# Multi Touch Attribution Marketer Survey
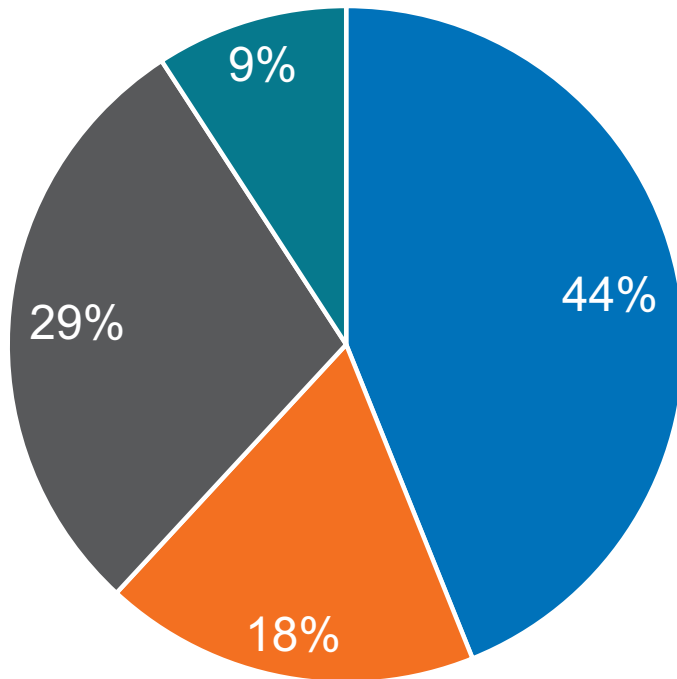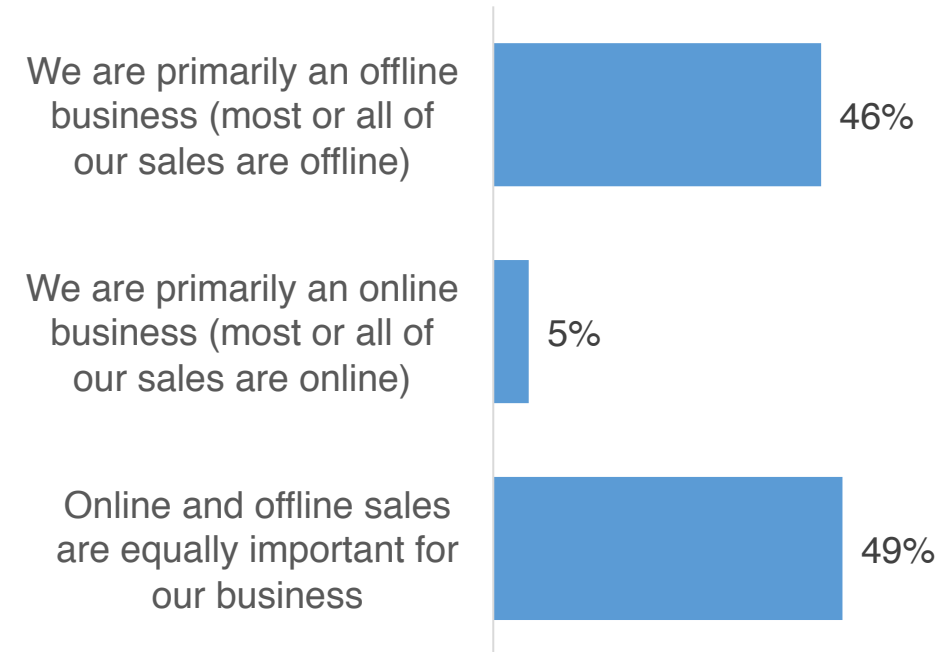
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# Sample profile and extent

## 5 out of 10 respondents manage these studies, while 4 our of 10 are end users



- 44% — I am the end user of the results of such studies
- 18% — I am personally involved with the technical side / analyses
- 29% — I help manage such studies
- 9% — None of the above: I have no involvement with marketing productivity assessment analyses

Which of the following statements best describes your role and involvement when it comes to using various methods (e.g. Marketing/Media Mix Modeling, Attribution, or other methods) to assess the productivity of your marketing initiatives, N=132 Total Sample

## Mix between offline online and online/offline companies



- We are primarily an offline business (most or all of our sales are offline) — 46%
- We are primarily an online business (most or all of our sales are online) — 5%
- Online and offline sales are equally important for our business — 49%

# State of MTA – Key Findings

**1** — Selecting and onboarding an MTA provider is a long process, about a year from initial RFP.

**2** — Non Users of MTA have a lot higher expectations in terms of the scope and depth of how MTA will be applied in their organization

**3** — Non users also have a lot higher expectation about the impact of MTA on marketing ROI

**4** — Marketers pay/expect to pay up to $500K a year for MTA, but two thirds are not sure if MTA "pays for itself"

**5** — Proving lift is the most critical priority for marketers. Walled gardens, standardization of IDs and mobile readiness are lesser priorities

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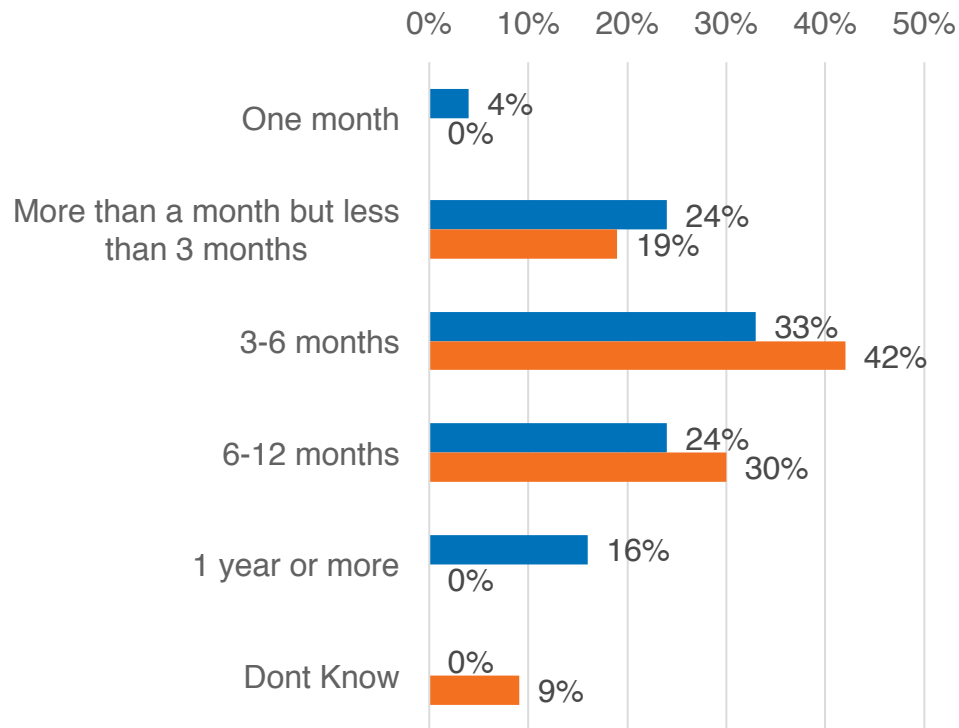
This is the wave of the future, jump on and ride it:

**50%**

Could be good for you if it doesn't kill you first

**41%**

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# It takes about a year to select and onboard an MTA provider

Users and non users agree that it takes at least 6 months to select an MTA provider



How long did it take you /do you think it will take you to to select your current MTA solution (from the date you started the RFP process until the date you had a signed contract)? Total N=94

Uses and non users agree that it takes at least 6 months to onboard an MTA provider
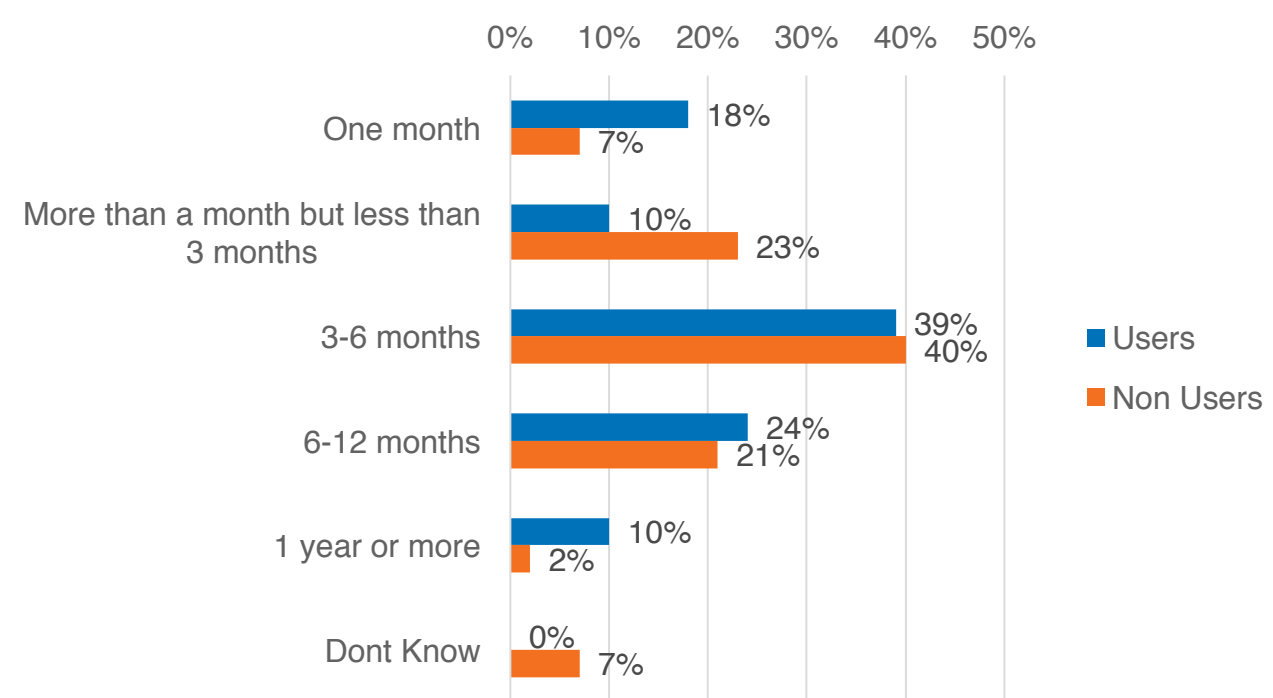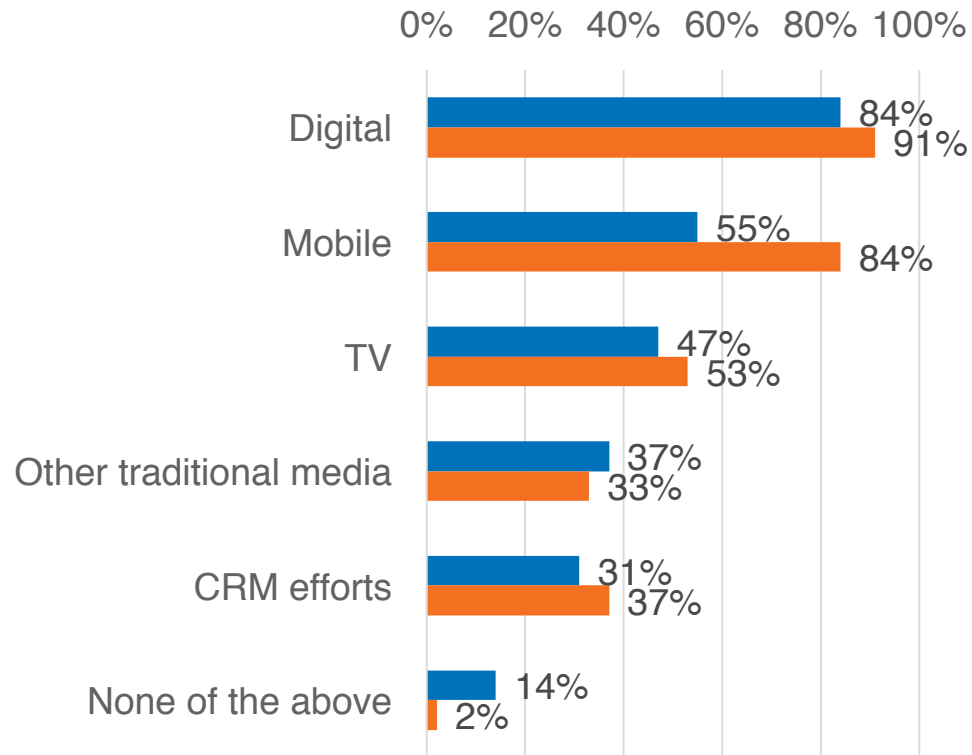


How long did it take you /do you think it will take you to to onboard your current MTA solution (from the date you signed the contract)? Total N=94

# Non Users of MTA have a lot higher expectations in terms of the scope and depth of how MTA will be applied in their organization

Non Users expect to be able to measure a lot more media, including mobile

Non Users expect to be able to measure the majority of their spend



**Left chart — by media type:**

| Media | Users | Non Users |
|---|---|---|
| Digital | 84% | 91% |
| Mobile | 55% | 84% |
| TV | 47% | 53% |
| Other traditional media | 37% | 33% |
| CRM efforts | 31% | 37% |
| None of the above | 14% | 2% |

**Right chart — by share of spend:**

| Share | Users | Non Users |
|---|---|---|
| Less than 10% | 31% | 5% |
| 10%-30% | 22% | 16% |
| 30%-50% | 22% | 28% |
| 50% to 70% | 8% | 30% |
| 70% to 100% | 18% | 12% |
| Dont Know | 0% | 9% |

Does your MTA solution measure campaign ROI for any of the following parts of your marketing efforts? Please check all that apply. Total N=94
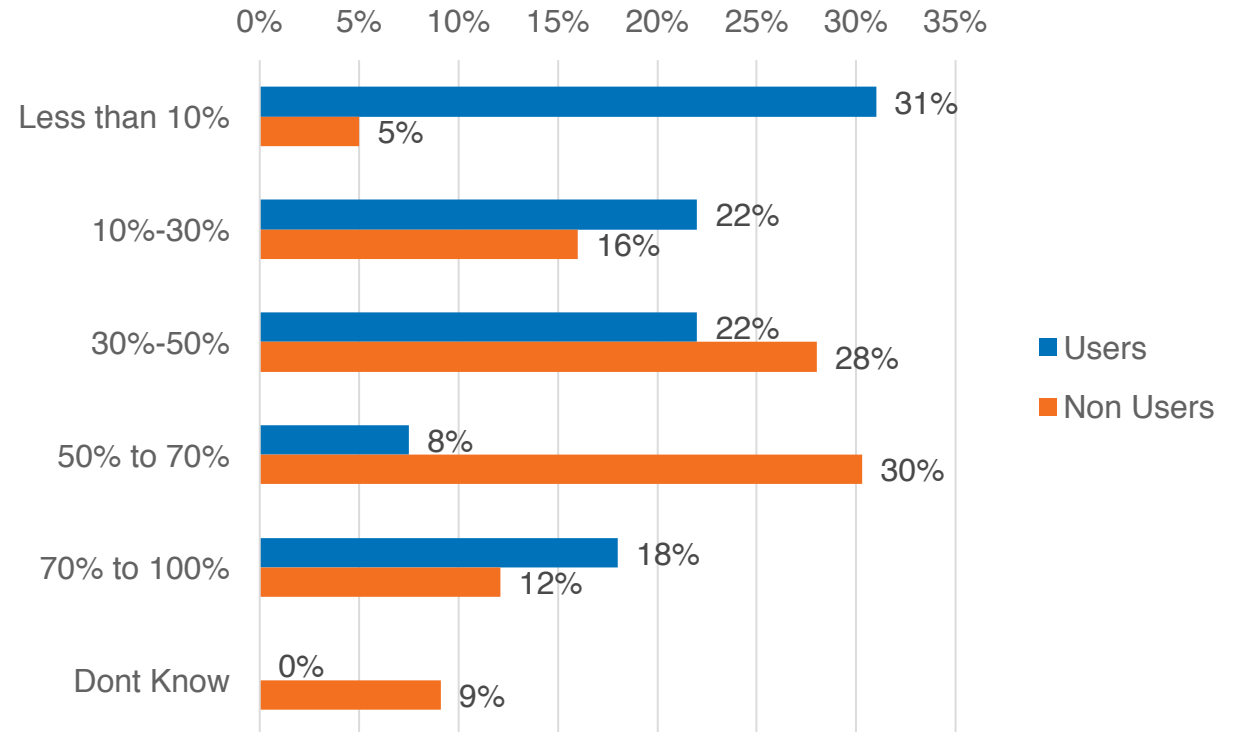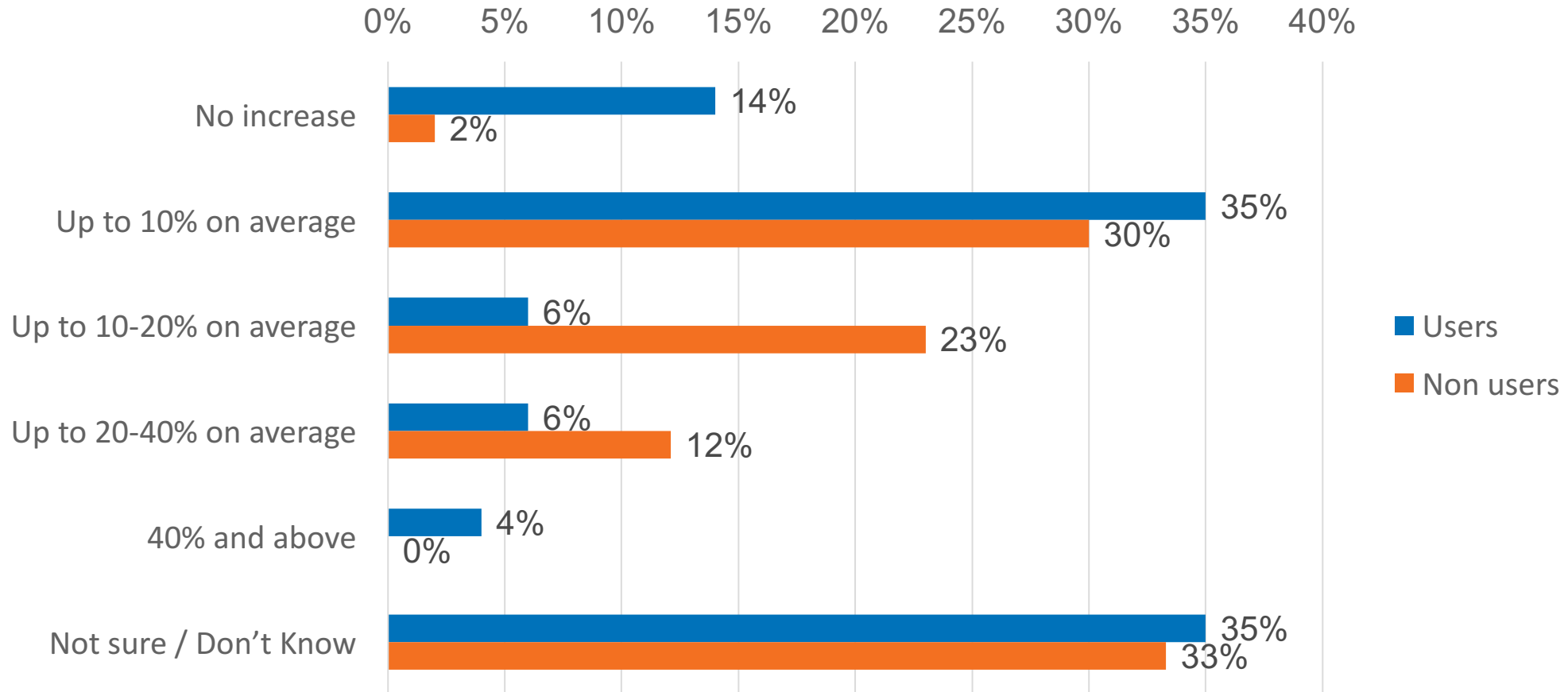
What share of your total marketing budget (including advertising) did you assess roughly speaking in 2016, using a Multi Touch Attribution solution? (Please consider whether you use MTA for all or just some of your marketing activities and channels) Total N=94

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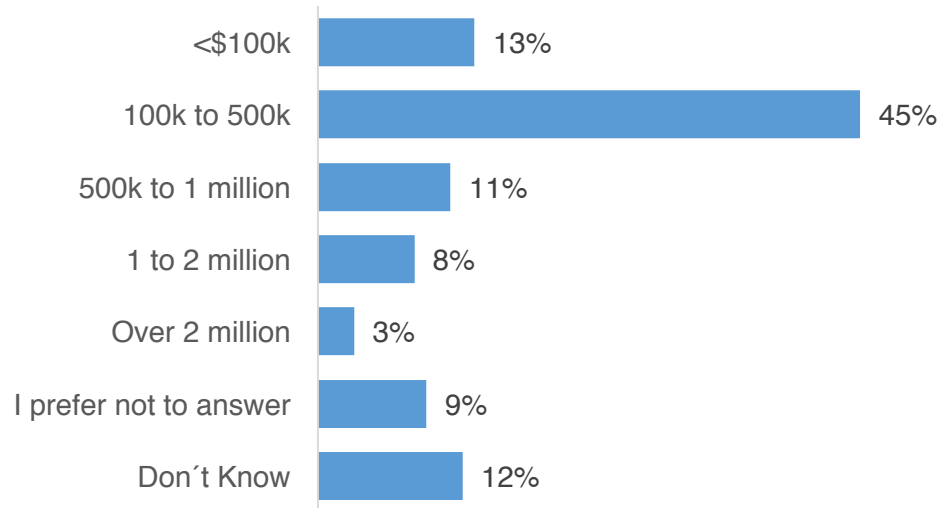# Non users have a lot higher expectation about the impact of MTA on marketing ROI



For the part of the budget where you will use MTA, what do you expect will be the impact on the marketing ROI as a result of using MTA? Total, N=94
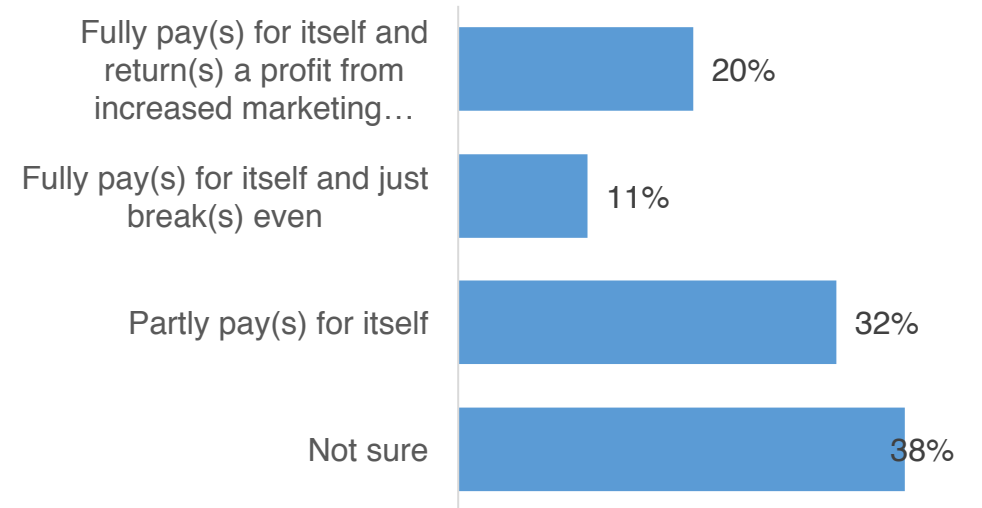
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# Marketers pay/expect to pay up to $500K a year for MTA, but seven our of ten are not convinced that MTA "pays for itself"

## 6 our of 10 marketers expect to pay up to $500K

| | |
|---|---|
| <$100k | 13% |
| 100k to 500k | 45% |
| 500k to 1 million | 11% |
| 1 to 2 million | 8% |
| Over 2 million | 3% |
| I prefer not to answer | 9% |
| Don´t Know | 12% |

## Seven out of ten marketers are not convinced that MTA fully Pays for itself

| | |
|---|---|
| Fully pay(s) for itself and return(s) a profit from increased marketing… | 20% |
| Fully pay(s) for itself and just break(s) even | 11% |
| Partly pay(s) for itself | 32% |
| Not sure | 38% |

What do you estimate the out of pocket costs were for your organization's MTA services in 2016? If you didn't use MTA in 2016 but plan to use it in the future, what do you estimate the out of pocket costs for your organization's MTA services will be for a full year? Total N=76

Would you say the MTA solution you currently use, pays for itself? If you don't currently use MTA, do you expect the MTA solution you will implement, will pay for itself by end of Year 1? Total N=76

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# Learnings so far: Not everyone is convinced

**"ROI from last click is dramatically different when compared with MTA"**

- *"Year one was a learning experience for us and we saw excellent results."*
- *"The longer we've worked with our provider and the more we understand their capabilities, the more we're able to leverage their expertise to drive improvement."*

**"Promise is amazing. Actuality is much less so"**

- "It takes time to implement and educate the organization"
- "Dedicated people, patience, took 3 years to have models where we needed now integral part of process"
- "It's highly complex. Moreso than most people think."

*If you have implemented MTA or are currently in-process, what are your key lessons learned so far?*

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**"Data, data, data!"**

- "Make sure you have access to your data and your partners are willing to share transparently"
- "Garbage in = Garbage out"
- "Data reliability is a challenge. There are so many players that touch the data before it ever gets to the MTA provider, and many of them are only somewhat familiar with the data."

**"Avoid subjectivity and black magic".**

- Get into the weeds with your partner. Make sure you understand the nuances of the methodology.
- Just a lot of information and need to find a trusted partner.
- Need to break down "black box" of methodology; difficult to get full organizational alignment, but key.
- External solutions are over designed, overly complicated black boxes that prevent organizational learning.
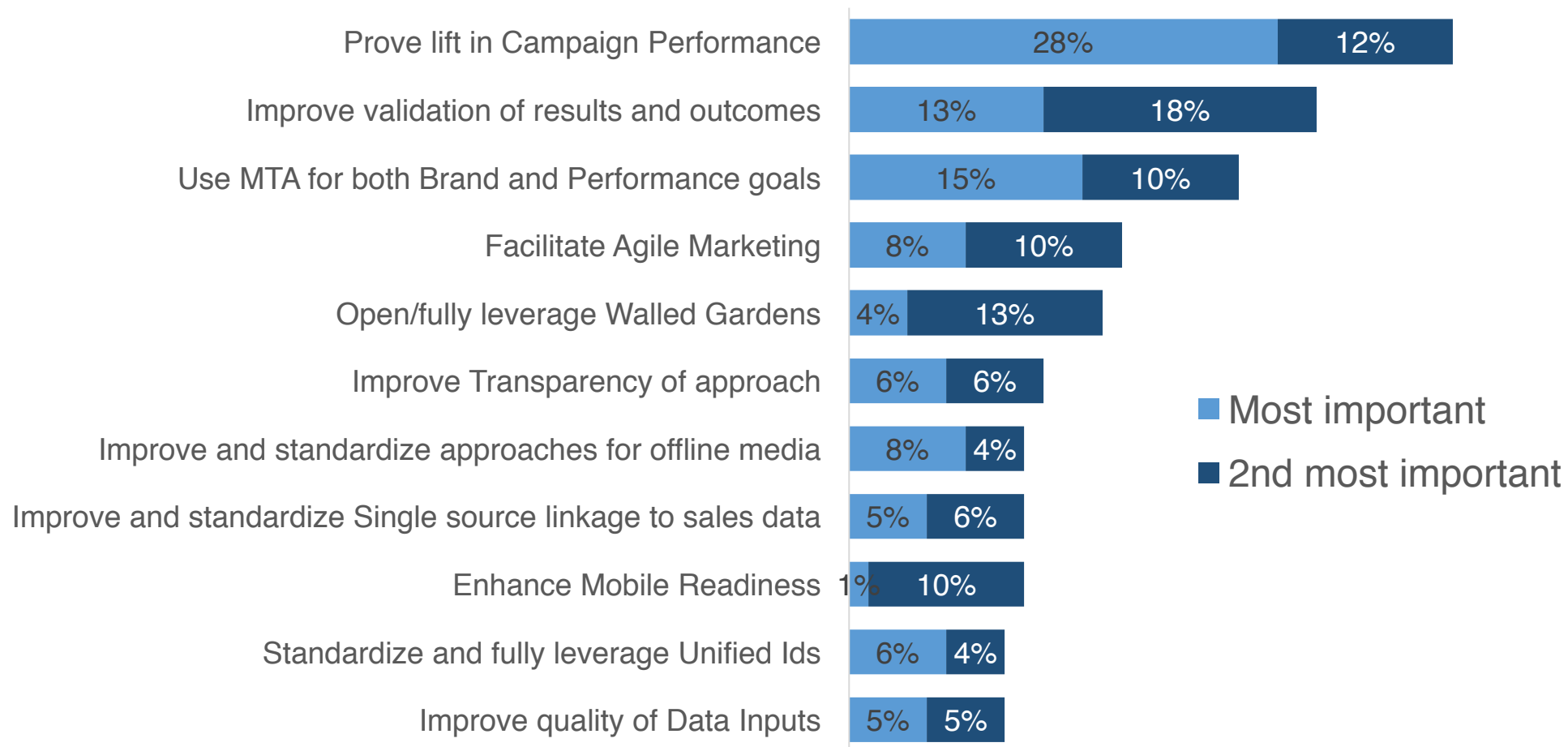
**"Great insights... difficult to get "the business" to act on the findings, thus ROI is low."**

- *Silo'ed attribution is better than nothing, but limited if you can't include offline marketing*
- *Clearly outline to outside stakeholders the length of on-boarding and when you'll see first read-outs*
- *Ensure inclusion of all factors impacting sales*
- *Need to appropriately scale agency and internal resources to be very actively involved before, during, and after deployment.*

*If you have implemented MTA or are currently in-process, what are your key lessons learned so far?*

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# Proving lift and improve validation are the most critical priorities



Prove lift in Campaign Performance — 28% / 12%
Improve validation of results and outcomes — 13% / 18%
Use MTA for both Brand and Performance goals — 15% / 10%
Facilitate Agile Marketing — 8% / 10%
Open/fully leverage Walled Gardens — 4% / 13%
Improve Transparency of approach — 6% / 6%
Improve and standardize approaches for offline media — 8% / 4%
Improve and standardize Single source linkage to sales data — 5% / 6%
Enhance Mobile Readiness — 1% / 10%
Standardize and fully leverage Unified Ids — 6% / 4%
Improve quality of Data Inputs — 5% / 5%

■ Most important
■ 2nd most important

Below is a list of areas that marketers have identified as important priorities to improve the value they receive from MTA solutions. Which of these priorities would make MTA more valuable to you and your organization. Please rank the top 5 with 1 being most important. Total Sample N=78

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# Thank You!
## Seizing the Mobile Opportunity

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**Mobile Marketing Association**

Here to lead the greatest transformation in marketing we'll see in our generation

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