



REDIFFUSION'S  
INTELLIGENCE  
REPORT



# ATTENTION

THE REPORT NOBODY CAN  
LOOK AWAY FROM

**YOU DIDN'T  
CHOOSE TO OPEN  
THIS REPORT.  
SOMETHING  
CAUGHT YOUR EYE.**

That moment — that flicker of a choice — is what every brand on earth is waging a war over. **WELCOME TO THE ATTENTION ECONOMY.** You've always lived in it. You're just only now starting to see it.

# THE WORLD'S MOST VALUABLE RESOURCE ISN'T OIL, DATA, OR MONEY. IT'S THE 8 SECONDS SOMEONE CHOOSES TO SPEND ON YOU.



Dr. Gloria Mark  
Ph.D

**47s**

Average attention span on any screen – down from 2.5 minutes in 2004

Dr. Gloria Mark  
UC Irvine / APA

**85%**

Online ads that fail the 2.5-second attention-memory threshold

Amplified Intelligence

**3x**

Attention generated by streaming ads vs. linear TV norms

Amazon Ads × Dentsu  
× Lumen

**2024**

Oxford Word of the Year: 'Brain Rot' – the first digitally-born cognitive crisis term

Oxford Languages

amazon ads

Amplified Intelligence

LUMEN

Oxford Languages

A comprehensive intelligence report on how attention became the world's most contested resource – and what brands, advertisers, and humans must do about it.

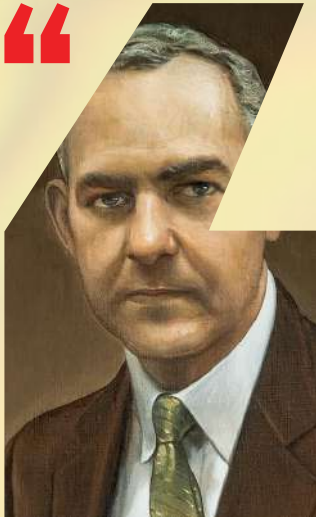
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CHAPTER 01 | THE FOUNDATION

# THE ECONOMY YOU NEVER SIGNED UP FOR

The origin, the theory, the infrastructure.



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

Herbert A. Simon, Nobel Laureate, 1971

A Nobel Prize-winning economist named **Herbert Simon** said it first, and said it well. In 1971, he wrote the defining statement of our digital age – before the internet existed. He understood something the rest of the world is still catching up to: attention is the bottleneck of human existence. We can produce infinite content, infinite products, infinite messages – but we cannot produce more time to pay attention to them.

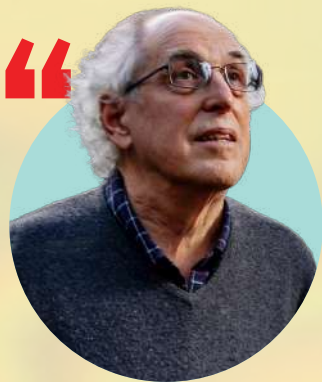


Thomas H. Davenport

**Thomas H. Davenport** and **John C. Beck**, in their landmark 2001 Harvard Business School book, defined it precisely: “Attention is focused mental engagement on a particular item of information. Items come into our awareness, we attend to a particular item, and then we decide whether to act.” That single moment of choosing to attend is what every brand, every platform, and every publisher is racing to capture.



John C. Beck



Michael Goldhaber

**Michael Goldhaber** predicted the shape of the internet economy in 1997. His crucial insight: **attention is a zero-sum game**. When one thing earns it, everything else loses it. By 1999, **Georg Franck** went further – arguing that “**income in attention ranks above financial success**” for advertising-driven media. The attention economy also generates what economists call ‘**negative externalities**’ – costs borne by society at large: social media addiction, fake news amplification, surveillance capitalism (the harvesting and selling of personal data), and the marginalisation of minority voices. The **UN Economist Network** has formally recognised the attention economy as a source of measurable social harm.



### A TIMELINE OF THE ATTENTION ECONOMY

- 1971** Herbert Simon published his seminal work on ‘attention scarcity’. The concept of an Attention Economy is born in academic circles.
- 1997-99** Goldhaber and Franck independently predict that attention – not money – will be the defining currency of the internet era.
- 2001** Davenport & Beck published “The Attention Economy” (Harvard Business School Press) – the first major business framework built entirely around attention.
- 2004** Dr. Gloria Mark of UC Irvine begins her landmark longitudinal attention research. Average on-screen attention span: 2.5 minutes.
- 2006** Facebook opens to the public. The race for attention becomes trillion-dollar infrastructure.

- 
- 2012** Dr. Mark's research: the average on-screen attention span has dropped to **75 seconds** – almost half of 2004.
- 
- 2013** Tristan Harris writes his internal Google presentation: '**A Call to Minimise Distraction.**' The industry ignores it.
- 
- 2017** Tim Wu coins '**attention theft**'. Tristan Harris gives his landmark **TED Talk**.
- 
- 2023** Dr. Mark's latest research: average on-screen attention span has collapsed to **47 seconds**.
- 
- 2024** The **Oxford Dictionary** names '**Brain Rot**' its Word of the Year – the first digitally native cognitive crisis term to earn this distinction.
- 
- 2024-25** **Amazon Ads** and **Lumen Research** publish landmark streaming attention studies. The **IAB/MRC** released the first comprehensive attention measurement framework.



We are now living in what researchers describe as the most complex attentional environment in human history. There are more screens, more sources, more voices, more ads, and more notifications than at any point in our evolutionary story, and our brains are running the same hardware they were 10,000 years ago.

## A WEALTH OF INFORMATION CREATES A POVERTY OF ATTENTION.

The more we have to pay attention to, the less we truly attend to anything. This is not a flaw in us. This is the mathematics of scarcity. And the entities that understand this scarcity and engineer for it will define the next century of commerce, culture, and power.

## CHAPTER 02 | THE SCIENCE

# YOUR BRAIN IS THE BETA VERSION

And Silicon Valley has found every exploit in the code.



**Your brain didn't evolve for the world it now lives in. But the algorithms that harvest your attention, evolved for exactly this brain.**

Here is a fact that should rattle every marketer, every parent, and every person who has looked up from their phone to find an hour has passed: social media platforms are engineered using the same psychological mechanisms as slot machines. This is not an accusation. It is the architecture, documented in peer-reviewed research and admitted by the people who built it.

**Dr. Gloria Mark**, Chancellor's Professor of Informatics at **UC Irvine**, has studied human attention longitudinally since **2004**, longer than almost any other researcher in this field. Speaking on the APA's flagship podcast *Speaking of Psychology*, she reported findings that should alarm every leader, every teacher, and every parent: **"Around 2012, we found it to be 75 seconds, and in the last six years, we found it to average about 47 seconds."** To put that in context: when her research began in **2004**, the average was two and a half minutes. In two decades, we've lost more than two-thirds of our on-screen attention span. And the trajectory is not flattening.



**B.F. Skinner**  
Psychologist

At the core of the collapse is dopamine, the brain's reward and motivation chemical. This is called a variable reward schedule, first described by **B.F. Skinner** in the **1930s**. Uncertain rewards are far more compelling than predictable ones. Slot machines pay out randomly, and that's precisely why people can't stop pulling the lever. **Pull-to-refresh is a slot machine.** You never know if you'll get something good. And so you keep pulling.



**Tristan Harris, NPR**

# 47s

Average on-screen attention span today — down from 150s in 2004 and 75s in 2012.

—  
**Dr. Gloria Mark**  
APA / UC Irvine 2023

# 62%

Increase in the brain's pleasure response when TikTok switches content type unexpectedly.

—  
**EEG Research 2024**



**Johann Hari**  
Stolen Focus

# 80%

People check their phone within minutes of waking up.

—  
**Tristan Harris, NPR**

# 65s

Average time before a college student self-interrupts from their current task.

—  
**Johann Hari, Stolen Focus**

# “



Infinite scrolling uses the same neural exploit as slot machines. With each scroll, a small dose of dopamine is released. The uncertainty of what you'll find next is what makes it impossible to stop.

# ”

Perspectives in Public Health, 2025



The neuroscience is damning: prolonged social media use literally reshapes the brain. The prefrontal cortex, responsible for reason, delayed gratification, and deep focus, is losing the battle against algorithms designed by the world's smartest engineers to defeat it. This is not a personal failing. It is an engineering problem masquerading as a character flaw.

**Dr. Mark** also documents the physiological cost of multitasking. Her research measures elevated cortisol levels in workers who are frequently interrupted. The damage is not just cognitive. It is physical. And it accumulates. She advocates for what she calls a **'right to disconnect'**, structured boundaries between work and personal time that allow the brain to genuinely recover. Without recovery time, the attention deficit compounds. The attention economy has all but eliminated the concept of genuine mental rest from modern life.

## RESEARCH INSIGHT

**Dr. Mark** advocates for a 'right to disconnect' policy – structured boundaries that allow the brain to genuinely recover. Without recovery time, the attention deficit compounds. The brain, like a muscle, cannot perform at high levels without rest. The attention economy has all but eliminated the concept of genuine mental rest from modern life.





Technology is not neutral. The race for attention always ends at the bottom of the brainstem – in outrage, in emotion, in the lizard brain. Because that’s the only way to win.



Tristan Harris, former Google Design Ethicist, TED 2017



CHAPTER 03 | THE SYSTEM BUILDERS

# THE PUPPET MASTER OF SILICON VALLEY



How a handful of companies came to control billions of minds every day

Imagine a control room. Thousands of designers, psychologists, and engineers are turning dials – dials that adjust how a billion people feel, think, and behave. That room exists. It’s every major tech company’s product office.

Tristan Harris coined the term ‘human downgrading’ – the interconnected system of addiction, distraction, isolation, and polarisation that weakens human capacity on a civilisational scale. His central argument: there is a hidden goal driving every piece of technology we build – the race for your attention. Those minutes are the product. Those minutes are sold to advertisers.



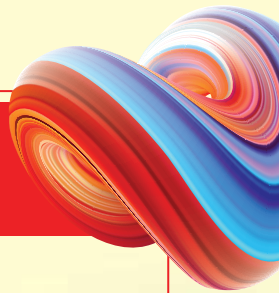
Tim Wu

Tim Wu, a legal scholar and author of **The Attention Merchants**, formalised the concept of ‘attention theft’ – arguing that ads imposed on captive audiences without compensation constitute a form of theft. Demanding the most valuable thing a person has (their time and focus) while paying them nothing in return. This concept has since entered policy circles, with researchers proposing ‘interrupt rights’ and ‘attention bonds’ as market mechanisms to make the cost of demanding attention more honest.



Kevin Kelly

Kevin Kelly, co-founder of **Wired**, identified eight intangibles that in the attention economy are worth more than the content itself. Understanding these is a masterclass in what brands must provide to earn genuine attention.



## KEVIN KELLY'S 8 INTANGIBLES OF THE ATTENTION ECONOMY



### IMMEDIACY

Priority access and instant delivery. People will pay for what arrives before the crowd.



### PERSONALISATION

Tailored just for you. Generic is free; specific is priceless.



### INTERPRETATION

Support, context, and guidance. Raw information is abundant; meaning is scarce.



### AUTHENTICITY

The real thing, verified. In an age of deepfakes and AI, genuine provenance commands a premium.



### ACCESSIBILITY

Wherever, whenever, effortlessly. Friction is the enemy of attention.



### EMBODIMENT

The physical experience. Live events and real objects – what screens cannot replicate.



### PATRONAGE

Paying simply because it feels good to support something meaningful.



### FINDABILITY

Being discovered in a world of millions. When everything is available, being found is the competitive advantage.

Called ‘the closest thing Silicon Valley has to a conscience’ by The Atlantic, Harris coined the term ‘**human downgrading**’ and inspired The Social Dilemma. He continues to brief governments and heads of state on the systemic risks of unregulated attention architecture.

**“The reason it feels like it’s sucking us in is the race for attention. Technology becomes a race to the bottom of the brainstem – to outrage, to emotion, to the lizard brain.”**



**TRISTAN HARRIS**

Former Google Design Ethicist  
Center For Humane Technology

Raskin invented infinite scroll – eliminating natural stopping points and turning browsing into an endless loop. He estimates his invention costs humanity 200,000 hours of lost time per day.

**“If you don’t give your brain time to catch up with your impulses, you just keep scrolling. I feel tremendous guilt.”**



**AZA RASKIN**

Inventor Of Infinite Scroll  
Co-Founder, Center For Humane Technology

Haugen’s leaked ‘Facebook Papers’ confirmed that Meta knowingly amplified divisive, emotionally charged content because it kept users engaged longer. Research by the Hanken School of Economics has since confirmed that the attention economy paired with digital advertising, incentivises the circulation of fake news for profit.

**“Facebook knows. They choose profit. Algorithms don’t care about your well-being, they care about your attention.”**



**FRANCES HAUGEN**

Former Facebook Product Manager  
Whistleblower



## DOCUMENTED DESIGN PATTERNS THAT EXPLOIT HUMAN PSYCHOLOGY

### INFINITE SCROLL

Removes natural stopping points

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### VARIABLE REWARDS

Unpredictable likes and notifications

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### STREAKS & COUNTERS

Loss aversion engineered as a product feature

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### AUTOPLAY

The next hit before you decide you want it

---

### PUSH NOTIFICATIONS

Interrupting your thoughts on demand

---

### SOCIAL PROOF

Public likes count as anxiety triggers

---

### FOMO DESIGN

Stories that disappear. Live notifications. Countdown clocks.

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### HYPER-PERSONALISATION

The algorithm that knows you better than you do

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### AD FATIGUE ENGINEERING

Serving ads just below the threshold that triggers irritation

## CHAPTER 04 | THE SHORT-FORM EPIDEMIC

# BRAIN ROT, TIKTOK & THE MEMORY EXPERIMENTS

When Oxford names your problem the Word of the Year, you have a civilisational crisis.

**Oxford Dictionary's Word of the Year 2024: 'Brain Rot'. Definition: the supposed deterioration of a person's mental or intellectual state, especially as a result of overconsumption of material considered to be trivial or unchallenging. Sound familiar?**

The coinage of **'brain rot'** as the defining word of **2024** is not a casual cultural observation. It is the mainstream vocabulary catching up to a scientific reality that researchers have been documenting for years. In a controlled experiment at **Ludwig Maximilian University of Munich**, **60** participants were tested on prospective memory, the ability to remember to carry out an intended action after an interruption. Participants were given a task, then interrupted with either **TikTok**, **Twitter**, or **YouTube**, and then asked to return to their original goal.

**TikTok was the decisive destroyer.** After using TikTok, participants' performance cratered so severely that they were only slightly better than random guessing. **Twitter and YouTube showed no measurable impact.** When researchers investigated why, controlling for social media addiction, absent-minded phone use, and general boredom, none of those factors explained the effect. The culprit was the format itself: rapid-fire short-form video combined with constant, frictionless task-switching. A completely independent research team replicated the results in a study published in **February 2025**. Two labs. Same result.



Short-form video, as a format, systematically impairs your brain's ability to hold onto intentions. And the habit, once formed, extends beyond the app. Dr. Gloria Mark's research provides the cognitive mechanism: every time we switch tasks, and short-form video is a machine for maximising task-switches, we incur a 'switch cost'. In a TikTok session, a user might switch contexts hundreds of times. The cumulative switch cost is enormous.

**60**

Participants in the Munich LMU study on TikTok and prospective memory impairment

Ludwig Maximilian University, 2023

**~0%**

Meaningful accuracy improvement above random guessing for TikTok users recalling their interrupted task

LMU Munich  
Replicated Feb 2025

**2024**

Year Oxford named 'Brain Rot' Word of the Year – first digitally-born cognitive crisis term to receive this distinction

Oxford Languages

**2x**

Independent studies have confirmed: short-form video as a format damages prospective memory

arXiv 2023  
Taylor & Francis 2025



**TikTok doesn't just distract you – it actively impairs your brain's ability to hold onto intentions. You don't forget because you're having too much fun; you forget because the system is optimised to keep you swiping, constantly searching, but never remembering.**

– VICE, January 2026



The generational dimension is the most troubling. Researchers note that 1.4 million children under 13, below TikTok's own age restriction, are active on the platform. These children's prefrontal cortex is still developing; their capacity for sustained attention, delayed gratification, and executive function is literally being shaped in real time. The short-form epidemic is not just altering the attention of adults who have already developed those capacities. It is shaping the brains of children who have not.

## THE BRAND IMPLICATION

### YOU CANNOT WIN ON SHORT-FORM AND EXPECT LONG-FORM LOYALTY.

The same format that drives reach is wiring your audience to forget you. Short-form is essential for discovery but it cannot be the only channel. The depth of a relationship – trust, loyalty, and long-term value – requires a different attention environment. Use short-form to earn the door. Build the relationship somewhere quieter.

CHAPTER 05 | THE HUMAN COST

# FOCUS DIDN'T LEAVE. IT WAS STOLEN.

The landmark research of Johann Hari and why the crisis is not your fault.

**You are not lazy. You are not weak. You have not failed at focus. You are living in a system that is pouring acid on your attention every day and then blaming you for the burns.**

Johann Hari, author of *Stolen Focus*, spent three years interviewing over 200 of the world's leading scientists. His conclusion was stark and counterintuitive: the global attention crisis is not a personal failing. It is a structural crime. The average American office worker now focuses on a single task for just **three minutes** before being interrupted. **College students average just 65 seconds.** Even **Fortune 500 CEOs get only 28 minutes** of uninterrupted focus per day. This is not a generation of weak-willed people. This is an engineered collapse.



**THE 12 FACTORS — JOHANN HARI,  
STOLEN FOCUS (2022)**

- 01** Increased speed, switching & filtering of information
- 02** Crippling of flow states and deep creative work
- 03** Rise of physical and mental exhaustion
- 04** Collapse of sustained reading habits
- 05** Destruction of mind-wandering and idle thinking time
- 06** Induced stress and digital surveillance
- 07** Destruction of children’s unstructured play
- 08** Rising rates of ADHD diagnosis and medication
- 09** Algorithmic hijacking of attention by platforms
- 10** Poor diet and nutrition deficiencies affecting cognition
- 11** Environmental pollution impacting brain health
- 12** Collective trauma and sustained societal crisis



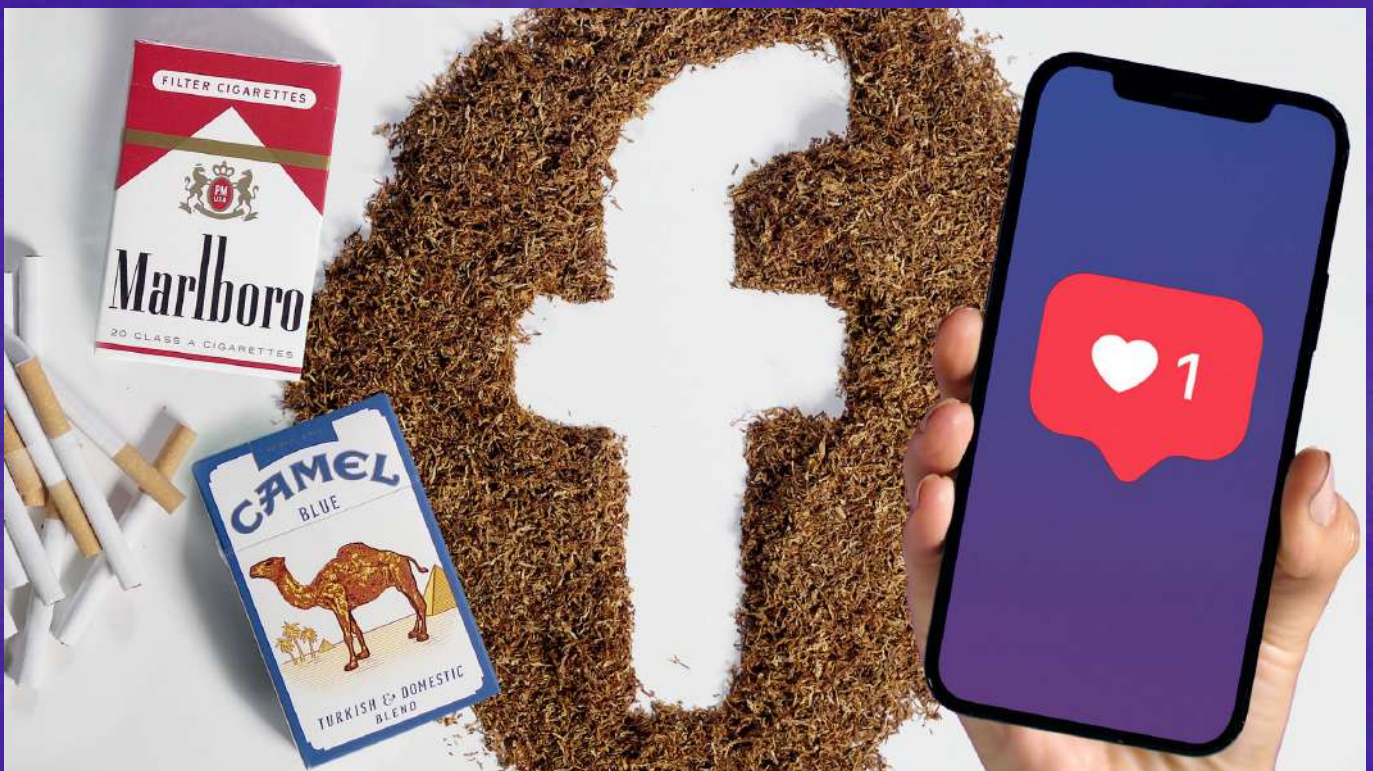
**“Your attention didn’t collapse. It was stolen by big and powerful forces. You haven’t become weak. You’ve been hacked.”**

**JOHANN HARI**

Stolen Focus (2022)

When **Facebook** offers you a ‘screen time’ feature, it is performing accountability while designing the very addiction it pretends to cure. It is a **tobacco company selling nicotine patches**. Telling you to control yourself while engineering systems to defeat that control.

**Flow** – the state of deep, focused immersion in meaningful work is our highest form of sustained attention. It produces our greatest creativity, our deepest satisfaction, and our most meaningful achievements. **The attention economy systematically destroys it**. Because flow doesn’t generate ad revenue. Distraction does.



**57% of Americans do not read a single book in a typical year. Instead, they spend 5.4 hours on their phone. The collapse of deep reading is not just a cultural loss. It is a cognitive one.**

CHAPTER 06 | THE BRAND PLAYBOOK

# DAY TRADING EYEBALLS — THE NEW BRAND GOSPEL



What Gary Vee saw before anyone else dared to look.



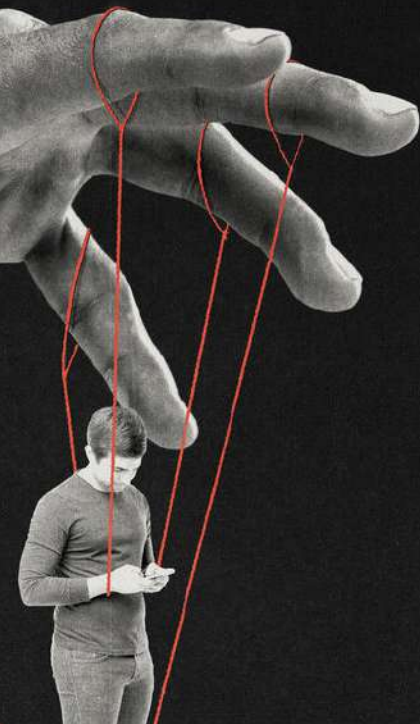
If you don't have attention, it doesn't matter what you say.



Gary Vaynerchuk, CEO, Vayner Media

Gary Vaynerchuk's 2024 book, 'Day Trading Attention', reframes marketing for an era where attention is no longer assumed — it is won or lost every single second. His thesis: go where attention is high and competition is low. He calls this 'underpriced attention.' TikTok in 2019 was the canonical example. Brands that showed up early built massive audiences at almost zero cost. Those who waited paid exponentially more for exponentially less.

Vaynerchuk also identifies the 'TikTokification of social media', the structural shift from follower-based algorithms to interest-based algorithms. A small brand with extraordinary content can now outperform a giant brand with a massive media budget. The playing field is tilted toward the creative and the agile, away from the rich and the complacent.





**\$400B**

Projected global native advertising market by 2025 – a 372% increase from 2020

AdYouLike Projections

**31%**

Of consumers say social media ads currently capture their attention – down from 43% the year prior

Kantar Media Reactions 2024

**47 min**

Average sustained brand engagement during gaming activations vs. 1.7 seconds for display ads

Attention Economy Report 2025

**36%**

Of consumers trust traditional brand advertising. The era of command-and-interrupt is over

Instreamly 2025



Your only job as a brand is to figure out where the attention currently is and how to be great at it. The platform is irrelevant. The attention is everything.

”

Gary Vaynerchuk, Day Trading Attention (2024)



The story of Nathan Apodaca — aka @doggface — illustrates the point perfectly. A man skateboarding to work, sipping Ocean Spray cranberry juice, lip-syncing to Fleetwood Mac. A single, unpolished, authentic TikTok video. No media budget. No production crew. Ocean Spray sold out nationwide. Its stock surged. One human moment, freely shared, outperformed decades of traditional advertising. This is the new economics of attention.



## CHAPTER 07 | THE ADVERTISING RECKONING

# 2.5 SECONDS TO MIDNIGHT THE AD INDUSTRY'S CRISIS

When 85% of your advertising investment quietly fails before anyone notices

An ad that was 'viewed' is not an ad that was seen. And an ad that was seen is not an ad that was remembered. The gap between these three states is where billions of dollars disappear every year.

For decades, the advertising industry operated on a comforting lie: that a 'viewable impression' is the same as attention. It is not. Research from Amplified Intelligence delivers the uncomfortable verdict: approximately 85% of online ads do not pass the 2.5-second attention-memory threshold. The majority of digital advertising budgets are being spent on impressions that vanish before they can have any effect.

The most ambitious response to this crisis has come from Amazon Ads and Dentsu, who commissioned Lumen Research to conduct a landmark joint study: over 1,000 ads from 76 brands, analysed across Amazon Freevee, Twitch, and Amazon Music. Amazon Freevee generated 3x the attention of linear TV norms. Amazon Music and Twitch generated 2.6x and 2x, respectively. The key mechanism: premium content that audiences already love creates an attentional halo around the ads within it. **Context is attention.** The environment in which your ad appears is as important as the ad itself.



freevee

twitch

amazon  
music

The research also illuminated the role of frequency. There is a frequency sweet spot for every medium. Before it, attention is building. After it, ad fatigue sets in, where excessive exposure leads to reduced engagement and active avoidance. Understanding this curve is the new media planning.

**amazon ads** × **dentsu** × **LUMEN**



**3x**

Attention generated by Amazon Freeve ads vs. linear TV norms

Amazon Ads × Dentsu × Lumen 2023

**2.6x**

Attention generated by Amazon Music ads vs. Dentsu attention norms

Amazon Ads × Dentsu × Lumen 2023

**1.5s**

Minimum active attention to encode brand memory – with the right distinctive assets

VCCP Media × Dr. Karen Nelson-Field

**40%**

Boost in in-market ad awareness from just a 5% increase in genuine active attention

Dentsu Attention Economy Research



Dr. Karen Nelson-Field





Brands are too focused on the time their ad is in view. What matters is the time it is actually viewed with active attention. You can drive outcomes in just 1.5 seconds. But not without doing better.



Dr. Karen Nelson Field, Founder, Amplified Intelligence

At Advertising Week 2025, a watershed moment: clicks and impressions were barely discussed. The entire conversation shifted to attention. The IAB and MRC have now finalised the first comprehensive attention measurement framework. Brands that adopt these standards first will gain the clearest picture of true advertising effectiveness.

## THE ATTENTION-EFFECTIVENESS EQUATION: WHAT 2025 MADE OFFICIAL

**THE QUESTION HAS CHANGED.  
AND SO HAS THE ANSWER.**

**OLD:** How many people SAW the ad?

**NEW:** How many people ATTENDED – and acted?

**OLD:** Viewability, Impressions, Reach

**NEW:** Active Attention Seconds,  
Attention-Adjusted ROI

**OLD DANGER:** Low-quality impressions

**NEW DANGER:** Ad fatigue training audiences  
to ignore you

## CHAPTER 07A | THE MATHEMATICS OF ATTENTION LOSS

# THE COST OF ONE SECOND

The advertising industry has spent decades arguing about reach, frequency, and creative quality. It has largely avoided the one conversation that makes CFOs uncomfortable: what is the precise financial cost of attention that never actually arrives?

**An ad that was ‘viewed’ is not an ad that was seen. And an ad that was seen is not an ad that was remembered. The gap between these three states is where billions of dollars disappear every year.**

Imagine a brand – call it Brand X – runs a digital video campaign in India. The media plan looks impressive: **50 million** impressions, a **CPM of ₹180**, a total media spend of **₹90 lakhs**. The campaign runs. The dashboard turns green. Viewability scores come back at **72%**, above the industry benchmark. The marketing team presents a slide that says **‘36 million people saw our ad.’** The CEO nods. The agency gets a case study.

Here is what the dashboard did not show. Of those **50 million** impressions, approximately **85%** – **42.5 million** – did not cross the **2.5-second** active attention threshold required to begin encoding brand memory. They were technically viewable. They were not actually viewed. Of the remaining **7.5 million** impressions that did cross the threshold, only those with strong, immediately recognisable brand assets – logo, colour, character, character, and sonic identity – had any chance of converting attention into recall. Without clear distinctive assets in the first frame,



research by VCCP and Amplified Intelligence suggests even those **7.5 million** impressions lose roughly **60%** of their potential effectiveness.

So from ₹90 lakhs of media spend, the number of impressions doing real, memory-encoding work is somewhere in the range of 3 million. The effective CPM – the cost per impression that actually worked is not ₹180. It is closer to ₹3,000.

This is not a hypothetical. This is the current operating reality of digital advertising, measured by eye-tracking technology, EEG data, and brand lift studies conducted by the most rigorous attention researchers in the world. The gap between the number on the media plan and the number doing actual cognitive work is, in most campaigns, enormous and almost entirely invisible to standard measurement tools.

**₹90L**

Typical digital campaign media spend – appearing effective by standard viewability metrics

Illustrative India example

**85%**

Of those impressions failing the 2.5-second attention-memory threshold – functionally wasted

Amplified Intelligence

**₹3,000**

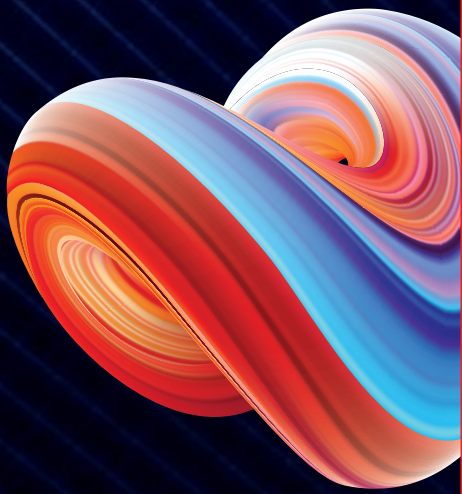
Effective CPM once only genuinely attended impressions are counted – vs. the planned ₹180

Attention Economics Calculation

**5%**

Increase in genuine attention that produces 40% boost in ad awareness – the exponential relationship

Dentsu Research



## THE THREE COSTS NOBODY MEASURES

**THE TRUST COST.** Every intrusive, irrelevant, or forgettable ad a brand runs is a withdrawal from the emotional bank account it holds with its audience. In a world where 64% of consumers report actively avoiding brands that advertise too aggressively, the negative ROI of bad attention is real and measurable, even if rarely measured.

**THE CREATIVE COST.** When brands optimize for reach rather than attention, they deprioritize creative quality because in an impressions-based world, the number of ads matters more than how good any individual ad is. The result is a race to produce more, faster, cheaper. More content. Less craft. Less attention. This is a self-reinforcing spiral that degrades the entire ecosystem.

**THE COMPOUND COST.** A brand that consistently earns genuine attention builds what researchers call ‘mental availability’, a position in the consumer’s mind that costs less to maintain over time and pays more dividends at the moment of purchase. A brand that consistently wastes attention is not standing still. It is actively spending down its mental availability every quarter. The cost of that erosion does not appear on any balance sheet. But it shows up in market share.

## THE ONE-SECOND RULE

EVERY PIECE OF COMMUNICATION A BRAND PRODUCES SHOULD BE STRESS-TESTED AGAINST THE FIRST SECOND.

Does the first frame communicate brand, emotion, and curiosity? Does the first word of this headline create tension the reader must resolve? Does the first note of this audio ad trigger recognition or intrigue? If the first second could belong to any brand, any category, or any generic piece of content – then the remaining 29 seconds, 29 pages, or 29 years of media spend are built on a foundation that will not hold. One second is not a constraint. It is brief.



## CHAPTER 08 | THE INDIA CHAPTER

# THE WORLD'S MOST CONTESTED ATTENTION MARKET

Everything you've read was about a global crisis. This is about where the crisis is most intense, most complex, and most consequential.

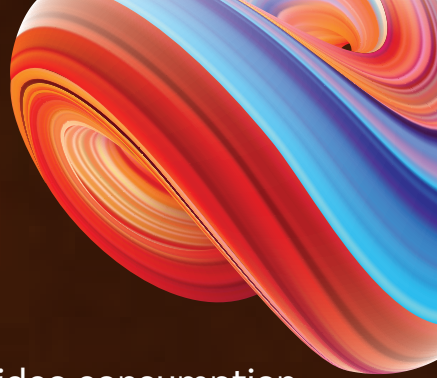
**India is not a participant in the global attention economy. India is its epicentre. And this is Rediffusion's chapter — the view that no report written in New York or London will ever provide.**

With 750 million smartphone users, the world's largest base of first-generation internet users, the highest average daily social media consumption in Asia, and a media landscape that is simultaneously ancient and radically new — India represents the single most contested attention market on earth. Every global platform is fighting for Indian eyeballs. Every Indian brand is fighting for the same finite pool of human focus. And the rules of the game are different here.

## THE NUMBERS, FIRST

India has the highest average daily social media usage in Asia, at approximately 2 hours and 36 minutes per day, above the global average and above China, Japan, and South Korea. The average Indian smartphone user unlocks their phone 52 times per day. WhatsApp commands over 500 million active Indian users and is not a social media app but an infrastructure, the primary communication channel for a significant portion of the country. YouTube reaches over 467 million Indian users monthly, making India YouTube's single largest market in the world by user count.





Short-form video consumption in India is not a trend. It is the primary mode of content consumption for an entire generation. Following the ban-and-reinstatement cycle of TikTok in India, the vacuum was filled by YouTube Shorts, Instagram Reels, and homegrown alternatives – but the appetite, once created, only intensified. India produces and consumes more short-form video content than any other country on earth.

**750M**

Smartphone users in India – the world’s largest and fastest-growing first-generation internet base

—  
TRAI / Statista 2024

**2h36m**

Average daily social media time in India – the highest in Asia, above the global average

—  
DataReportal 2024

**52x**

Average daily phone unlocks per Indian smartphone user

—  
India Mobile Report 2024

**467M**

Monthly active YouTube users in India – the platform’s single largest country audience

—  
YouTube India 2024





**THE IPL – THE WORLD’S GREATEST ATTENTION EVENT**

The IPL is the single largest attention event in the annual global advertising calendar. For approximately **60 days** every year, hundreds of millions of Indians synchronise their attention around one property, simultaneously, emotionally, and communally. **No Super Bowl, no World Cup, no Olympics** generates the concentration of voluntary, **high-quality attention that the IPL does in India**, at the scale it does. Brands that understand this are buying not just eyeballs but emotional states – **the excitement, the tribalism, the shared moment** – that are the rarest and most valuable contexts in the entire attention economy.



**THE BHARAT DIMENSION**

The attention economy, as described by Western researchers, assumes a context that does not fully apply to the majority of Indian internet users, particularly those entering digital life for the first time through a JioCinema or a shared smartphone in a small town in **Uttar Pradesh, Bihar, or Rajasthan**. For these users, the digital experience is not a layer on top of an existing media diet. It is the media diet, arrived at fully formed, algorithm first, with no preceding era of newspapers, cable television, or desktop internet to provide context or comparison.

These users are not cynical. They are not ad-fatigued in the way that a **35-year-old** Mumbai professional is. They are, in many cases, genuinely open to brands that speak to them in their language, in their context, and according to their values. The attention is there. It is waiting to be earned. The question is whether Indian brands and the agencies that serve them are willing to do the work required to earn it.

## JIOCINEMA AND THE STREAMING ATTENTION WAR

The launch of JioCinema as a free streaming platform – carrying IPL, international sports, and an expanding library of premium content – represents one of the most dramatic attention economy events in Indian media history. By removing the paywall from premium content and monetising it through advertising, Reliance created the world’s largest free-to-air premium streaming audience essentially overnight.

Research consistently shows that audiences watching premium content they have actively chosen generate higher-quality attention for surrounding advertising than passive or incidental consumption. JioCinema has created an enormous inventory of this premium attentional context. Brands that understand the streaming attention research and apply it to the Indian streaming landscape will find themselves with an enormous first-mover advantage. The brands that show up with creative excellence, strong, distinctive assets, and genuine contextual relevance will find streaming India to be the most rewarding attentional environment in the history of Indian advertising.

## THE LANGUAGE OF ATTENTION

One of the most significant and least-discussed dimensions of the Indian attention economy is language. India has 22 officially recognised languages and hundreds of dialects. The majority of first-generation internet users consume content primarily in their mother tongue – Hindi, Tamil, Telugu, Kannada, Bengali, Marathi, and Gujarati. The brands and creators who are winning genuine attention in India’s tier-2 and tier-3 markets are doing so in the language of their audience, not translated, not dubbed, but genuinely conceived in that language, with cultural references, humour, and emotional registers that belong to that world. This is Kevin Kelly’s ‘personalisation’ intangible applied at the civilisational scale. Generic is free. Specificity is priceless.

India is not one attention market but many. The creative, cultural, and linguistic intelligence required to navigate that multiplicity is a genuine competitive advantage that no algorithm can replicate. This intelligence lives in agencies.

## THE INDIAN ATTENTION PARADOX

**INDIA IS SIMULTANEOUSLY THE WORLD'S MOST ATTENTION-RICH MARKET AND ONE OF ITS MOST ATTENTION-FRAGMENTED ONES.**

The sheer scale of the audience is unmatched anywhere on earth. And yet the fragmentation across languages, platforms, income levels, cultural contexts, and digital maturity stages means that no single message, format, or medium can reach all of that attention at once. The brands that win Indian attention in the next decade will be the ones that understand India is not one attention market but many.



## CHAPTER 09 | THE NEW PLAYBOOK

# WHAT BRANDS MUST DO RIGHT NOW

Earn it. Don't demand it. Deserve it.

**Attention is not bought. It is built, one story, one moment, one genuine connection at a time. The brands that understand this will define the next decade.**



## SIX PRINCIPLES FOR THE ATTENTION ERA

### 01. KNOW YOUR ASSETS

Distinctive brand assets, colours, characters, sonic branding, and visual identity are the attention multipliers. Dr. Karen Nelson Field's research shows well-branded ads are **2.5x more effective** than poorly branded ones. Audit your assets. Activate them consistently. Without them, even **10 seconds** of viewability is money evaporating.

### 02. HOOK IN THE FIRST FRAME

Whether it's a video, a headline, or an email subject line, **the opening must earn the next second**. Lead with tension, a bold claim, or genuine curiosity. In a world where TikTok has trained audiences to evaluate content in milliseconds, saying 'we'll get to the point in a moment' is not a strategy. It is a death sentence.





### 03. TRADE IMPRESSIONS FOR TRUST

The best brands treat creators as independent creative directors who craft audience-first content. **Kevin Kelly's 'authenticity'** intangible applies directly: genuine creator voices cannot be faked, and audiences can feel the difference. Authenticity is the new algorithm.

### 04. GO WHERE IT'S CHEAP

Underpriced attention is always somewhere. Gaming, podcasting, community platforms, live streaming, premium streaming, wherever the audience is real and the brands are absent, there is an opportunity. **Amazon's streaming data** proves this: **environments audiences love produce 2-3x the attention of environments they merely tolerate.**

### 05. MANAGE FREQUENCY LIKE A DRUG

Ad fatigue is real, measurable, and costly. **Dentsu's research** identifies medium-specific frequency sweet spots. One extra impression in the right moment builds brand choice. One too many trains your audience to look away. Know the difference.

### 06. BE WORTH THE BRAIN'S TIME

Nobody wants to watch advertising. They want to be entertained, moved, surprised, or informed. The bar is not 'did we run an ad?' The bar is 'would someone choose to watch this?'

The winner of the attention economy is not the brand with the biggest budget or the most screens. It's the brand with the most relevance, the most honesty, and the best story.



## CHAPTER 10 | THE WAY BACK

# RECLAIMING THE HUMAN MIND

Because the goal was never just to win the war for attention – it was to be worthy of it.

**If we only think about attention as a resource to be captured, we've already lost the larger point. The deeper question isn't, 'how do we get more of it?' – it's 'what are we doing with it?'**



The Center for Humane Technology, co-founded by Tristan Harris and Aza Raskin, advocates for 'time well spent' technology, systems designed around the deepest human values rather than engagement metrics. The **UN Economist Network** has formally recognised the need for policy responses to the attention economy's negative externalities.



Dr. Gloria Mark's research is explicit on neuroplasticity: the brain's capacity to rewire itself is not only the source of the problem. It is the source of the solution. A **2025** clinical trial at **McGill University** found significant improvements in attention among adults who participated in challenging cognitive exercises. **Another study found that simply blocking mobile internet improved sustained attention, equivalent to reversing a decade of cognitive ageing.** The brain can heal. But it needs the conditions to do so.

As consumers grow more conscious of attention manipulation, **brands that operate with transparency and respect that earn attention rather than steal it, will build deeper loyalty than any algorithm can generate.** In a world saturated with manipulation, dignity is a competitive advantage.



We need our smartphones and browsers to be exoskeletons for our minds — designed to put our values, not our impulses, first. People's time is valuable. And we should protect it with the same rigour as privacy and other digital rights.

”

Tristan Harris, *How Technology Hijacks Your Mind*



Attention is not just a currency. It is what it means to be alive. Every moment of genuine focus on a person, a problem, a story, or a craft is a moment of real living. Every moment of distracted, algorithmically-directed attention is a moment lived for someone else's business model.

CHAPTER 11 | THE FUTURE

# WHAT AI DOES TO THE ATTENTION ECONOMY NEXT

The flood is coming. The boats are not ready.

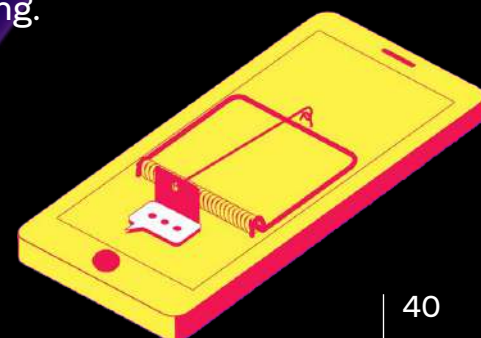
Every crisis described in this report was created by human beings working with human-speed tools. What comes next will be created by machines working at a speed humans cannot imagine, cannot match, and cannot fully govern.

Here is the situation as it stands. In 2022, the entirety of human-written text available on the internet was estimated at approximately 300 billion pages. Generative AI systems trained on that corpus can now produce an equivalent volume of text – articles, scripts, captions, campaigns, and novels – in a matter of weeks. The content supply, which was already vastly exceeding the attention available to consume it, is about to become essentially infinite.

**Infinite supply. Finite attention.** The economics of the situation are not difficult to understand. They are difficult to survive. There is no AI that can generate more hours in the day. There is no algorithm that can create more human attention. The scarcity that Herbert Simon identified in 1971 is about to become the defining crisis of the mid-21st century in a way that makes today's attention economy look, in retrospect, like a gentle warning.



Herbert Simon





## THE AI ATTENTION PARADOX

The same technology that is flooding the world with content is also the most powerful tool ever created for personalising it. AI-driven recommendation systems are already extraordinarily effective at predicting what any individual user will attend to next, and serving it to them before they consciously know they want it. As generative AI becomes more sophisticated, the logical next step is already being taken by several platforms: using a user's attention model to generate content specifically optimised for that user's attention patterns in real time. No content has been selected from the library of human-made videos. Content created, on demand, for you, engineered from the ground up to hold your specific attention as long as possible.

If the slot machine was the first generation of variable reward systems and the personalised algorithm was the second, this is the third – and it is orders of magnitude more precise. **Tristan Harris** described the current system as a race to the bottom of the brainstem. The AI-generated personalised content system is the same race, with a faster car and no speed limit.

## WHAT HAPPENS TO HUMAN CREATIVITY

The advertising industry's first response to generative AI has been a question of craft: **will AI replace copywriters, art directors, and strategists?** The more important question is: **what happens to the value of human creativity when the supply of creative output becomes infinite?** The answer, counterintuitively, is that genuinely human creativity becomes more valuable, not less. **Kevin Kelly's 'authenticity'** intangible – the demand for the real thing, verified – applies with particular force in an era when most content is AI-generated. The handmade object in a world of mass production commands a premium. The genuine emotion in a campaign conceived by a person with actual experience of the human condition lands differently than content optimised by a machine.



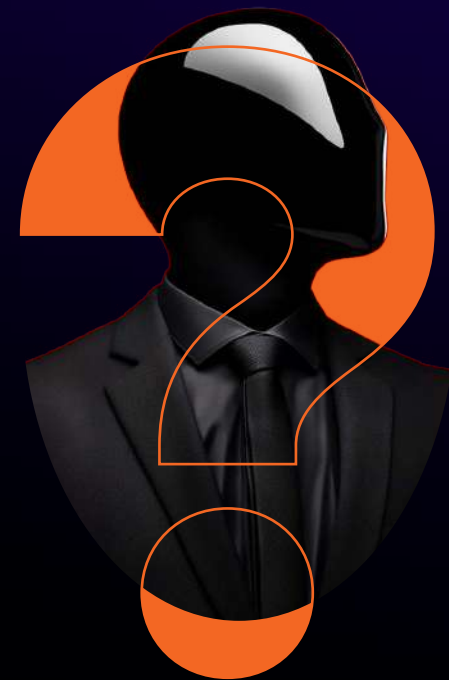


As audiences become more sophisticated about AI-generated content and they are becoming more sophisticated extraordinarily quickly, the ability to identify and respond to **genuine human creativity** will become a competitive differentiator. Brands that invest in real creative talent, real human insight, and real cultural intelligence will be distinguished from brands that outsource their communications to content generation at scale. The audience will know the difference. They already do.

### THE AI ADVERTISER — FRIEND OR THREAT

AI-powered media buying already operates at speeds and scales that no human media planner can match. The problem is that most AI media buying systems are currently optimising for the wrong things – click-through rates, video completion rates, viewability scores, and the same proxy metrics that have misled the industry for two decades. **An AI optimising for a bad metric makes the same mistakes faster, at greater scale, with greater confidence, and with less human oversight to catch the errors.**

The future of **AI in advertising** depends entirely on the signal it receives to optimise for. If that signal is genuine attention – measured with the rigour that **Dentsu, Amplified Intelligence**, and the **IAB** are now developing, AI could become the most powerful tool for earning human attention that the industry has ever had. If that signal remains impressions, clicks, and completion rates, AI will accelerate the existing dysfunction to a degree that makes the current crisis look mild.



## THE THREE FUTURES



In the first future, **regulation arrives**. Governments, learning from **GDPR** on data privacy – impose design standards on digital platforms. AI-generated content is labelled. Algorithmic amplification of outrage is structurally limited. Brands that have built genuine creative excellence are rewarded. **The extractors are penalised**. This is the hopeful future.



In the second future, the flood wins. AI-generated content overwhelms every platform. Attention continues to fragment. Advertising effectiveness collapses to the point where the current model, which serves enough impressions that some percentage of people buy something, becomes economically unviable. A new model, yet unformed, must emerge from the wreckage. This is the chaotic future.

In the third future – and this is the one that creative agencies should be building toward, human creativity becomes the scarcest and most valuable input in the entire content supply chain. AI handles volume, speed, personalisation, and distribution. Human creative intelligence handles meaning, emotion, cultural resonance, and the kind of genuine surprise that no language model can generate because it has not lived a human life.




## THE BRIEF FOR THE INDUSTRY

**IN A WORLD WHERE CONTENT IS INFINITE AND ATTENTION IS FINITE, THE ONLY SUSTAINABLE COMPETITIVE ADVANTAGE IS THE ABILITY TO CREATE SOMETHING GENUINELY WORTH ATTENDING TO.**

Not something engineered to capture attention by exploiting cognitive vulnerabilities. Not something optimised by an algorithm to trigger the most primitive available response. Something worth attending to – because it is true, because it is beautiful, because it is surprising, and because it makes the audience feel something real. That has always been the brief. AI just made it more urgent. The brands that fund that kind of work, and the agencies that can deliver it, will not just survive the coming flood. They will be the ones whose signal can still be heard above the noise when everything else has become indistinguishable from the roar.



# **PAY ATTENTION.** **TO EVERYTHING.**



The world's most valuable resource is finite, fought over, and disappearing. Every second of your attention you give to something is a second you've decided that thing is worth your life. Choose what you build that deserves it. Choose what you make that earns it. And every once in a while, put the phone down. Look up. Remember what uninterrupted thinking actually feels like. That is the brief. The canvas is the human mind. Don't waste a single pixel of it.

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