Harnessing Intentional Attention

**MediaCom & Magnetic**

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**How the pandemic forced an unprecedented shift in mindsets and behaviours**

**A world turned upside down**

On March 23rd 2020, with Covid-19 infection rates rising and threatening to overwhelm the NHS, the UK went into national lockdown. It was as if a giant pause button had been pressed on much of the UK economy. Suddenly millions of people were stuck at home. Nearly half the workforce (47%)[[1]](#endnote-1)  was working from home, and all children apart from those of key workers, were to be home-schooled.

Suddenly many people had a lot more time on their hands than ever before, and very few opportunities available to them to spend it outside the home.

**The digital acceleration**

Much of our day-to-day activity moved online. The pandemic prompted a huge digital acceleration, precipitating the uptake of new technologies. Work moved to Teams and Zoom. Meetings with family and friends took place over WhatsApp video calls and FaceTime. Gaming penetration increased significantly. And our shopping moved from in-person to online. Data from GroupM shows a 24% increase in global online sales in 2020 – that’s a decade’s worth of e-commerce growth in just 12 months.

**The shift to more mindful pastimes**

Alongside this digital acceleration, people also took the opportunity to slow things down. For many lockdown was a chance to spend time in a different way. To do things that they didn’t normally have time to do because they had been so busy with commuting and their day-to-day activities. To focus on mindful, absorbing and intentional activities.

Sales of jigsaws and boardgames increased as families looked to new ways to pass the time together. People spent more time reading - 1 in 3 adults said they read more during lockdown than they had previously [[2]](#endnote-2). A third of children read more during lockdown, and children’s enjoyment of reading increased - from a 15 year low of 47.8% pre-lockdown to 55.9% post-lockdown [[3]](#endnote-3).

We saw a huge interest in baking, following recipes, gardening, and home improvement. Gardening was listed as the second most popular activity during lockdown after watching TV, according to GlobalData research in May 2020. The Financial Times reported that within the first 100 days of lockdown, 15 million people had visited the RHS websites, compared with 20 million in the whole of 2019. And this interest in gardening looks set to remain – garden centre sales in June 2021 were 40% higher than in June 2019 [[4]](#endnote-4), and allotment waiting lists in some parts of the country have increased by more than 200% [[5]](#endnote-5), suggesting that the gardening boom will be sustained beyond the pandemic.

Now of course, this is partly down to the fact that people were spending more time at home and wanted to make their homes and gardens better. But there was something deeper going on. Many people relished having the opportunity to spend time doing activities for their own sake and being able to explore their passions. And for many these activities have provided a way to improve their wellbeing – particularly their mental wellbeing.

**A mental health crisis**

It’s important to recognise here that there has been no universal experience of the pandemic. Whilst millions found themselves stuck at home with more time – many people found themselves with less time than before. Key workers had to continue travelling to work, many having to work harder than ever. Societal inequalities have been exacerbated; ethnic minorities, the working class, young people, and women have been disproportionately impacted by the health and economic impacts of this crisis.

The UK was facing a mental health crisis before the pandemic, and extensive lockdowns have only made this worse. Forecasts by the Centre for Mental Health predict that 10 million people in the UK will need mental health support over the next 3-5 years as a direct result of the pandemic, with carers, health workers, and those who have suffered economic hardship amongst those most likely to be affected [[6]](#endnote-6).

The Edelman Trust Barometer Spring 2021 update found that 59% of UK adults think that the pandemic will have a lasting negative impact of increased mental health problems. This is the second highest concern after job losses [[7]](#endnote-7). Young people are particularly impacted. 26% of millennials and 22% of Gen Z in the UK have taken time off work due to stress and anxiety caused by the pandemic. And half of millennials and Gen Z in the UK report feeling anxious or stressed all, or most, of the time [[8]](#endnote-8).

**Mindful activities as a mental health antidote**

Against this backdrop of rising mental health challenges, many people have turned to more mindful and intentional activities as a way to help them manage their mental health. Nature England’s ‘People and Nature Survey’ reveals the extent to which people turned to the outdoors to make them feel better. Across the course of the pandemic 78% of people had taken a walk in a natural or green space in the preceding 14 days. 43% agreed that visiting local green and natural spaces has been even more important to their wellbeing, and 68% of people said that they made more time to notice and engage with everyday nature, such as noticing birdsong or butterflies. And this looks set to continue, with Google searches for “walks near me” higher than their pre-pandemic levels.

**From shifting behaviours to shifting mindsets**

Whilst many people couldn’t wait to see the back of lockdown (42%), a higher percentage of people (45%) felt there were some elements of lockdown that they would miss. Most of these elements relate to a quieter, slower pace of life - more time to spend with family, less traffic on the roads, more time at home, fewer crowds out and about. There were many positive behaviours that people thought they would continue post-lockdown – the most commonly cited amongst these are walking more, talking to family and to neighbours and shopping locally, according to The Policy Institute, Kings College and Ipsos [[9]](#endnote-9).

Underpinning these behavioural shifts, we have seen a change in attitudes and mindsets. For many, lockdown offered a chance to reflect, to reappraise what and who is important in their lives. Data from GroupM’s global Live Panel/Audience Origin study reveals the extent to which consumer priorities and values have changed. 59% of people said that what they thought was important has changed since the pandemic crisis, rising to 66% of those with young children.

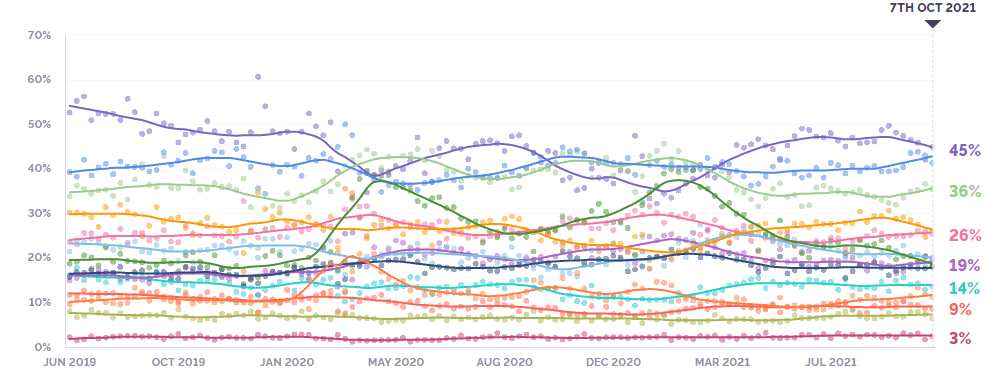
We are seeing this reappraisal most starkly in the employment market. A Microsoft report published in March 2021 found that 41% of the global workforce is likely to consider leaving their current employer in the next 12 months [[10]](#endnote-10). 46% of these people are planning to make a major career pivot or transition. This suggests that people are reappraising how they want to spend their time and what kind of work might bring more meaning and fulfilment to them.

Another attitude shift that we have seen is a greater interest in sustainability and conscious consumption. The pandemic has led many to adopt more sustainable behaviours. And this is a behaviour that looks set to continue. Karine Trinquetel from Kantar’s sustainable transformation unit has said "During past recessions, we have seen a decline in people placing sustainability as a priority. This time around the story looks different. People's views on sustainability have become reinforced… We are at a tipping point. All around the world, people are expressing an appetite for change." [[11]](#endnote-11)

**A lasting impact**

There is evidence that the collective experience of the pandemic will have a lasting impact on our brains. An article by Win Ee Chun and Dr Gemma Calvert on WARC entitled ‘Psychological stress or growth will determine post-pandemic consumer behaviour’ states that the pandemic has “resulted in a worldwide state of cognitive overload – the psychological phenomenon that occurs when the brain’s working memory system receives more information than it can comfortably handle.”

We can look at YouGov’s weekly mood tracker to see the impact of the crisis on our national psyche, revealing just how unsettling those early days of the pandemic and lockdown were. Normally more or less stable, our national mood went haywire. Levels of happiness decreased - we were more scared, sad, bored and frustrated than ever [[12]](#endnote-12).



Source: YouGov weekly mood tracker

Chun and Calvert argue that this collective experience is likely to have a lasting impact on our brains into the future. They suggest that people will be looking to familiar brands they can trust as they navigate the post-pandemic future.

So we are seeing evidence that people are emerging from the pandemic in a different mindset from when we so abruptly entered it. People are valuing time spent with loved ones more, they are reappraising when, where and how they work, and re-assessing their relationship with the natural world. This mindset shift has opened up opportunities for more intentional and purposeful moments in life and in media.

**Our changing media consumption**

Throughout lockdown, uptake of new channels and platforms accelerated, and new behaviours were adopted at pace. This coincided with people being able to spend more time consuming content in a more mindful and intentional way. Subscription services saw a huge boost with consumers at home looking to food recipe boxes, letterbox cocktail kits, their favourite magazine titles, movies and TV series.

**Bite-size entertainment thrived alongside longer-form content**

Online usage surged as people moved to working, schooling, socialising and entertaining themselves via their phones, tablets and laptops. Data from Vodafone reported a 40% increase in streaming and downloads since the start of the lockdown in March 2020 [[13]](#endnote-13).

TikTok is a stand-out example of success during lockdown. It was able to meet the desire for easy to consume (and create) bite-size snippets of content that provide levity and fun. And it allowed people to create and share their experiences of living through an unprecedented moment, with relatable and entertaining content. No surprise then that TikTok was the most downloaded app of 2020 according to App Annie, increasing fivefold from the previous year. Much of its success was driven by younger audiences. TikTok’s weekly reach amongst 16-24 year olds doubled during 2020’s lockdown from 14% to 30%, and rose to 43% in 2021 [[14]](#endnote-14).

Alongside this desire for short-form content and bite-size entertainment via channels such as TikTok, we also saw a move towards consumption of more long-form content. People had more time to immerse themselves in reading articles, viewing boxsets and movies – to consume media in a more focused and intentional way. According to data from Vodafone 64% of UK adults watched more boxsets in 2020 than they ever had before.

Subscription services such as Netflix and Disney+ saw increases in subscriber numbers and in time spent with their content. Weekly reach of subscription VOD services increased from 45% of UK adults in 2019 to 57% by the time of the 2021 lockdown, and average minutes viewed per day increased by a third, from 1 hour 11 minutes in 2019 to 1 hour 35 minutes in the 2021 lockdown. Enders has predicted that pandemic-related gains in SVOD viewing will remain and continue to increase [[15]](#endnote-15).

A recent report from Enders and the IPA highlights a difference in commercial media consumption – with younger audiences increasingly diverging from older audiences in their usage [[16]](#endnote-16). This is certainly true when we look at uptake of digital channels, with younger audiences much more likely to adopt newer methods and platforms. However, when we look at the types of media younger audiences are consuming, we see increases in a more intentional media consumption mode.

Podcasts are an illustration of this – reach and time spent listening rose particularly amongst 16-34s from 2019 to 2021, even as time spent with other media increased, demonstrating that this audience is fulfilling different modes of consumption with different channels – social media for more bite-size content and SVOD or podcasts for more immersive and intentional media experiences. Podcasts are stealing listening share from music streaming as people seek out audio content that aligns with their interests and informs as well as entertains. We can also see this more intentional mode of consumption in the rise of gaming throughout the pandemic. Gaming penetration increased significantly across all demographics in 2020 / 2021 [[17]](#endnote-17). And Google search data reported by Enders shows that interest in gaming remains elevated above pre-pandemic levels [[18]](#endnote-18).

**Magazines tap into the intentional media consumption moment**

Magazine brands have been able to tap into this intentional media consumption moment for a number of reasons.

Firstly people had more time to spend consuming content. We saw evidence of this as some titles saw subscriptions increase significantly during the pandemic, across both digital and printed formats. Dennis Publishing saw an increase of 9% in new subscribers versus the previous year, Condé Nast reported a 420% increase in new subscriptions and Bauer revealed big increases in subscription rates across some titles [[19]](#endnote-19).

People were also able to devote this extra time to their hobbies, interests and passions. When we look at circulation figures, the categories that showed the largest increases year on year related to the most popular lockdown activities – particularly cooking, gardening and outdoor pursuits.

BBC Gardeners World Magazine saw a 36% year on year increase in circulation, Garden Answers 38% and Garden News 17%. Olive Magazine and BBC Good Food saw circulation increases of 24% and 23% respectively. And perhaps reflective of our renewed interest in the outdoors and the natural world, National Geographic saw a year on year increase in circulation of 5% [[20]](#endnote-20) and Country Walking had a 13.7% rise in subscriptions year on year (ABC Feb 2021).

Touchpoints data also reveals that amongst magazine readers overall time spent with magazines increased over the lockdown periods. Time spent reading magazines was 16% higher during 2020’s lockdown - up from 24 minutes a day in 2019 to 28 minutes a day in 2020’s lockdown. And whilst time spent reading did drop off in between the 2020 and 2021 lockdowns, it remained higher than the 2019 level at 25 minutes a day and returned to 28 minutes a day in the 2021 lockdown.

And as people spent more time with magazines, trust in magazines grew.

During the pandemic, people were more likely to say they trusted more traditional forms of media. Local and regional news, newsbrands and magazine titles all saw levels of trust grow as people sought the reassurance of familiar brands and reputable editorial content during the crisis. Magazines saw trust steadily increasing across the three waves of Touchpoints data in 2020 and 2021. By contrast, trust in social media remained low (the lowest of all media types) – increasing only slightly between the lockdowns but reverting to 2020 lockdown levels in 2021.

The steady increase in time spent with magazines across printed and digital formats, growing levels of trust in the medium, and the type of magazine content that has performed particularly well over the last 12-18 months suggests that they have been successful at tapping into this more intentional media consumption moment. This is because magazines provide people with a targeted and immersive experience around their interests. Magazines are also well-placed to align with our pandemic and post-pandemic mindset, evolving to use their unique voice to create campaigns with purpose that reflect the reality of living in the time of coronavirus.

A great example of this is Hearst’s Project Body Love. Launched in 2019 with P&G, the multi-brand, multi-channel partnership sought to promote body positivity amongst women. The second phase of the campaign, which launched in partnership with Philips in December 2020, looks to continue to support a positive self-image after research revealed that only 10% of women felt more confident about their body during lockdown.

Similarly, Bauer pivoted their cross-channel “Where’s your head at?” campaign to address the mental health challenges caused by the pressures of the pandemic and lockdown living.

Magazines present unique multi-platform opportunities for advertisers to align themselves with a trusted editorial voice on subjects that really matter to people, and that have become even more important as we navigated through this crisis. They allow brands to tap into the growing interest in conscious consumption, by aligning to campaigns that have positive societal impact. And they provide an environment that captures intentional attention, something that is hugely valuable to advertisers.

**Intentional media attention**

The increase in time spent with media and the more focused attention delivered by certain types of media experiences represents good news for advertisers. But it is important to tap into this intentional media consumption sensitively and in ways that will positively capitalise on attention.

Magazines are well placed to do this because of the intentional way people tend to consume the content, and because of the quality of advertising attention they deliver as a result. Work from Lumen has identified some of the factors that can drive higher advertising attention. When it comes to harnessing this intentional attention, the most pertinent of these are:

* ‘slower’ content
* personally relevant advertising
* non-interruptive experience

**‘Slower’ content**

*“A fast approach tends to be a superficial one, but when you slow down you begin to engage more deeply with whatever it is you’re doing”*

­­­Carl Honoré, award-winning writer, broadcaster and TED speaker.

In our world of accelerated culture, we tend to lionise the fast, but when it comes to advertising, faster doesn’t necessarily mean better.

Research has shown that the more attention paid to the content, the more attention is paid to the advertising. A project by the ARF on context, found strong evidence that more attention to and involvement with the content, platform, device and media brand is likely to improve advertising performance [[21]](#endnote-21). And a strong indicator of involvement, in the online environment at least, is scroll time.

Lumen’s ‘Putting Attention into Context’ study has demonstrated that advertising on sites where people consume content more intently and spend more time with the content gets more attention. This is because people who spend more time with the content, also have more opportunity to notice and pay attention to the advertising there [[22]](#endnote-22).

Lumen’s research found that the slower the scroll speed on the site, the greater the attention time the advertising received. This was particularly the case on mobile sites where scrolling speeds can often be very fast. The research also found that people were more likely to spend longer with content on magazine websites, scrolling through the pages more slowly and consuming the content more intently.

In this study, magazine sites received the highest level of attentive seconds to advertising. Conversely, scrolling tended to be faster within social media feeds, with people scrolling through the content more quickly looking for something that might interest them. This means that digital magazine formats received more attention than either social media or quality digital display, across both desktop and mobile.

We’ve already seen that magazine brands provide trusted online environments where people actively seek out content that is aligned with their passions and interests. This ‘top down’ attention is usually slower and more effortful, intentional, and focused. This is particularly true of printed magazines.

Magnetic’s ‘Attention Please’ study shows that magazines are more likely than other media (with the exception of newspapers and cinema) to be consumed with solo focus, ie people are less distracted and weren’t doing anything else whilst reading them [[23]](#endnote-23). This suggests that people are more involved with the content. Indeed, Touchpoints data backs up this point, showing that people are spending more than twice as long reading printed magazines in comparison with magazines online.

**Personally relevant advertising**

Numerous studies have demonstrated the importance of relevance in driving attention. Once such example is Magnetic’s ‘Home Truths’ study which found that home interest advertising placed alongside relevant editorial gained a higher share of advertising attention versus advertising placed in non-relevant contexts [[24]](#endnote-24).

This intuitively makes sense – people reading the editorial are already engaged in the subject matter and the advertising is tapping into this interest. It is also ensuring greater congruence between the subject matter of the advertising and the editorial meaning that there is less cognitive effort required when consuming the advertising.

This is borne out by a research study by IAS which found that 81% of consumers like to see advertising that matches the content they are viewing, and 72% of consumers believe it is important that advertising is relevant to the context being consumed [[25]](#endnote-25).

And it’s not just contextual relevance that matters. Personally relevant advertising is more likely to be noticed. Research by the IAB found that personally relevant ads increased attention scores by 107%. They are more likely to be noticed, and noticed for longer. They are also six times more likely to be remembered [[26]](#endnote-26).

**A non-interruptive experience**

*“What information consumes is rather obvious: it consumes the attention of its recipients. Hence a wealth of information creates a poverty of attention”.*

Herb Simon, American economist

The American Psychological Association defines attention as “a state in which cognitive resources are focused on certain aspects of the environment rather than on others”. Attention is a finite resource, and in a world where there is seemingly endless information, attention is a scarcity.

Whilst the amount of information that we have access to has grown exponentially and the channels that we can access it through continue to proliferate, our brains’ ability to process that information hasn’t changed from the time that we were hunter gatherers.

Estimates put the number of advertising messages that people are exposed to at somewhere between 4,000 and 10,000 ads per day. It’s no surprise then, that more than 1 in 2 people (52%) say they feel bombarded by advertising [[27]](#endnote-27) [[28]](#endnote-28).

The proliferation of advertising has been growing as a matter of concern for advertisers in recent times, with The Advertising Association highlighting the issue in its ‘[Improving The Public’s Advertising Experience](https://www.isba.org.uk/media/2297/304_aa_isba_trustreport_a4_sp_aw-4-1.pdf)’ paper released in February 2020. Previous research by Credos had demonstrated the extent to which public trust in advertising was undermined by bombardment and intrusive advertising, stemming from four key issues – volume, repetition, obtrusiveness, and irrelevance [[29]](#endnote-29).

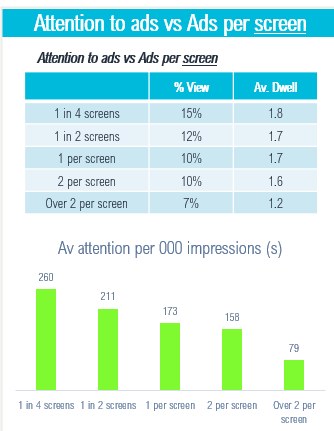
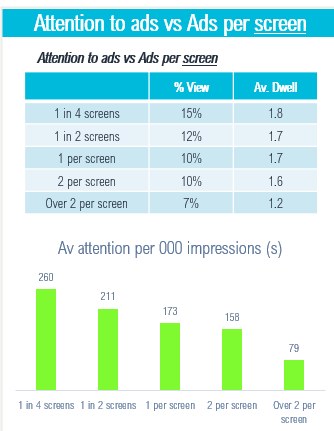
We pay a cognitive and psychological price for divided attention and interruption. It results in cognitive overload and can increase stress and anxiety. And right now, all this is happening at a time when we are already likely to be suffering because of the nature of the pandemic-related experience we have all lived through, as outlined earlier in this paper [Source: Chun & Calvert].

There are several studies that point to the negative impact of interruption on our ability to focus and concentrate. A study on interruption of workers by Gloria Mark at the University of California found that after being interrupted from a task, it took workers on average more than 23 minutes to get back on track with their task. This cognitive overload can cause feelings of stress and anxiety [[30]](#endnote-30). And this has implications for advertising receptivity and effectiveness – with interruptive advertising adding to the already considerable cognitive burden that we are dealing with on a day-to-day basis.

Data from Dentsu, Lumen and TVision has shown the impact of interruptive vs non-interruptive advertising formats on effectiveness. Their research has found that forced advertising views versus views that are voluntary have markedly different results, with advertising that is voluntarily viewed performing consistently better for both prompted ad recall and choice uplift [[31]](#endnote-31).

Alongside interruptive advertiadverts

sing experiences, advertising clutter is another source of cognitive overload. Research from Lumen highlights the extent to which advertising clutter can impact attention, and therefore advertising effectiveness. In their ‘Putting Attention into Context’ research Lumen were able to demonstrate that as the number of ads on screen increases, average eyes-on dwell time and overall advertising attention per 1000 impressions decreases.



Source: Lumen, Putting Attention into Context

So how can advertisers ensure that their advertising isn’t contributing to the already overwhelming amount of information that is overloading our cognitive systems? One way of doing this ensuring that advertising is placed in non-interruptive environments and in environments where the advertising is both welcomed and not intrusive.

Magazines provide just such an environment, and magazine readers recognise and value this. Previous research from Magnetic has shown the extent to which magazine readers positively value the advertising that appears in magazine contexts.

Far from being interruptive, the advertising is seen as part and parcel of the magazine reading experience. In Magnetic’s 2019 report ‘Pay Attention’ 57% of respondents agreed that advertising in magazines was part of the experience – the highest level of agreement of any media. Cinema was a close second with 55%, with digital display, social media and commercial radio carrying the least agreement. And data in the same report showed that people viewed magazine advertising more positively than advertising in any other media [[32]](#endnote-32).

**Why does all this matter?**

Well, higher attention to advertising has been linked to positive advertising outcomes, including higher levels of advertising recall, purchase intent and incremental sales.

A meta-analysis of 50 case studies by the Attention Council consistently found a positive correlation between attention and advertising outcomes such as brand awareness, recall and sales uplift [[33]](#endnote-33). This suggests that advertising that is present in environments where people are absorbed in the content and consuming it more intentionally and mindfully can be more effective than advertising in environments where the consumption mode is less mindful.

**In conclusion**

We have lived through a time of great societal and cultural upheaval which will leave its mark on the world for many years to come. Many of us have experienced stress, anxiety and trauma. And yet many people have had an opportunity to re-evaluate what is important in their lives and reappraise how they spend their time – seeking out a greater connection to others and to the natural world, and making time for passions, hobbies and fulfilment.

Changes in our media consumption have reflected this shift – we have seen accelerated take up of digital channels accompanied by more time spent intentionally with slower, more immersive content. Some of this behaviour is set to stay as we emerge into the new normal.

Magazine media offers a unique opportunity for brands to harness this focused media consumption moment. Magazine content aligns to people’s passions and interests and is able to tap into some of the more intentional trends we have seen around food, gardening, home interest, and health and wellbeing. Magazines deliver contextual and personal relevance, a ‘slower’ content experience, and an environment that is non-interruptive, allowing advertisers to capitalise on the benefits of intentional attention.

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