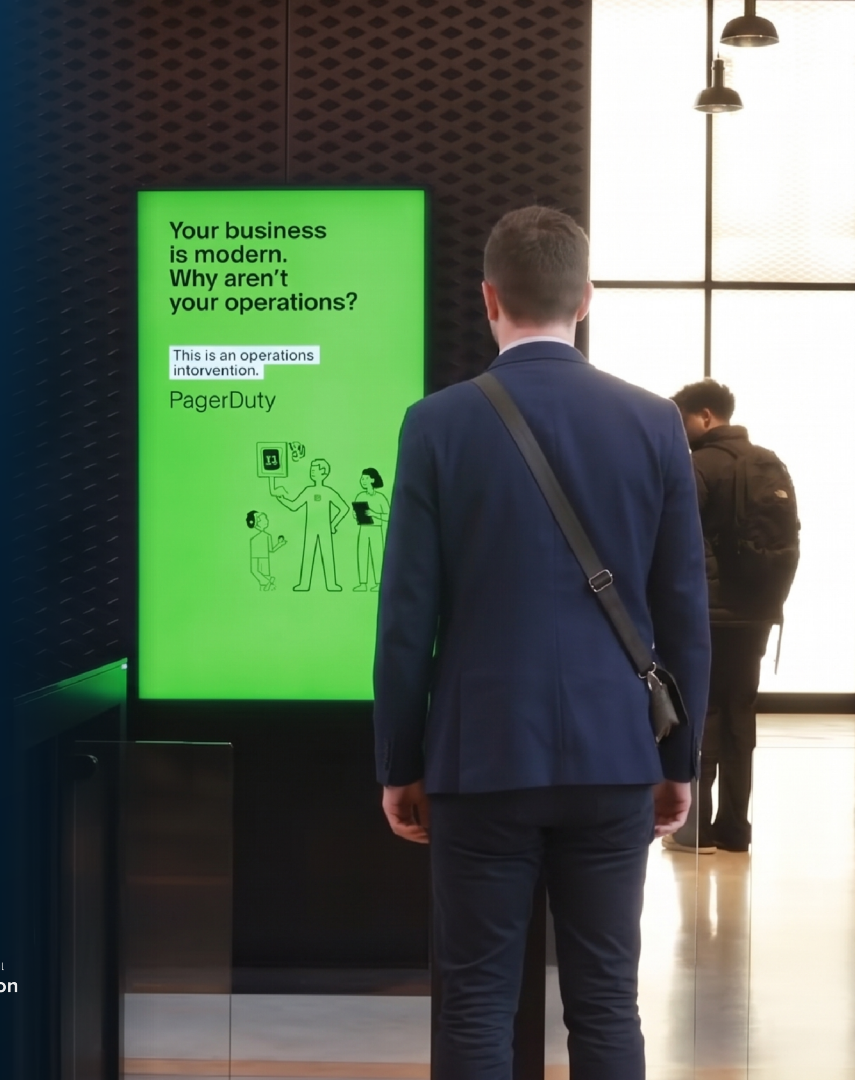
ECN

WHITE PAPER · 2026

THE BUSINESS CASE FOR OFFICE ATTENTION

What Lumen's research found, why it works, and what it means for out-of-home planning in 2027.



Research by LUMEN

Marketing campaign with financial climate contribution
ClimatePartner.com/16644-2110-1001

ABOUT THIS PAPER

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ECN commissioned Lumen Research to measure attention to advertising in office foyers. This paper sets out what they found, why we think it works, and what it means for planners.

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EXECUTIVE SUMMARY

Office DOOH is not standard DOOH.

Lumen's research found that the same size of screen earns very different attention depending on where it is. In the office, that attention turns into memory, and memory keeps building with every pass.

Lumen recruited 603 full-time office workers across three countries and benchmarked every result against its norms for standard DOOH, large format, social, display and online video. Every comparison was tested at 95% confidence.

3.4x	the attention of standard D6 DOOH: the same 2m² / 6-sheet screens in roadside, retail and transport.
125%	of the attention of large-format roadside (48 and 96-sheets), from a screen a fraction of the size.
44%	more brand recall than standard D6 DOOH.
5 sec	of cumulative attention, and ECN pulls ahead of digital at turning attention into memory.
70+	Happydemics brand lift studies show the same effect in live campaigns.

Source: Lumen Research, ECN Attention Study, 2026; Happydemics

INTRODUCTION

Size is a proxy. Attention is what you're buying.

The screen is the same size. The difference is the place.

For decades, out-of-home planning has followed a simple rule: if you want more attention, buy a bigger screen. Large-format roadside sites are the headline act of many campaigns, and for good reason. They are bold, public and built for fame.

But size is a proxy. What planners are really buying is attention, so we commissioned Lumen Research to measure it directly.

This paper sets out what Lumen found: how much attention office DOOH earns against the same-size screens elsewhere and against large format, whether that attention turns into memory, and how it compares with digital platforms.

It then explains why we think it works, what it means for each category's out-of-home playbook, and how to plan for attention in 2027.

01

CHAPTER 01

Why attention

Impressions tell you how many people could have seen an ad. Attention tells you who did, and whether it stayed with them.

The attention problem

Why ECN commissioned the study

How the study was run

THE ATTENTION PROBLEM

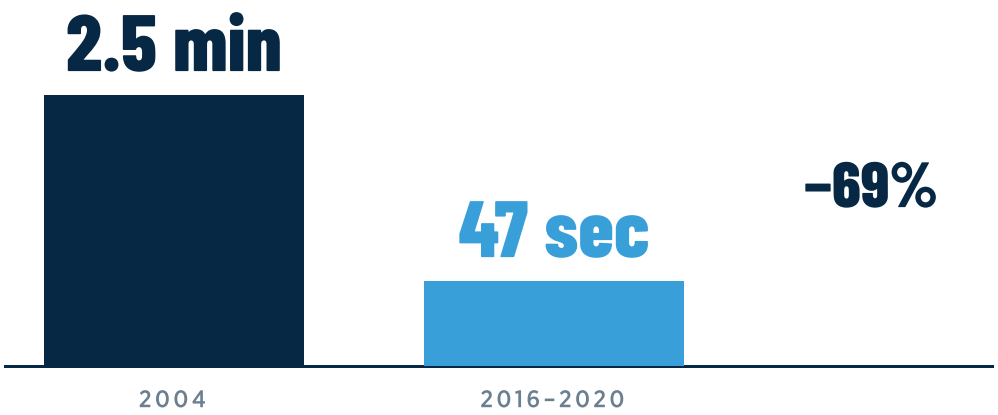
Attention is getting scarcer. Where it's earned matters more.

Psychologist Gloria Mark has measured how long people stay on one screen before switching. In 2004, the average was 150 seconds. In her studies from 2016 to 2020, it was 47 seconds: a fall of 69%.

The pressure is greatest at work. Microsoft's 2025 research finds employees are interrupted by an email, chat or meeting notification roughly every two minutes, and 48% describe their working day as chaotic and fragmented.

That changes the planning question. Not just how many people could see an ad, but where they have the focus to notice it, and the chance to see it again.

FIG. 1 · AVERAGE FOCUS ON ONE SCREEN BEFORE SWITCHING



AT WORK · MICROSOFT, 2025

2 min

Average gap between emails, chats and meeting pings

48%

Of employees say their working day feels chaotic and fragmented

Sources: Gloria Mark, Attention Span, 2023. Microsoft Work Trend Index, 2025.

WHY ECN COMMISSIONED THE STUDY

To measure attention, not just impressions.

Attention only has value if it turns into memory. So we asked Lumen to measure both.

Impressions count who could have seen it. Attention counts who did.

Impressions tell you how many people could have seen an ad. They don't tell you whether anyone looked, or whether the brand stayed with them. That gap is why attention has become one of the most important conversations in our industry.

We've always believed office foyers are a different kind of out-of-home environment: calm, familiar and part of the working day. Believing it isn't enough, so we commissioned Lumen Research, an attention research specialist, to put ECN to the test.

HOW THE STUDY WAS RUN

Real office workers. Real journeys to work.

Every result was benchmarked against Lumen's normative database, with every format tested the same way.

603
office workers

3
countries

3+
office days a week

95%
confidence

01 RECRUIT

Full-time office workers, in the office at least three days a week.

02 EXPOSE

First-person videos of a real commute into ECN buildings.

03 CONTROL

A matched group not shown ECN ads, to isolate brand recall.

04 BENCHMARK

Against Lumen norms for DOOH, large format, social, display and video.

Source: Lumen Research, ECN Attention Study, 2026

THE RESEARCHER'S VIEW

ECN's screens sit where office workers walk and wait every working day, so they earn more attention than large-format DOOH and better recall than your standard 6-sheet. As our cumulative attention research shows, brand outcomes come from building attention over time, and few environments build it as naturally as the daily commute through the office lobby.

Mike Follett
CEO, Lumen Research

02

CHAPTER 02

The attention gap

Same size of screen. Very different results. The difference is the place.

3.4x the attention of standard D6 DOOH

The busier the setting, the bigger the gap

125% of large-format attention

VS STANDARD D6 DOOH

Same screen size. The difference is the place.

3.4x

the attention of standard D6 DOOH: the same 2m² / 6-sheet format when it sits in roadside, retail and transport environments.

Impressions treat every 2m² screen as equal. Lumen's data shows they aren't. Streets and stations are crowded with messages, all competing for the same glance. A foyer usually has one or two screens, seen by a calm, familiar audience at the start of the working day.



Fig. 2 · Office workers approaching an ECN screen, Frankfurt

Source: Lumen Research, 2026

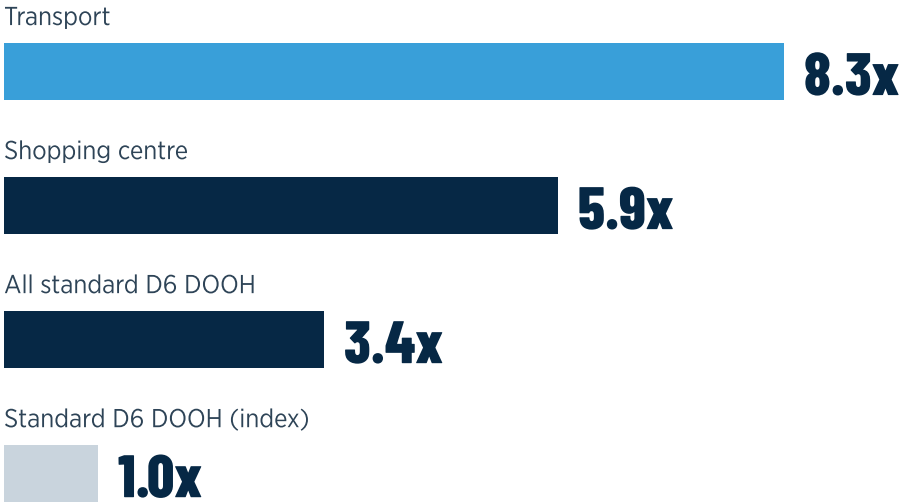
OFFICE DOOH VS THE SAME 2M² SCREENS

The busier the setting, the bigger the gap.

Against the same-size screens in transport environments, office DOOH earns 8.3x the attention. Against shopping centre screens, 5.9x.

The pattern is consistent: the more crowded and hurried the environment, the less attention a screen can hold. In a station, people are mid-journey and focused on getting somewhere. In the office, the journey is over.

FIG. 3 · ATTENTION, OFFICE DOOH VS SAME-SIZE SCREENS



Source: Lumen Research, 2026. Same 2m² screen size in every environment.

VS LARGE-FORMAT ROADSIDE

A fraction of the size. More attention.

That challenges one of the oldest assumptions in out-of-home planning: that a bigger screen buys you more attention. Context matters as much as square metres.

Large format remains one of the most powerful tools in out-of-home for public reach and fame. But a single roadside site reaches people occasionally. Office screens reach the same senior audience day in, day out, with 25% more attention.

FIG. 4 · SCREEN SIZE TO SCALE



Attention: 125% of large format.

Source: Lumen Research, 2026. Diagram drawn to scale.

03

CHAPTER 03

From attention to memory

Attention only has value if it turns into memory. In the office, the message has the chance to stick.

44% more brand recall

Proven in market with Happydemics

BRAND RECALL VS STANDARD D6 DOOH

Remembered, not just seen.

44%

more brand recall than standard D6 DOOH. Lumen compared office workers who saw ECN advertising with a matched control group who didn't.

A brand that's noticed but forgotten has bought very little. Recall is where attention starts to earn its keep: the bridge between seeing an ad and choosing a brand.



Fig. 5 · An office worker stops to read an ECN screen, London

Source: Lumen Research, 2026. Exposed vs matched control.

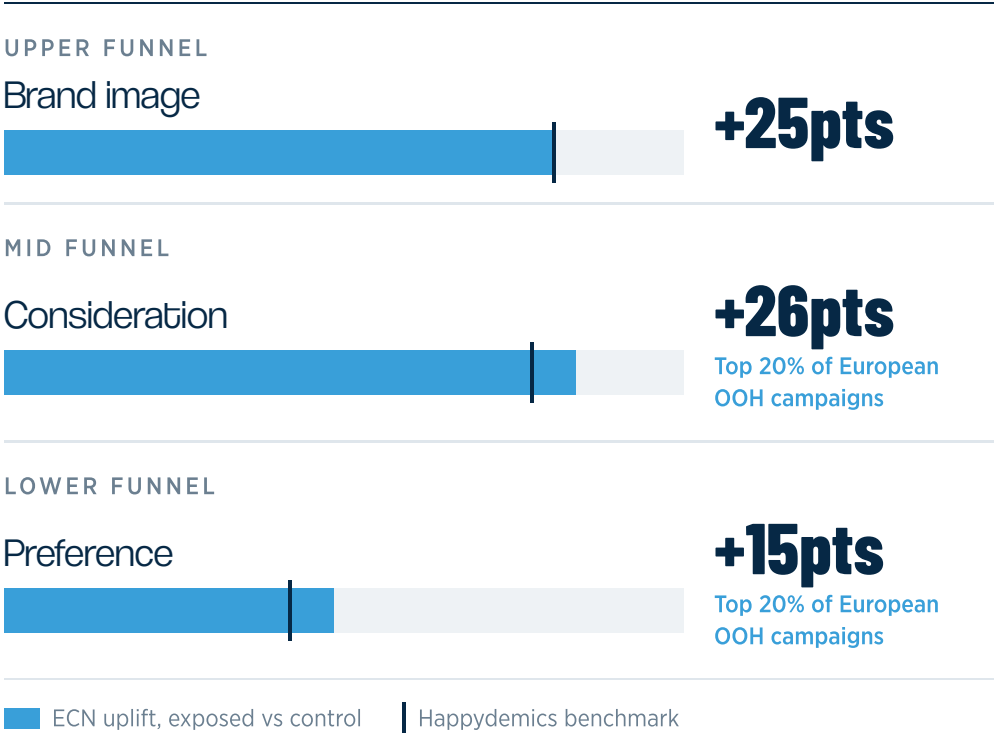
PROVEN IN MARKET

Lumen shows ECN ads are remembered. Happydemics shows they move brands.

Since we began measuring, ECN has run nearly 70 brand lift studies with Happydemics on live campaigns across the UK, France and Germany.

Each one measures a live ECN campaign among the real audience in our buildings, comparing people who saw the campaign with people who didn't. Two sources, two different methods, one consistent story: office attention turns into memory, and memory turns into brand outcomes.

FIG. 6 · ECN BRAND LIFT ACROSS THE FUNNEL



Source: Happydemics, ECN brand lift studies to 12 Oct 2026. Brand image n=58, consideration n=69, preference n=15.

04

CHAPTER 04

Why the office works

Lumen measured the result. Four things come together in the office foyer that rarely come together anywhere else.

Four reasons it works

The office mindset advantage

WHY THE OFFICE WORKS

Here's why we think it works.

Lumen measured the result. This is our reading of why. Streets and stations are crowded with messages and people in a hurry. The office foyer is calm, familiar and part of the working day, and four things come together there that rarely come together anywhere else.

01

Fewer competing ads

A foyer usually has one or two screens, and they're ours. Attention per screen rises where fewer screens compete for it.

02

Time to look

People wait for lifts, and the screen is right there. Attention is highest on longer walk-ups and close to where people wait.

03

Frequency, built in

The same people pass the same screens around four times a day, and 13 times a week.

04

The office mindset

The commute is behind them. People arrive more settled, more positive and more open to what's around them.

Source: Lumen Research, 2026; ECN

THE OFFICE MINDSET ADVANTAGE

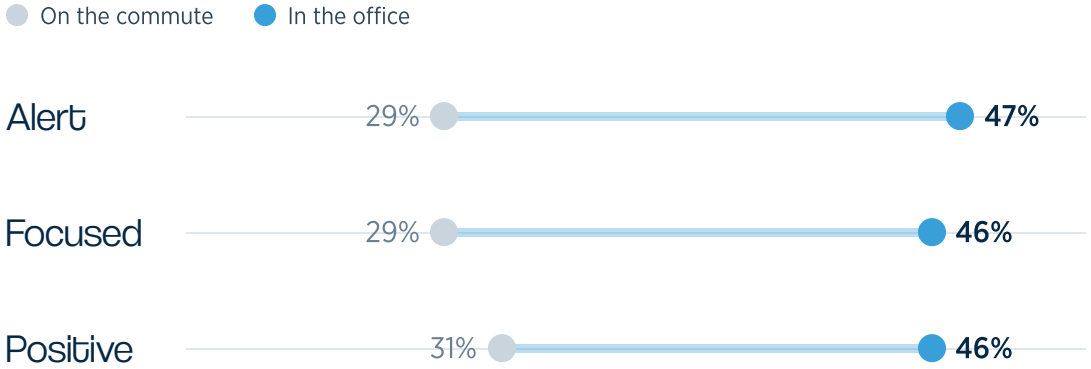
Same people. A better state of mind.

When the same people are asked how they feel on the commute and in the office, the office wins clearly.

Arriving at the office is a different moment from the commute that came before it. The crowded platform, the traffic and the delays are behind them. People walk into a familiar building, among colleagues they know, ready to start the day.

We believe this office mindset advantage explains part of the gap Lumen measured between office DOOH and standard D6 DOOH.

FIG. 7 · % WHO FEEL EACH WAY, COMMUTE VS OFFICE



Source: ECN Office Mindset Advantage research, UK, Oct 2024 (n=406 public-transport commuters)

05

CHAPTER 05

The habit effect

Office attendance is a habit. When your audience passes the same screens every working day, attention has the chance to become memory.

Frequency, built into the working day

Recency puts it to work

THE HABIT EFFECT

Frequency isn't something you chase. It's part of the routine.

Most media is built around a single moment: a scroll, a glance from a car, a pause on a platform. Brands pay again and again to recreate it. The office works differently. Lumen found that once 5 seconds of cumulative attention is passed, ECN pulls ahead of digital, and recall keeps rising from there.

FIG. 8 · A WORKING DAY PAST THE SAME SCREENS



4x
a day

13x
a week

5 sec
and ECN pulls ahead of digital

Source: Lumen Research, 2026; ECN. Times shown are illustrative.

WHY FREQUENCY IS DIFFERENT

High frequency is hard to build in most media.

The brands that win in the office are the ones that stay there.

On many digital platforms, feeds are fragmented, ads are skipped and every extra exposure costs more. Much of out-of-home has the same problem in a different form.

People don't go to the airport, the shopping centre or the gym several times a week, so the same person rarely sees the same screen often.

People do go to the office. The same senior audience passes the same screens several times a day, several days a week.

Beyond 5 seconds, memory keeps building: Lumen's data shows recall rising as attention grows. So the brands that win are those building frequency week after week, not those that stop at the threshold.

Source: Lumen Research, 2026; ECN

06

CHAPTER 06

Rethinking the playbook

Every category has its out-of-home habits. New attention research suggests office DOOH can make every one of those plans work harder.

Automotive

Entertainment

Tech and B2B

Travel

TABLE 1 · THE CATEGORY NORM, AND THE ECN RETHINK

CATEGORY	THE NORM	THE ECN RETHINK
Automotive	Large-format roadside, for fame and drivers.	ECN gives you big-screen attention in full-motion video, which roadside digital can't run, reaching the people who buy premium cars and set fleet policy.
Entertainment	Large format for fame, then commuter formats on the way home.	Reach them on ECN when they're focused: 8.3x the attention of transport screens. The office is where the watercooler conversation starts.
Tech and B2B	Airport billboards for decision-makers.	87% of UK airport passengers travel for leisure. ECN reaches buying committees in the office, where purchase decisions are made.
Travel	Airports and large format, once the trip is booked.	Get in before the booking. Business trips are planned in the office, by professionals who pass ECN screens every day.

ECN point of view on the Lumen results; categories not measured separately. Airports: UK CAA, 2024.

SHOULD OFFICE DOOH REPLACE LARGE FORMAT?

No. It works alongside it.

Large format builds fame. Office DOOH builds the frequency that turns it into memory.

Large format remains one of the most powerful tools in out-of-home for public reach and fame. But a single roadside or airport site reaches people occasionally.

Office screens reach the same senior audience day in, day out, with 125% of the attention of large format.

Our point is simpler. If the job is attention from senior decision-makers, the office foyer delivers it beyond large-format levels, from a screen a fraction of the size, in front of the people inside the Companies you want to reach.

And unlike roadside digital, office screens run full-motion video, so creative can be seen the way it was made.

07

CHAPTER 07

What it means for planners

Plan for attention, not just impressions. Use office DOOH alongside large format, and build frequency in.

Six planning principles

Three questions to ask your agency

01 Plan for attention

Two screens of the same size can deliver very different results depending on where they are.

02 Work alongside large format

Large format builds fame. Office DOOH builds the frequency that turns it into memory.

03 Build beyond 5 seconds

Treat 5 seconds as the starting line, and build weight so attention keeps growing.

04 Think in weeks

Run across several working weeks and let the routine do the work.

05 Keep creative fresh

A planned creative sequence can tell a story to the same people over time.

06 Show the brand early

Make it easy to recognise from the first frame, every time.

ASK YOUR AGENCY

Are we buying screen size, or attention?

Where does our audience spend focused, routine time?

Can our plan run full-motion video where it matters most?

NOTES

Sources and definitions

1 Lumen Research, ECN Attention Study, 2026. 603 full-time office workers across three countries; every comparison significance tested at 95% confidence. Benchmarked against Lumen norms for out-of-home, social, display and online video.

2 Definitions. Standard D6 DOOH = 2m² digital 6-sheet screens in roadside, retail and transport environments. Large format = roadside 48 and 96-sheet.

3 Office mindset. ECN Office Mindset Advantage research, UK, October 2024 (n=406 office workers who commute by public transport, measured on the commute and in the office).

4 Happydemics. 70+ ECN brand lift studies in the UK, France and Germany, compared with European OOH studies on the Happydemics platform.

5 Recency. Cebr / Opinium for ECN, London Office Professionals Consumer Spending study, 2025; ECN/MTM Study 2025.

6 Airport passengers. UK Civil Aviation Authority Departing Passenger Survey, 2024. Category views are ECN's point of view, built on the Lumen results.

7 Attention spans. Gloria Mark, Attention Span: Finding Focus for a Fulfilling Life, 2023. See also Johann Hari, Stolen Focus, 2022.

ECN

Attention that's remembered is attention that works.

See the full Lumen findings, and which of your target accounts are in our buildings.

Book the research walkthrough

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