



METRO STORIES

GLOBAL

Time and space for a
daily dialogue with urban lives





Time and space for a daily dialogue with urban lives

39M Passengers daily

32 Metro concessions

12 Countries

1/3 

Of global daily passengers



JCDecaux

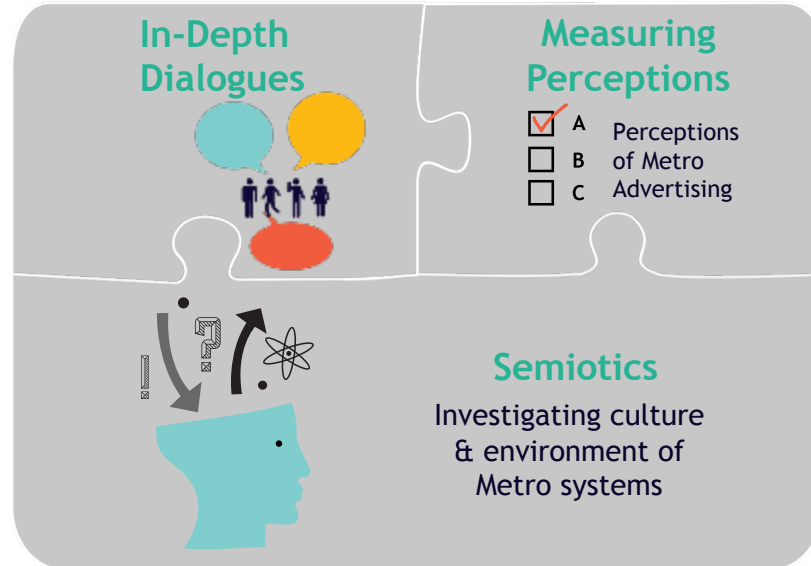


Metro Stories - Methodology

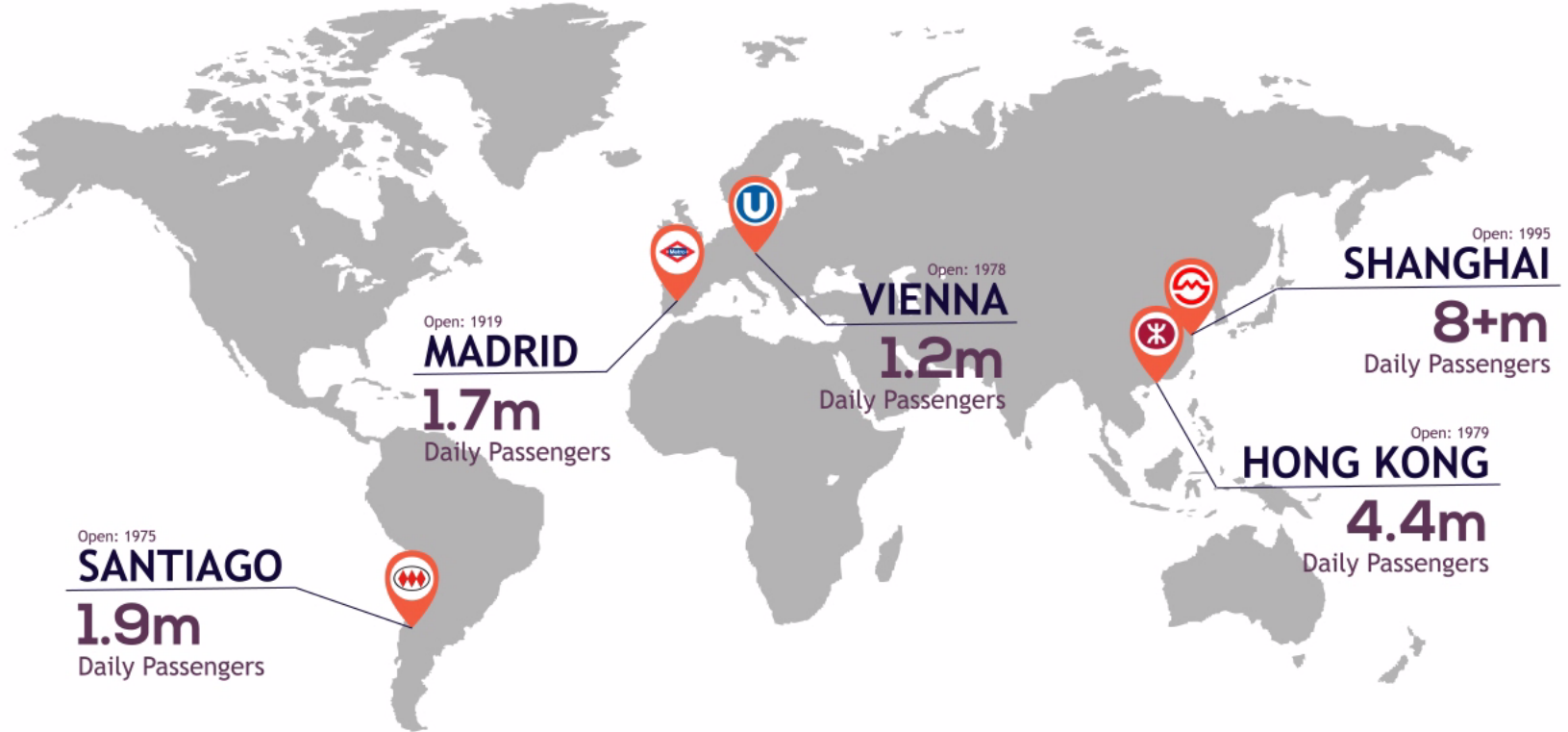
Modular Approach

**METRO
STORIES**
GLOBAL

Lawes Gadsby Semiotics



5 Global Metros For Global Application



First Global Metro Study

Demonstrate

Relevance and importance of
metro media in daily urban lives

Discover

Passenger perception of the metro environment

Develop

In-depth understanding of effective advertising
communication within a metro environment



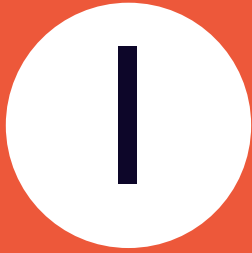
The Metro: an **efficient** mass transit system identified as a **vital asset** to the city

Passengers see **advertising** as an integral and **beneficial** addition to the metro environment

Metro journeys are frequent, habitual and long-term; together these create a **unique environment** for a brand's **daily dialogue** with urban dwellers



**Metro Stories
Map**



Metro: Essential to Daily Urban Lives



Metro Machine



People to Passengers



Efficiency

The over-riding aim of Metro systems is to move people through the system as **safely** and **efficiently** as possible

Captivity
&
Control

This process turns people into 'passengers' whose **behaviour** and options are limited and controlled by the 'machine-like' metro organism

Arousal

A state of physical & mental alertness that is heavily influenced by the immediate environment

- Noise, bustle and enforced control of the Metro-machine creates an arousing environment, even for regular passengers

“During the weekend, you are more calm, not in a hurry and you watch what is going on around you. You are not occupied doing something as you are on weekdays.”
(Male, Madrid)



The Metro provides an essential service in the city



“The Metro is really important to our lives and work here in Shanghai.
The city would be paralysed if there was no Metro.”
(Male, Shanghai)



Metro may be viewed as a machine-like organism

Yet it is essential to connect people to the city

Metro environment influences levels of arousal
It is a dynamic and evolving place

-  Metro Environment
-  Audience
-  Advertising
-  Daily Dialogue



Metro Passenger: a Mass Audience Willing to Interact



Professional



61%

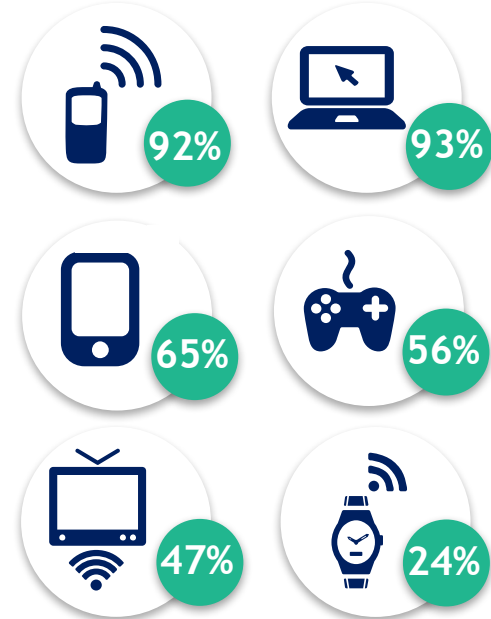
are in
Higher/ Intermediate
professions

Affluent



Average income
higher
than the average

Tech-rich



Metro journeys are frequent, regular, habitual & long-term



...metro passengers
make 7 to 10+
journeys in a typical
week

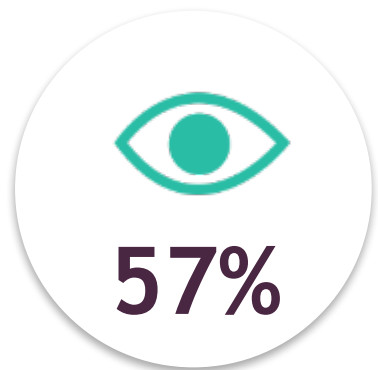


... are travelling for
20 to 40 min. on
average



... have been making
the same metro
journey for over a
year

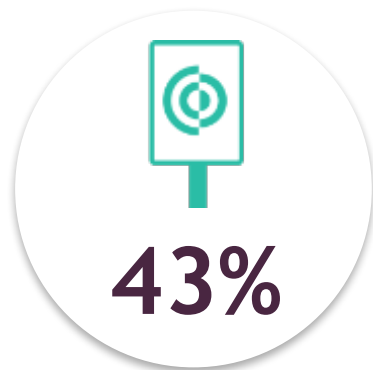
 Key activities undertaken per journey



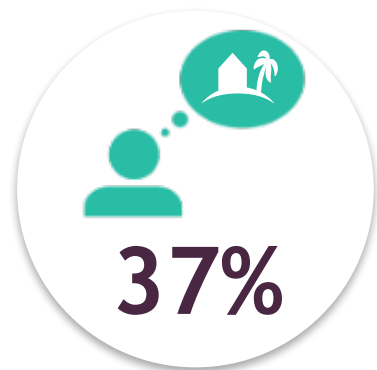
Take in the surroundings



Relax & do nothing



Look at advertising



Plan things I need to do

Passengers are productive during their necessary travelling time

37%

make plans while on the metro...

"I use the journey time for contemplation and thinking ahead."
(Male, Vienna)



Passengers are interested in receiving more information through direct interaction



Scanning
a bar code



Tapping/swiping
on a poster



Interacting directly
with a digital screen

A mass and valuable audience

Metro passengers are creatures of habit

They tend to be active during their journey

Metro passengers seek to convert travel time to useful time

- Metro Environment
- Audience
- Advertising
- Daily Dialogue

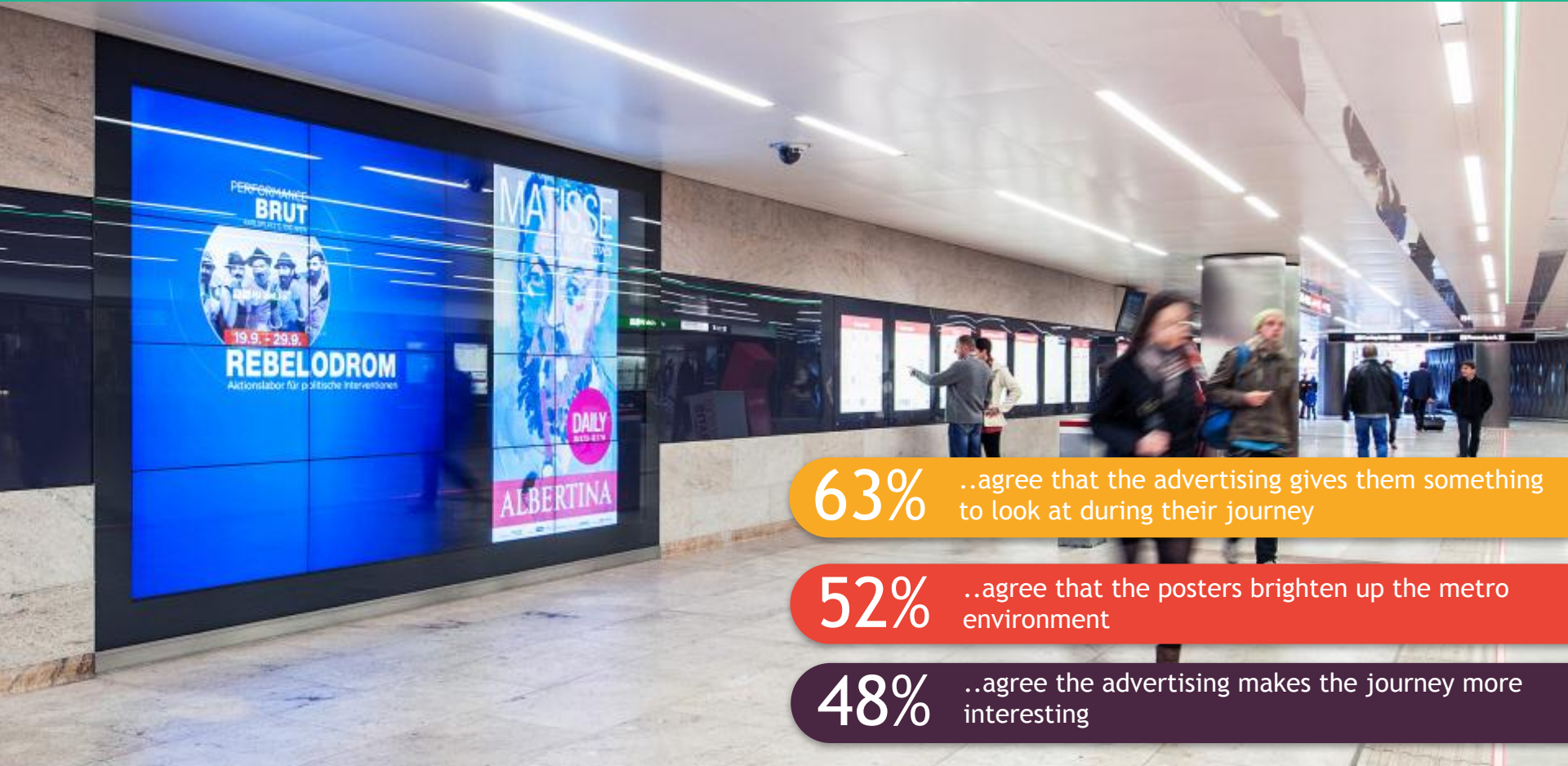


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Advertising: an Integral Feature in the Daily Commute





63%

..agree that the advertising gives them something to look at during their journey

52%

..agree that the posters brighten up the metro environment

48%

..agree the advertising makes the journey more interesting



..searched on the **Internet** for an advertised brand or product or visited the website



..talked **to friends, family or colleagues** about brands they had seen advertised



..looked for an advertised brand or product in the **shops**



High level of advertising awareness

Positive appreciation

Passengers are active and pre-disposed to interact

Brands advertising in the Metro become part of daily lives

Advertising is an integral part of the Metro experience

- Metro Environment
- Audience
- Advertising
- Daily Dialogue



IV

Advertising in Metro: Time & Space for A Daily Dialogue With Urban Lives





Each stage of the metro journey produces a different mindset that “smart” advertising can take advantage of



Autopilot



Bored



My time



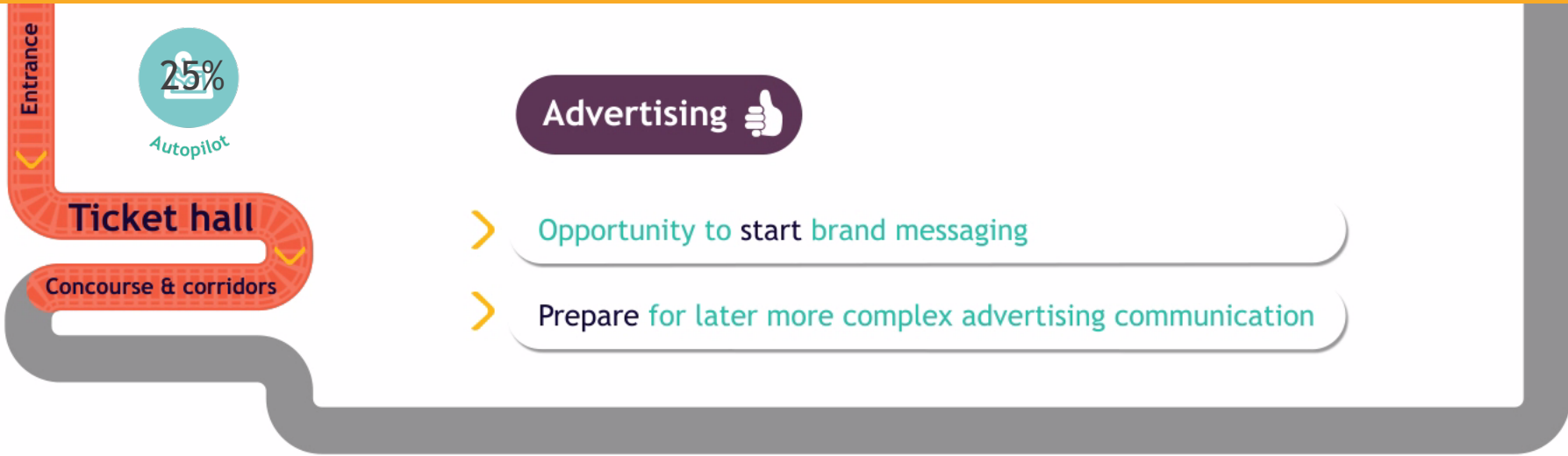
Relaxed

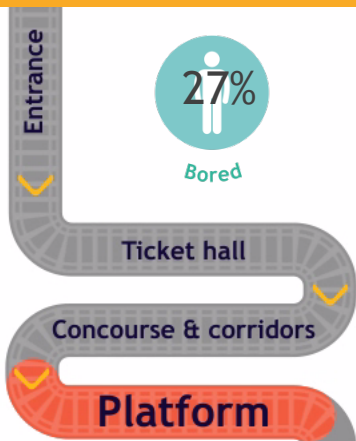


Relaxed



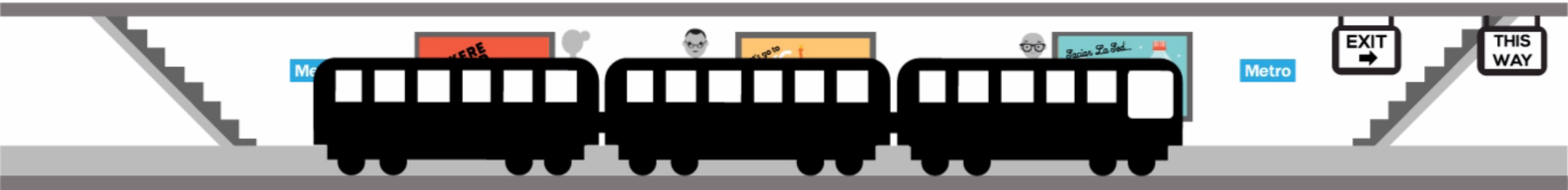
Autopilot





Advertising

- > Advertising on platform provides a visual escape and is seen as a welcomed distraction
- > Platform dwell-time offer a greater attention capacity - an opportunity for more complex ad messaging



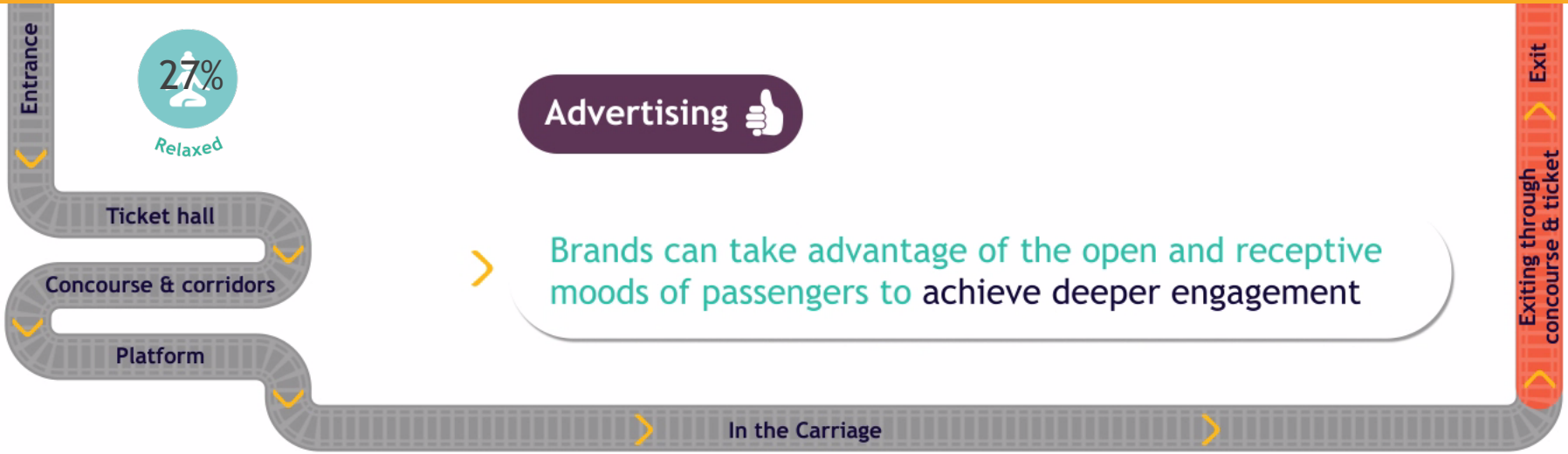


Advertising

- > Creative aligned with passengers’ thinking will likely resonate as this time is often used for planning
- > Time to develop engaging ad solutions (QR code, NFC, gaming...)
- > TV in trains are an efficient medium for advertising



At the End of the Journey, Moods are Receptive to Events Breaking the Routine



Stand out with high impact and enough creativity to engage their attention



Visuals - Original and entertaining

Communications - Clear messaging expressed in creative ways

Interrupt the routine - Surprise, interact, dominate

Utilize daily contact for storytelling

Tailor advertising to time of day / season / events

Utilize **panel placement** when creating digital motion

Through sponsorship

71%

agree think favourably about brands that provide useful free services

“The stations with free Wi-Fi from Nescafé as they have places where you can sit down and there is Wi-Fi for people who need it.”
 (Female, Santiago)







JCDecaux

2,153 completed online interviews



Average interview length: 30 minutes

Journey

At least 6* journeys per week

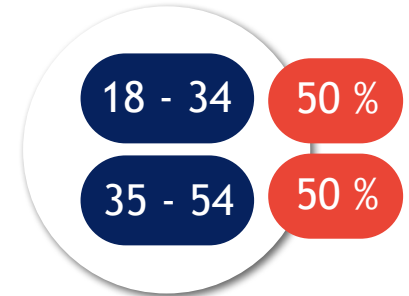
Status

Working / Retired / Studying**

Gender



Age



* : 4 journeys for Chile

** : % of students capped at 10% per market