to complain about an advertisement, visit tfl.gov.uk

Call our 24-hour contact centre on 0343 222 I234

Or write to:

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

About Transport for London (TfL)

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 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 London Cable Car. The experience, reliability and accessibility of these services is fundamental to Londoners' quality of life.

We manage the city's red route strategic roads and, through collaboration with the London boroughs, we are helping to shape the character of all London's streets. These are the places where Londoners travel, work, shop and socialise. Making them places for people to walk, cycle and spend time will reduce car dependency, improve air quality, revitalise town centres, boost businesses and connect communities. As part of this, our expanded Ultra Low Emission Zone and fleets of increasingly environmentally friendly and zero-emission buses are helping to tackle London's toxic air.

During the pandemic, we took a huge range of measures to ensure people were safe while travelling. This included extensive cleaning regimes across the public transport network and working with London's boroughs to introduce the Streetspace for London programme, which provided wider pavements and cycle lanes for people to walk and cycle safely and maintain social distancing. London's recovery is vital to the UK's recovery as life returns to normal. We want to ensure London avoids a carled recovery and we continue to reassure people the capital and our transport network is safe and ready for them.

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

Working with the Government, we completed the Elizabeth line in time for Her Majesty the Queen's Jubilee. This transformational new railway adds 10 per cent to central London's rail capacity and supports the delivery of high-density, mixed-use developments, which are planned around active and sustainable travel to ensure London's growth is good 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 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 can create a better city as London's recovery from the pandemic continues.

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