

# THE RISE OF ATTENTION

How physical retail environments capture attention – and why this matters for brands and retailers

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# INTRODUCTION

SOL DE JANEIRO

SEPHORA

Iconje



**Candice  
Mayer-Gillet**

MANAGING DIRECTOR, WESTFIELD RISE EUROPE

## **ATTENTION IS SHIFTING. AND IT'S MOVING TO PHYSICAL RETAIL ENVIRONMENTS.**

The average human attention span has fallen by a third since 2008 – now just 8 seconds long. At the same time, 81% of Gen Z and 78% of millennials wish they could disconnect from digital devices more easily. As digital fatigue grows, physical spaces are capturing the attention of engaged shoppers. Consumers still seek real-life experiences and, even in a digital first world, live experiences and experiential retail are capturing imagination. **Physical experiences drive attention in ways digital channels cannot replicate.**

Attention has become a real form of currency, and, in physical environments, it is earned through meaning rather than noise. I'm thrilled to introduce our latest research, The Rise of Attention, developed in partnership with Lumen. We explore how people engage with advertising across environments – and why physical spaces are increasingly where attention lands.

The findings are clear that our inventory can deliver deeper, longer-lasting attention. With average attention scores putting experiential at Westfield in the same bracket as cinema at the top of the attention funnel, it is clear to see how shopping destinations remain key cultural spaces where people discover, connect, and are entertained.

**CAMPAIGNS WILL ONLY SUCCEED IF THEY EARN ATTENTION WITH PURPOSE. AT WESTFIELD RISE, WE FUSE INSIGHT-DRIVEN STRATEGY WITH MEASURABLE IMPACT AND DYNAMIC PHYSICAL SPACES TO CREATE EXPERIENCES THAT STAY WITH VISITORS. WHEN BRANDS PRIORITISE MEANINGFUL ENGAGEMENT, ATTENTION DOESN'T JUST SPARK INTEREST, IT BUILDS LASTING LOYALTY.**

# WHAT IS ATTENTION?

*“The degree to which those exposed to the advertising are focused on it—ranging from a very brief exposure (or “scan”) that is likely to leave very little memory trace, to intense focus with cognitive and emotional engagement that can lead to enduring recall and impact attitudes and behaviour—both positively and negatively.”*

-The Advertising Research Foundation

# HOW WE DRIVE VALUE AT WESTFIELD RISE

## AWARENESS



**DYNAMIC MEDIA**

## ENGAGEMENT



**IMMERSIVE EXPERIENTIAL**

## REACH



**CO-MARKETING EVENTS**

## CONVERSION



**RETAIL POP-UP IN A UNIT**

→ **Powered by data**

# A WINNING FORMULA FOR BRANDS



**SCALE**



**SHOPPERS**

EMOTIONAL ENGAGEMENT  
DWELL  
CONVERSION



**ASSETS**

QUALITY AND PERFORMANCE

**POWERED BY DATA**

# ATTENTION IN PHYSICAL RETAIL SPACES

Westfield Rise is Unibail-Rodamco-Westfield's in-house retail media agency, activating campaigns across the best malls, cities, and audiences in the world. We combine powerful data insights with bold creativity to lead the evolution of retail media. From intelligent media networks to immersive brand experiences, we deliver omnichannel campaigns that resonate with intent-driven shoppers and outperform the competition.

With attention being top of mind for so many of the brands, retailers and advertisers we work with, Westfield Rise partnered with LUMEN to conduct a report that investigated the effectiveness of the Westfield mall environment.

Does the mall environment drive engagement that translates to brand outcomes?

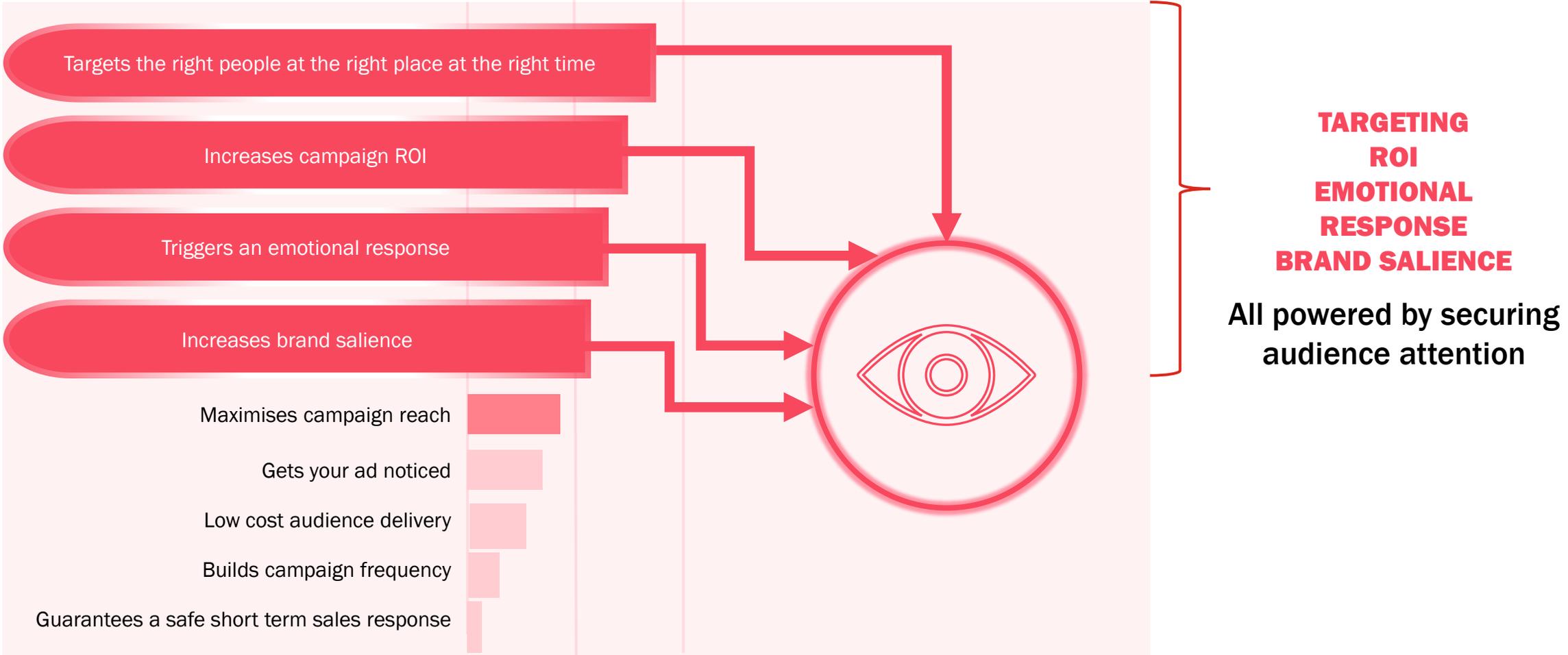
How does our inventory compare against alternative channels available to planners?

Discover the results in the paper now.



# ATTENTION: THE CORE DRIVER FOR EFFECTIVENESS

## RANKING OF DESIRED MEDIA ATTRIBUTES FROM MARKETEERS



# METHODOLOGY

miu miu



Miutine

THE NEW FRAGRANCE

miu miu

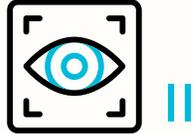
des...  
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# A RIGOROUS AND IMPARTIAL STUDY METHODOLOGY



I  
15-minute online survey  
with 1,600 respondents  
from the UK, aged 18+.



II  
Respondents viewed a 5-minute  
first-person POV video of  
Westfield malls before being  
asking to switch to their  
smartphone devices and browser  
a Facebook feed.



III  
Respondents completed a  
follow-up survey on  
memory, choice, and  
perceptions.



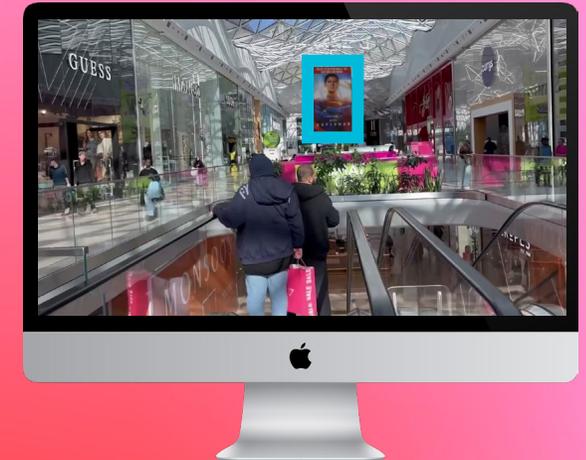
IV  
LUMEN analysed all  
attention and brand  
effects

# LUMEN MEASURED WESTFIELD RISE'S INVENTORY IN **FOUR** **UNIQUE GROUPINGS**

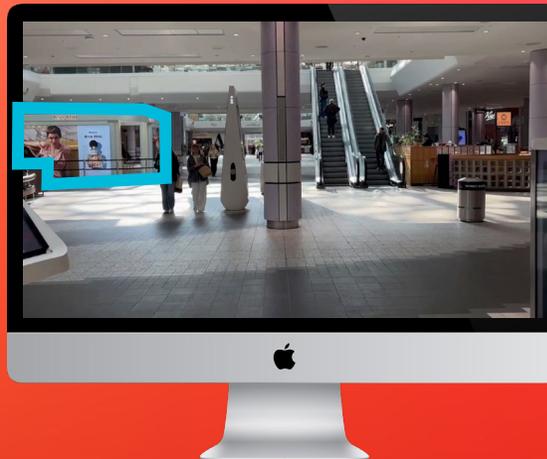
Digital Totems



Large format OOH\*



Experiential (non-engaged)



Experiential (engaged)



The ad shown in Banner was also shown as 1 of 3 ads in the Digital Totems format, meaning that results are shown as Digital Totems + Banner as it is not possible to isolate brand effects between this dual exposure

# THE FINDINGS



# KEY FINDINGS

## HIGHER ATTENTION LEADS TO STRONG OUTCOMES

# 1

### WESTFIELD RISE OOH MEDIA OUTPERFORMS BENCHMARKS<sup>1</sup>

**+36%** v.s average Roadside OOH  
**+17%** v.s average Internal OOH

# 2

### ON ATTENTION, WESTFIELD EXPERIENTIAL RULES<sup>2</sup>

**27x** more attention than a standard  
digital display ads (Attention per  
Mille)

Experiential delivers the highest levels of  
attention of any channel, rivalled only by  
cinema at the top of the attention funnel

# 3

### WESTFIELD INVENTORY HAS A STRONG PRIMING EFFECT

**+117%** Recall vs. standalone social  
campaign (unprimed)  
**+29%** Action intent vs. unprimed

Exposure to campaigns within Westfield  
significantly amplifies the performance of  
subsequent social media activity.

## LUMEN report attention data differently based on how it is traded.

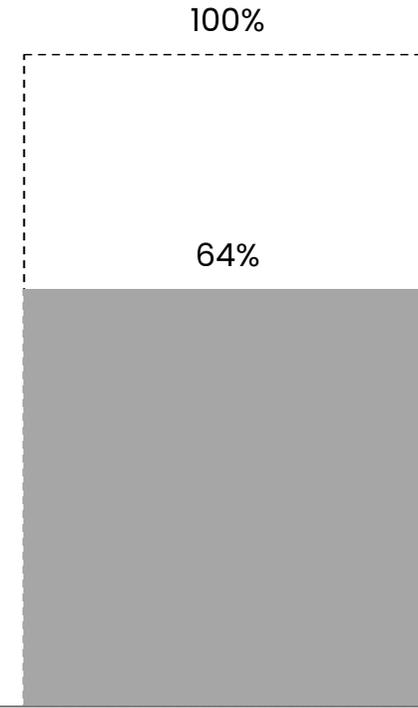
### Opportunity to Contact / See (OTC)

An opportunity to see/contact is a basic exposure metric that counts each time a person could have seen an ad, whether or not they actually noticed it.

**Visibility Adjusted Contact (VAC):** an ad impression that has been weighted by how likely it was to be seen. It takes into account placement, size, clutter, and viewability.

□ % viewed (VAC)

■ % viewed (OTC)



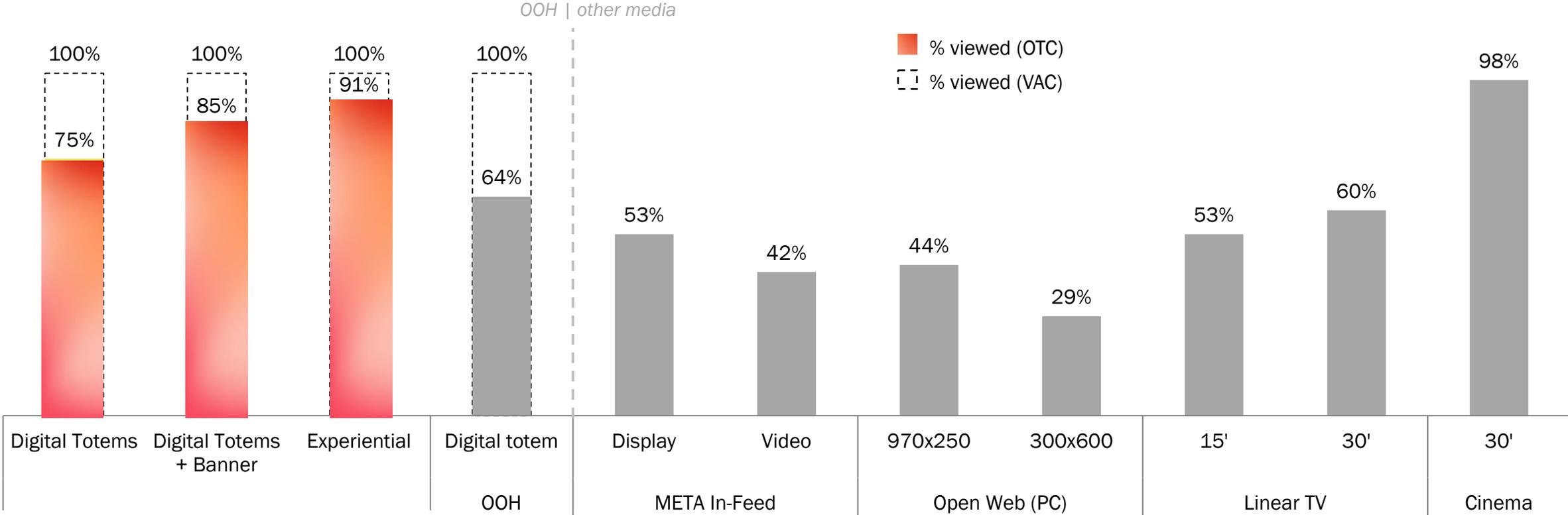
...if you were to buy 1,000 contacts based on **VAC**, all contacts would give attention to the OOH creative

...if you were to buy 1,000 contacts based on **OTC** then just 64% of the contacts would actually give attention to the OOH creative

LUMEN normative dataset

# UNRIVALLED VISIBILITY

FOR MARKETS TRADING VIA OTC, OUR INVENTORY IS LIKELY TO GET **NOTICED BY 75-100% OF PEOPLE**



**WESTFIELD RISE**

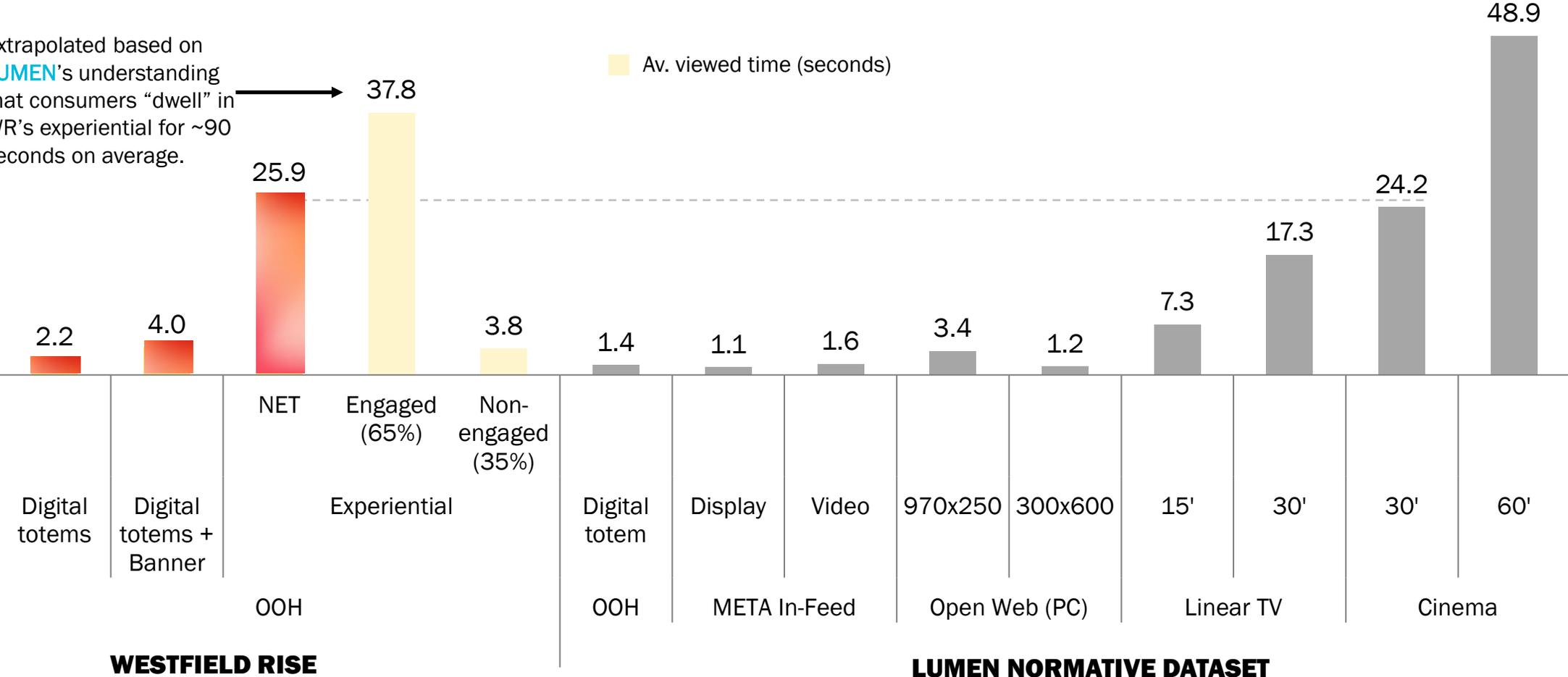
**LUMEN NORMATIVE DATASET**

# VIEW TIME: WESTFIELD INVENTORY OUTPERFORMS BENCHMARKS

EXPERIENTIAL GENERATES HIGH ATTENTION, ALIGNED WITH CINEMA 30'

Extrapolated based on LUMEN's understanding that consumers "dwell" in WR's experiential for ~90 seconds on average.

Av. viewed time (seconds)



WESTFIELD RISE

LUMEN NORMATIVE DATASET

# WESTFIELD RISE OOH SIGNIFICANTLY OUTPERFORMS OOH BENCHMARKS

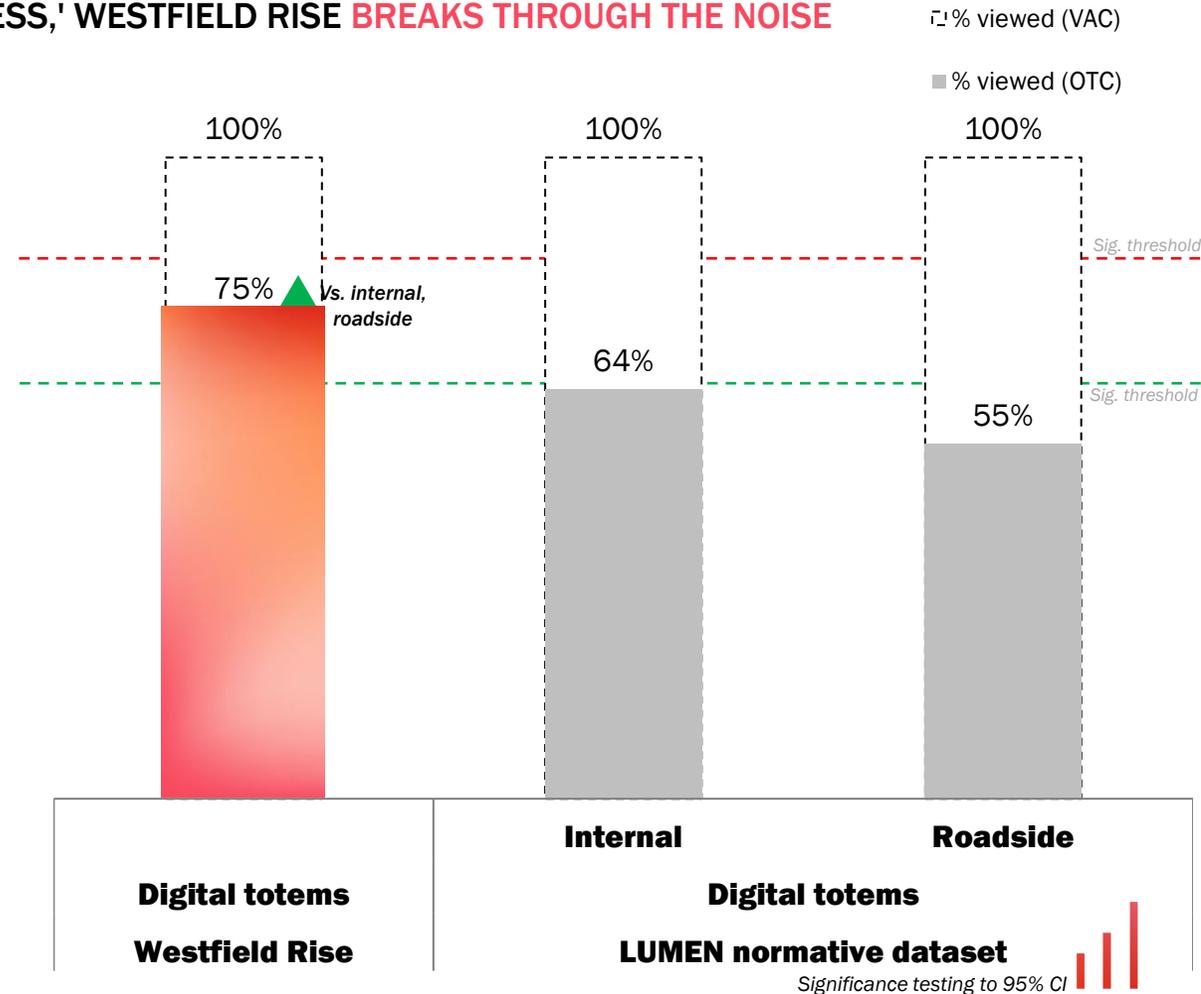
WHILE STANDARD DIGITAL TOTEMS OFTEN STRUGGLE WITH 'BANNER BLINDNESS,' WESTFIELD RISE BREAKS THROUGH THE NOISE

WESTFIELD OOH OUTPERFORMS NORMATIVE DATASET

**+36%**  
vs. Roadside OOH

**+17%**  
vs. Internal OOH

(Internal norm covers mall, airports, metros and any form of internal inventory)



# UNDERSTANDING APM

## ATTENTION PER MILLE (APM)

This composite metric helps us understand the true power of advertising to deliver 'eyeballs' for advertisers and can be used as a single metric to assess inventory quality across media platforms.

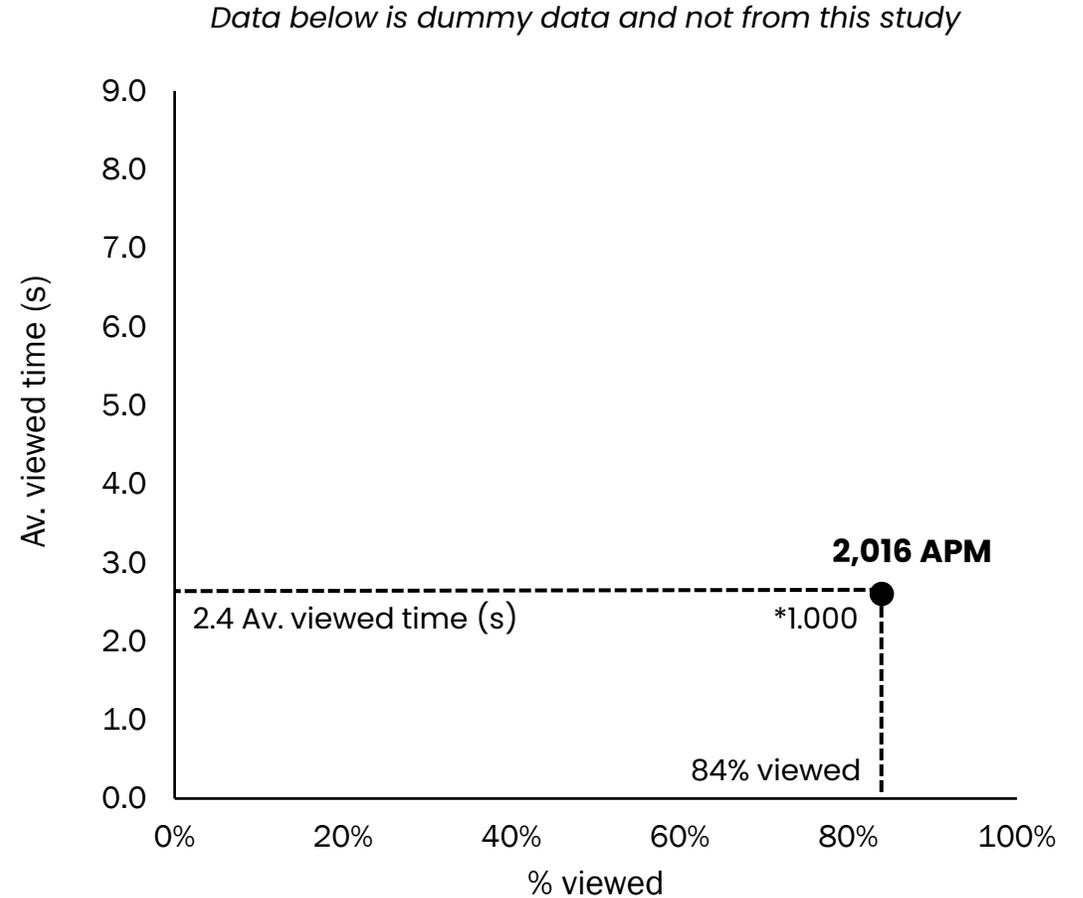
### Calculation

% viewed X

Av. viewed time X

1000 impressions / contacts =

Attention per mille (APM)



# ON ATTENTION, WESTFIELD INVENTORY RULES

Offering a range of attention which advertisers can utilise for different purposes. Full funnel impact to capture broad attention through to driving consideration close to the point of purchase.

## Westfield Rise **Experiential**

**27x** more attention than a standard digital display ads (Attention per Mille)

**3.6x** More attention than Linear TV

## Westfield Rise **OOH**

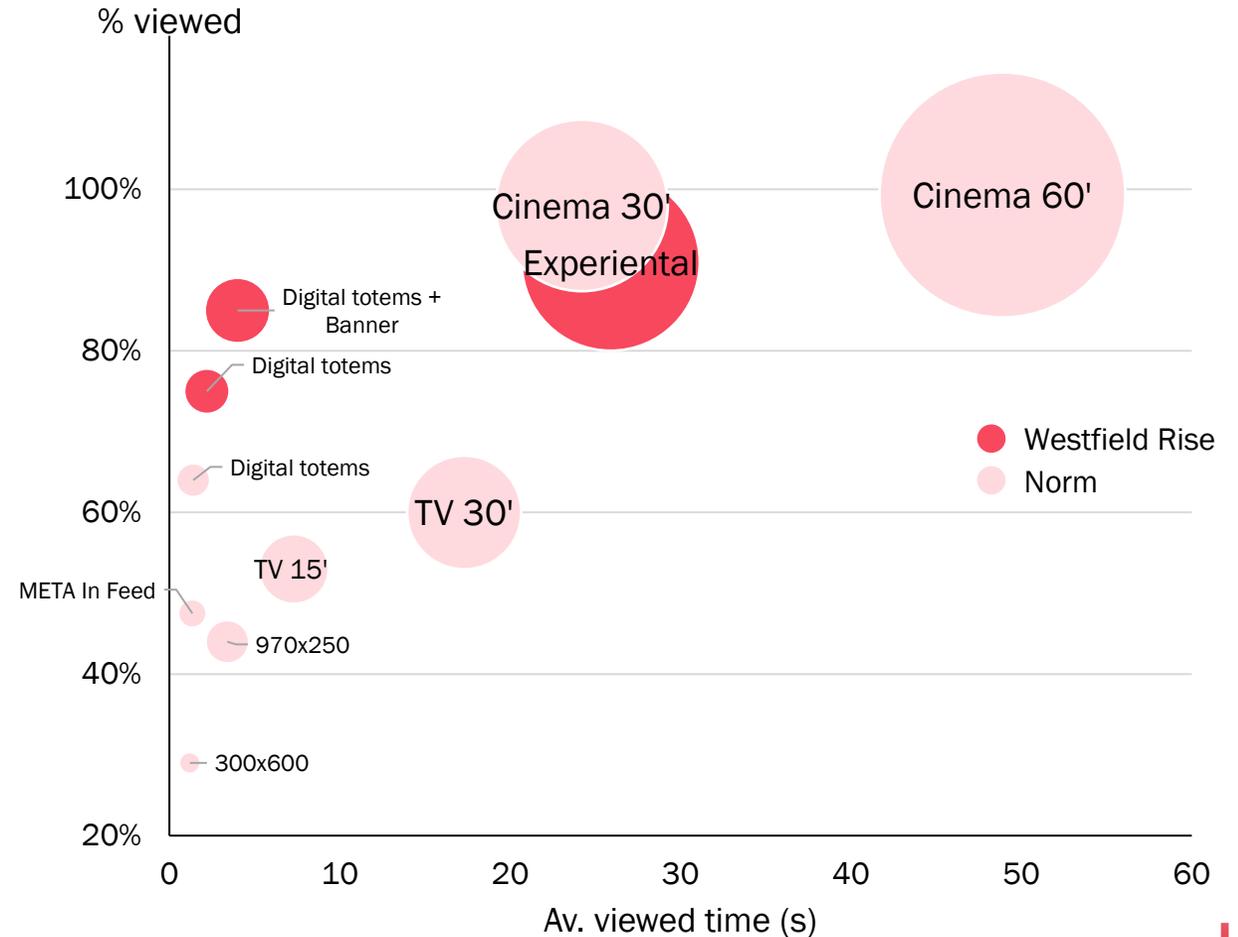
**1.5x** Vs. OOH Digital totem norm

**+85%** Adding large format to Digital Totems nearly doubles your attention

### Attention per mille

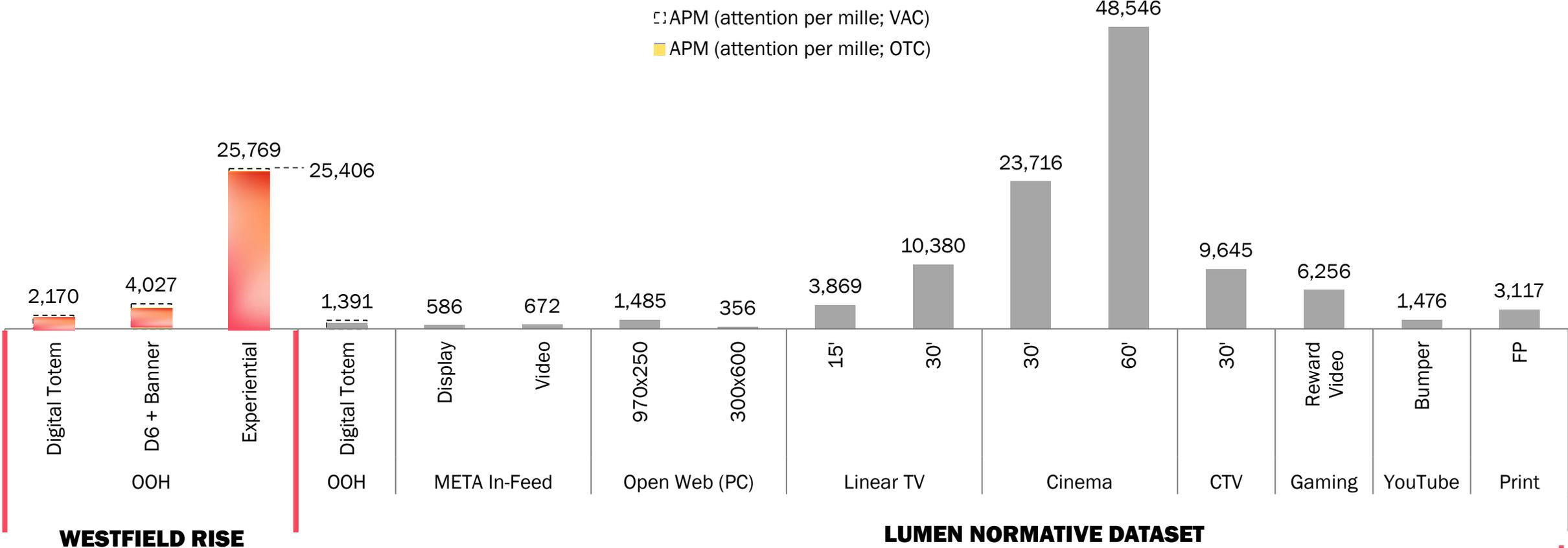
% viewed \* Av. viewed time \* 1,000 impressions

Bubble size represents APM



LUMEN Research 2026

# WESTFIELD RISE APM: OUTPERFORMING ALL BUT CINEMA 60'





# THE IMPACT OF ATTENTION

PRADA  
PARADIGME  
DER NEUE NACHFOLGER DER DUTTY



PRADA

PRADA

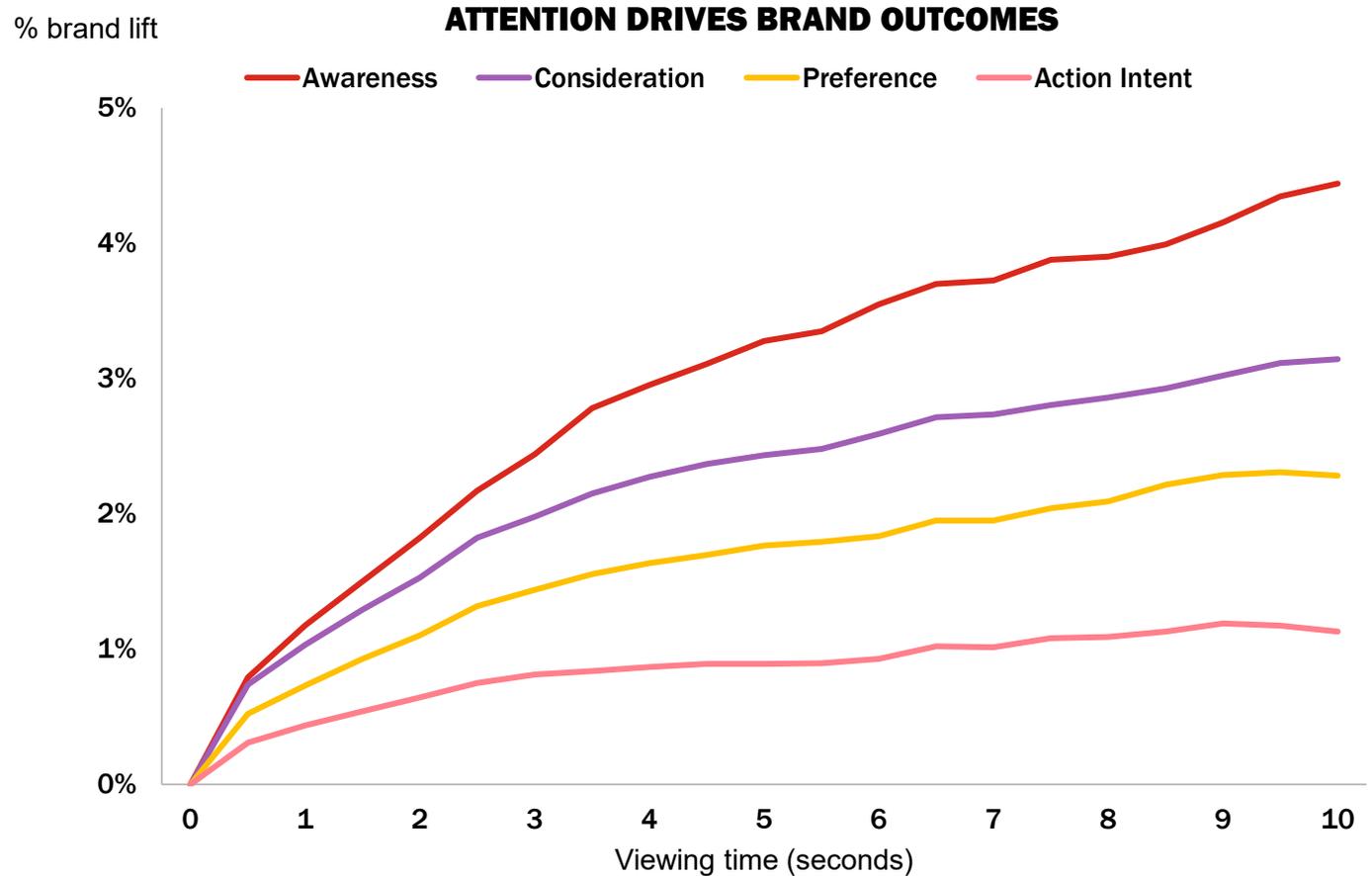
PRADA  
PARADIGME  
DER NEUE NACHFOLGER DER DUTTY



vodafone

50% SALE

# THE LINK BETWEEN ATTENTION AND BRAND OUTCOMES



# IMPACT FOR ADVERTISERS

# 1

Attention to Westfield inventory is driving lifts in **BRAND EFFECTS**

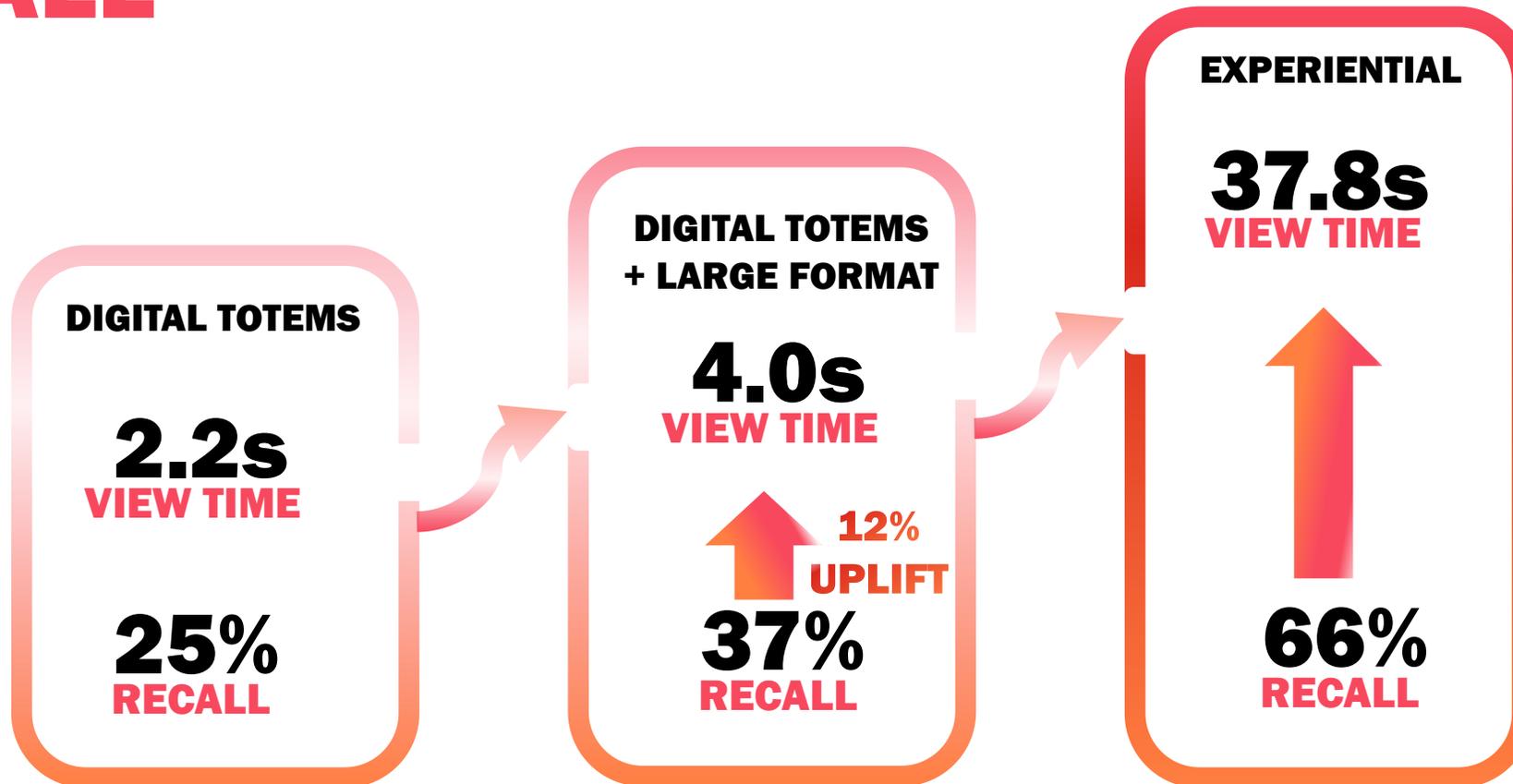
# 2

Brand effects of **RECALL AND CHOICE** are higher for ads shown on WR screens that other OOH media.

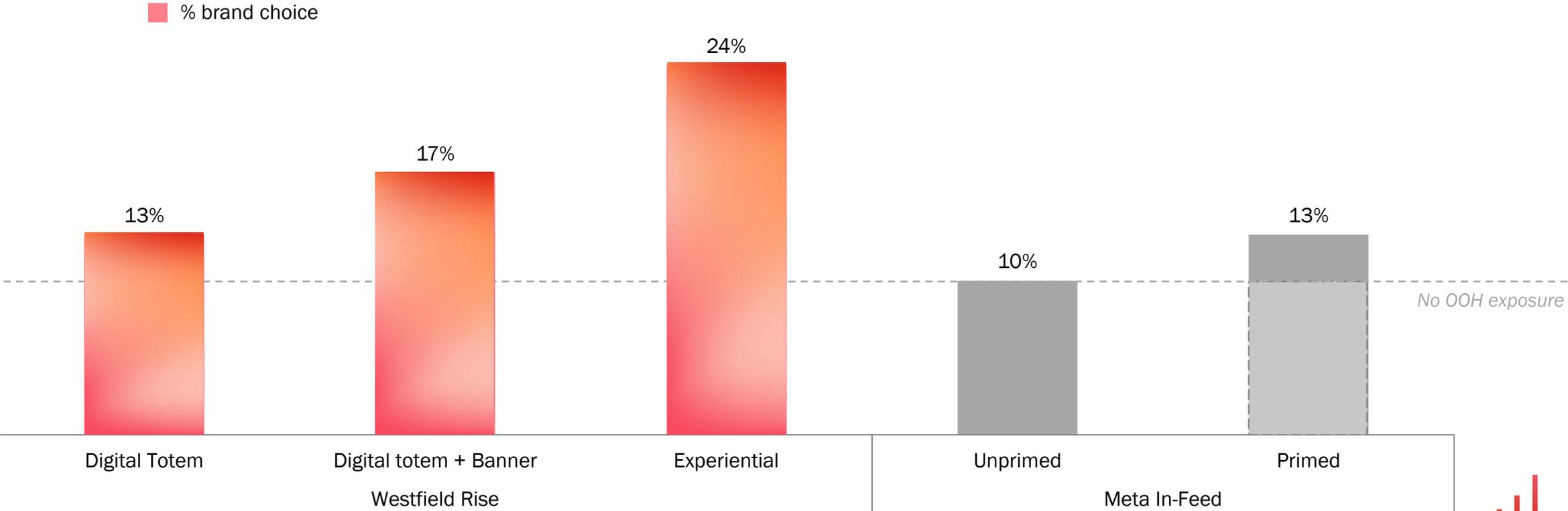
# 3

Attention to Westfield's inventory can be used as a **PRIMING ENVIRONMENT** to amplify the effectiveness of social media campaigns

# WESTFIELD'S ATTENTION-TO-MEMORY LINK: LONGER VIEWS DRIVE HIGHER RECALL



# WESTFIELD EXPERIENTIAL DELIVERS THE STRONGEST IMPACT ON BRAND CHOICE

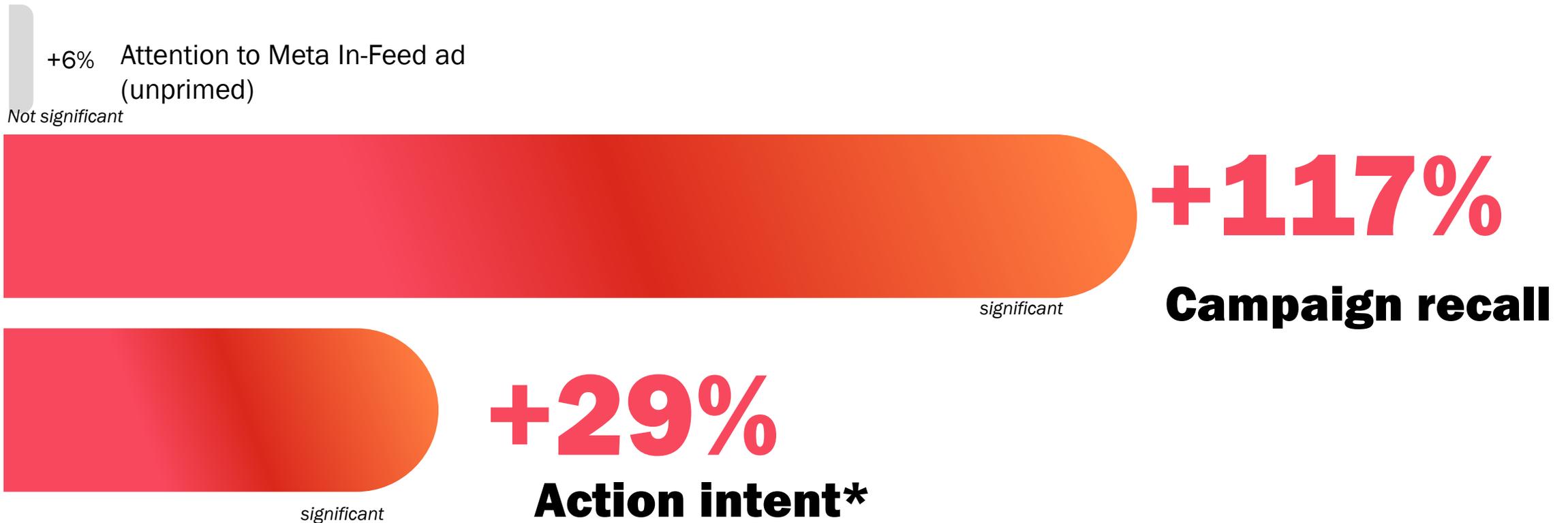


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# WESTFIELD: THE PRIMING ENVIRONMENT

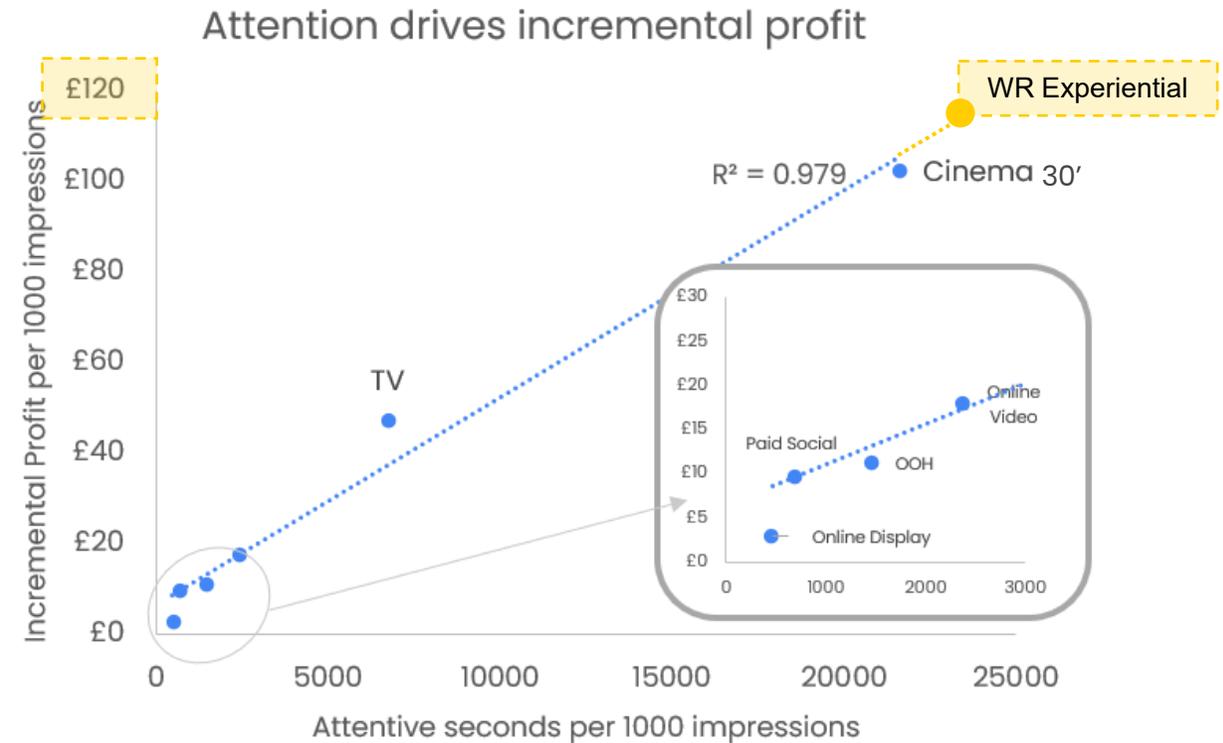
EXPOSURE TO CAMPAIGNS WITHIN WESTFIELD SIGNIFICANTLY AMPLIFIES THE PERFORMANCE OF SUBSEQUENT DIGITAL ACTIVITY

Lift in Meta In-Feed ads *after* being primed by Westfield Rise Inventory (vs unprimed)



# IMPLICATIONS FOR ADVERTISERS: DRIVING INCREMENTAL PROFIT

LUMEN predict Westfield experiential can generate **+20% more incremental profit per 1,000 impressions than cinema 30'**



# WHAT NOW?

## IMPLICATIONS OF THE RESEARCH

1. When traded using OTC, Westfield Rise inventory offers less wastage than other media
2. Brands can capitalise on short bursts of attention and impact (OOH) to prompt consumers with quick messages designed for 2-4 seconds viewing time to maximise effectiveness
3. Deeper, sustained levels of attention (experiential) can be used to generate significant changes in recall / awareness and brand choice. Experiential generates a significant quantity of attention for brands vs. other media
4. Media planners should consider the significant priming effects on other media when planning a campaign, to optimise the media plan fully.

Westfield inventory delivers:

**BRAND RECALL**

**BRAND CHOICE**

**ACTION INTENT**

**A PRIMING  
ENVIRONMENT**



Westfield

JOHN  
LEWIS  
& PARTNERS

THE TERRACE

Westfield

WESTWOOD

**THANK YOU**  
*For your attention*