

Multi Touch Attribution Marketer Survey

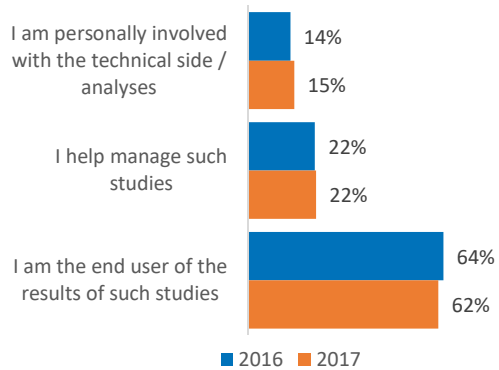
November 2017



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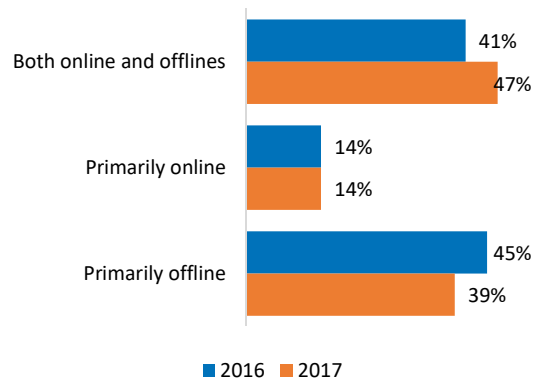
Sample profile and extent

More than 5 out of 10 respondents are end users of marketing productivity studies, while the rest are also involved in the process



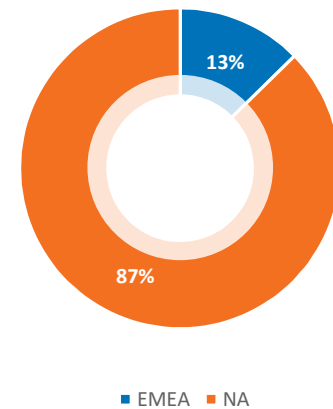
Which of the following statements best describes your role and involvement when it comes to using various methods (e.g. Marketing/Media Mix Modeling, Attribution, or other methods) to assess the productivity of your marketing initiatives, N=458 (2017) N=514 (2016) Total Sample

Majority of businesses were either offline only on both online and offline



For classification purposes, which of the following best describe the nature of your business?

Interviews were conducted in NA and EMEA



Geographical distribution, N=412, Effective Sample

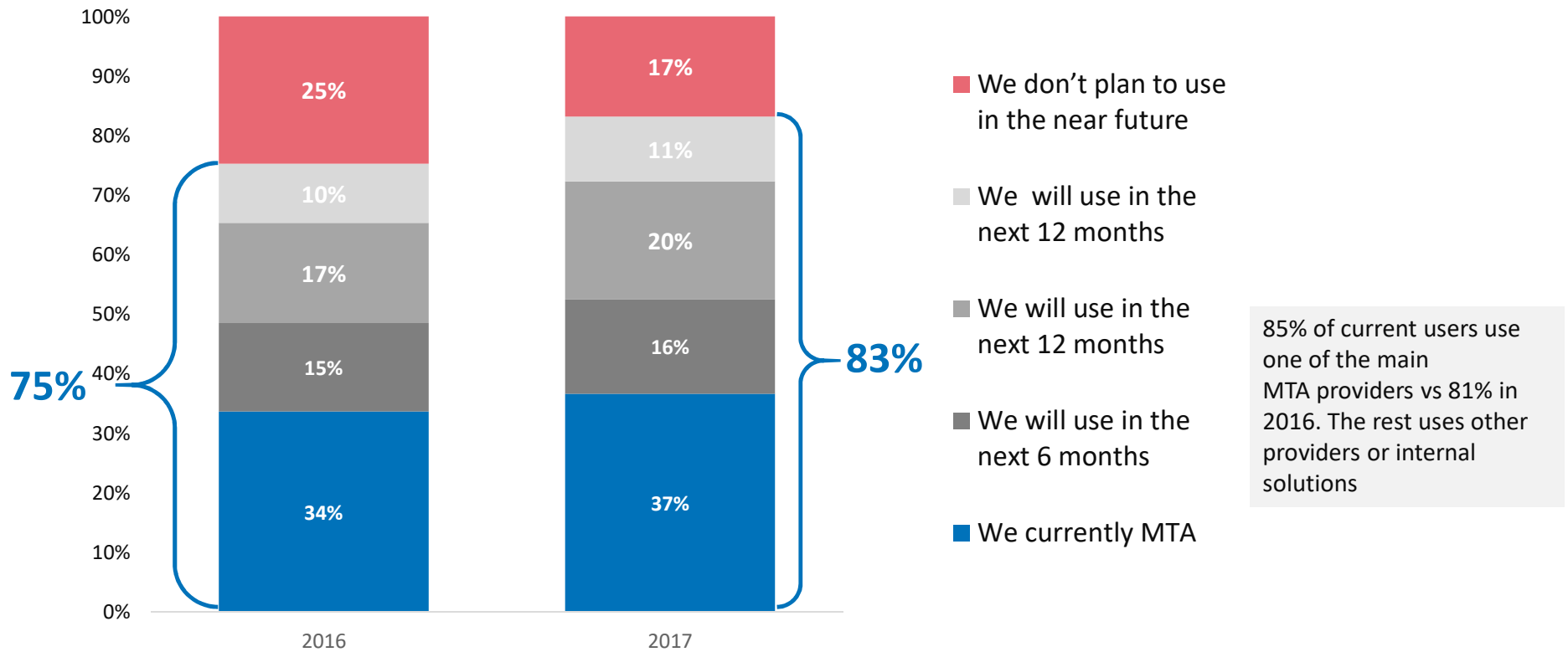


State of MTA – Key Findings

- 1 The promise of MTA has strengthened since 2016, with 83% of marketers using or considering an MTA solution (vs 75%). Yet, actual adoption is fairly stable (37% vs 34%)
- 2 The average NPS has remained unchanged since last year (-31 vs -29), showing that challenges remain with MTA application.
- 3 Marketers are still selective about where they use MTA and are less convinced about its impact compared to 2016. Yet, non users still have higher expectations about MTA usage and impact on ROI
- 4 Walled Gardens, data completeness and inconsistency of MTA/MMM results are marketers' key challenges.
- 5 6 out of 10 marketers have a DMP, but half of them use unified IDs

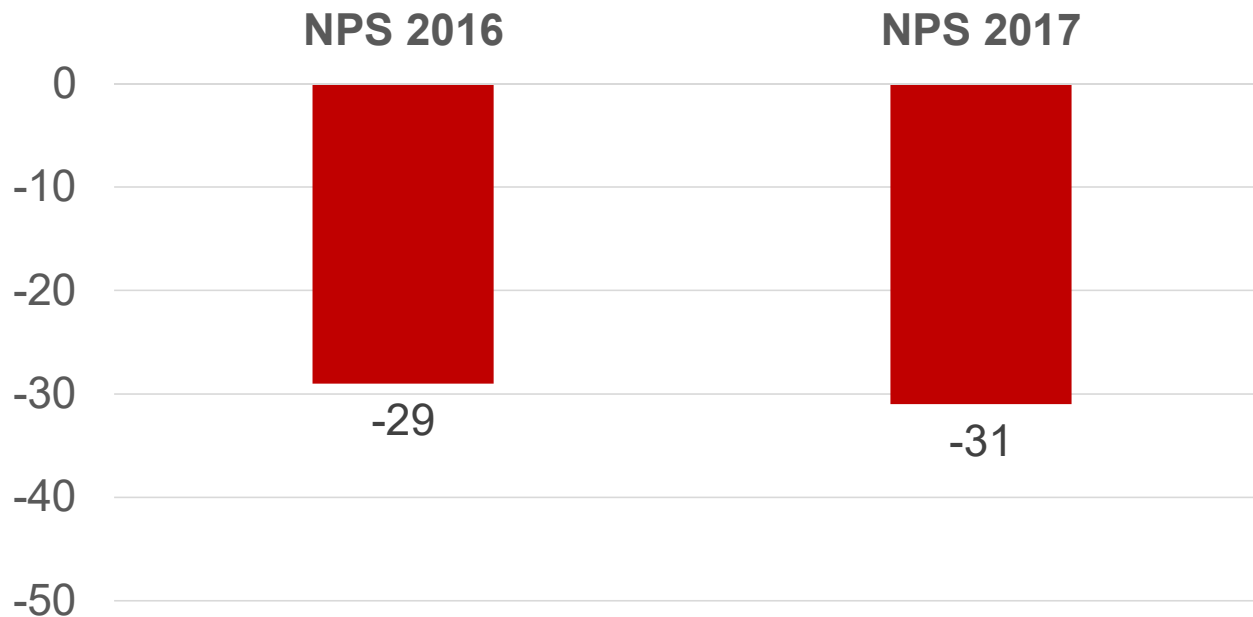


Promise of MTA strengthening since 2016. Adoption not so much.



Does your company currently use a multi touch attribution (MTA) solution or do you plan to use one in the future? N=343 (2017) N=412 (2016), Total Sample

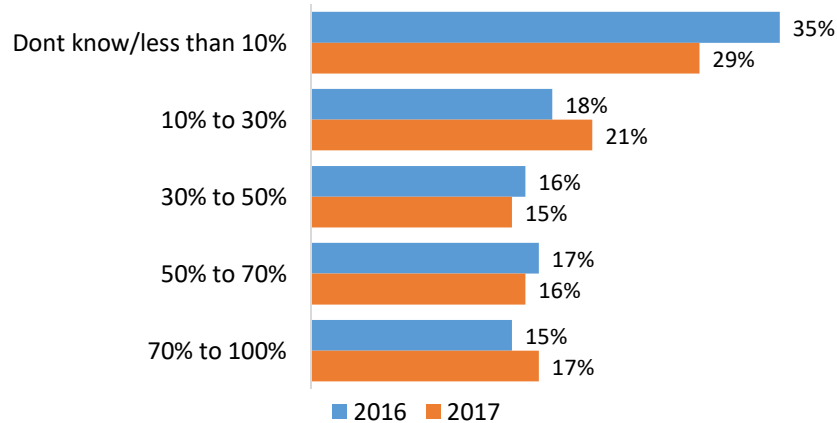
||| The average NPS has remained unchanged since last year



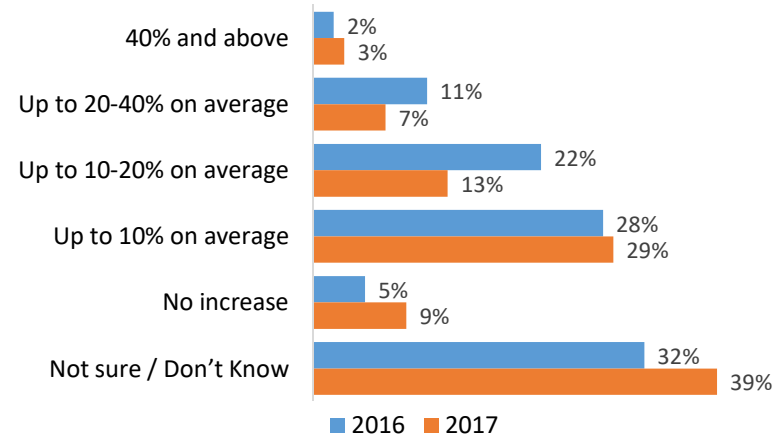
Overall how likely is it you would recommend your main multi touch attribution (MTA) provider?
N=113 (2017), N=118 (2016), Total MTA users

Marketers are still selective about where they use MTA and are less convinced about its impact compared to last year.

Majority of marketers use MTA selectively, not across all their budget (% of spend measured)



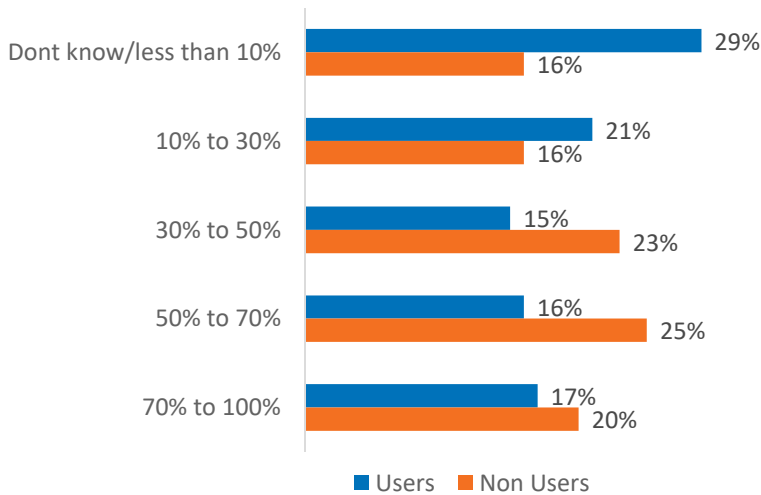
Fewer marketers think their MTA solution drives some incremental results/ROI



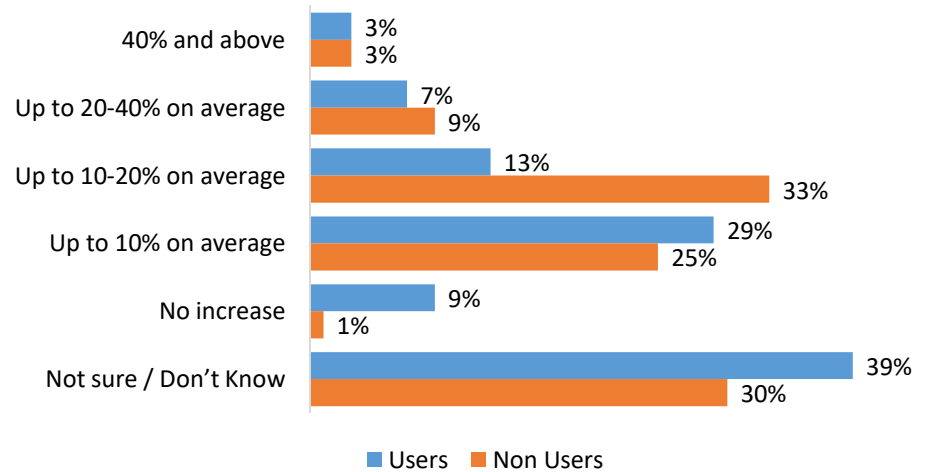
What share of your total marketing budget (including advertising) do you assess roughly speaking, using a Multi Touch attribution solution? (Please consider whether you use MTA for all or just some of your marketing activities and channels)
 Based on your experience, what do you think is the average impact/lift of using your MTA solution on the total ROI of your marketing activities?
 N= 98 (2017) N=107 (2016)

Non users have higher expectations about MTA usage and impact on ROI

Non users are still more optimistic in terms of the **SCOPE** of using MTA in their marketing (% of spend measured)



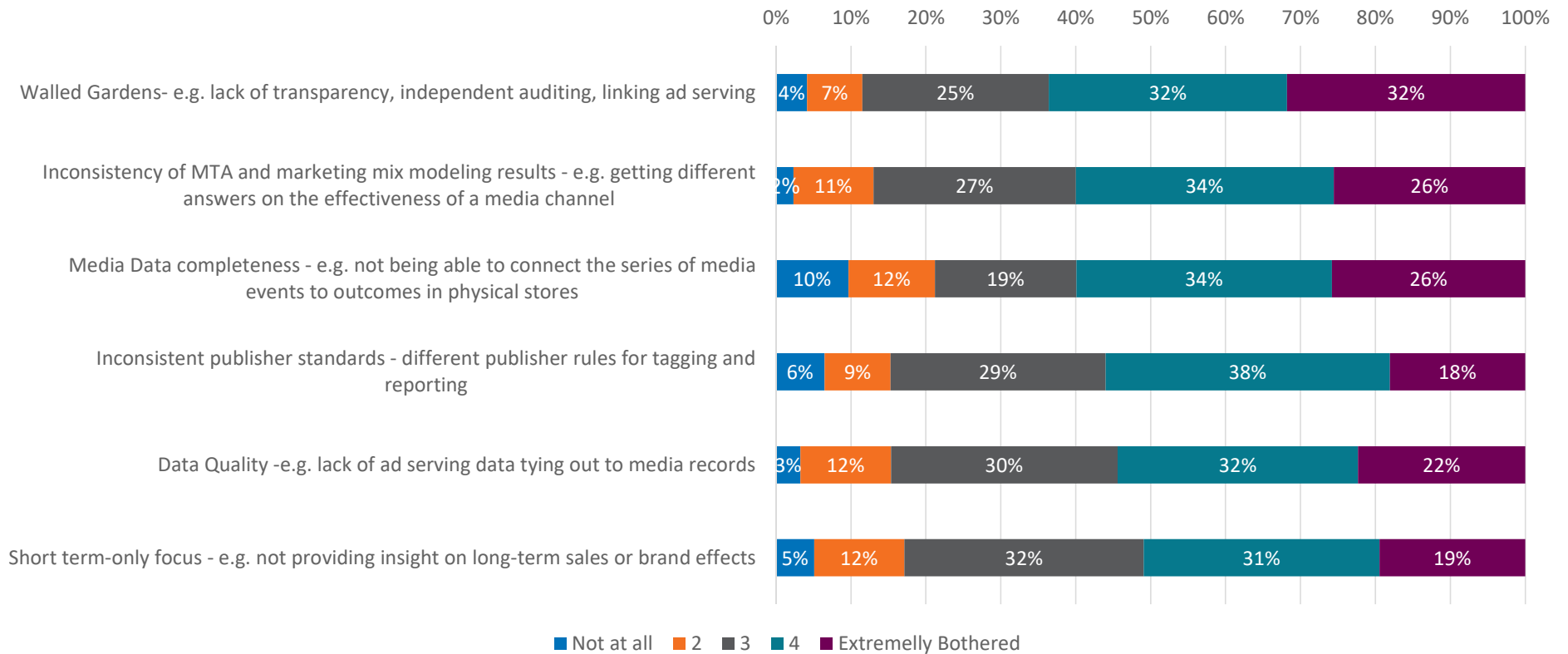
Non users are also more optimistic about the expected **IMPACT** of MTA in their marketing ROI



On average, what percent of your total marketing spending would you want to be able to evaluate using MTA after a year of onboarding an MTA solution? (Please consider whether you will use MTA for all or just some of your marketing activities and channels) N=148 (2017)

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? N=148 (2017)

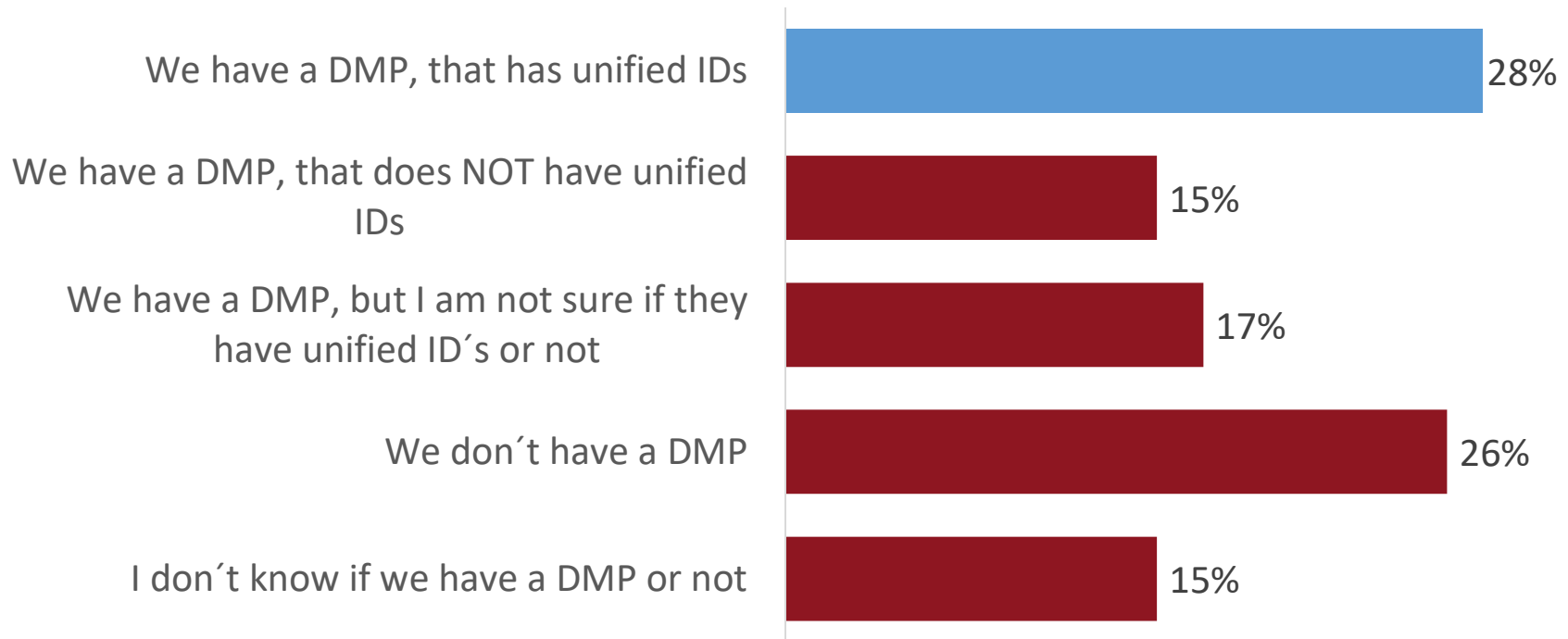
Walled Gardens, data completeness and inconsistency of MTA/MMM results are marketers' key challenges



How bothered are you by each of the following in terms of successfully deploying MTA in your organization? N=217



6 out of 10 marketers have a DMP, but half of them use unified IDs



Do you have a Data Management Platform (DMP) and if yes, does it have unified IDs? N=217



Walled Garden Challenges: Lack of trust, comparability and data integration

Lack of transparency; general mistrust of the partners

- It's often hard to know how much **faith** to put in the data presented to me and to get a clear action plan as a result. I get a lot of "This worked." or "This worked better than the other one", but often times the results seem incomplete and even seem to be affected by confirmation bias.
- Lack of **3rd party verification** for some publishers like FB
- **Transparency** into their process of obtaining and evaluating the data.

Walled gardens represent a large % of our spend, and we don't have visibility to the underlying drivers which would enable us to optimize.

- Not being able to **compare results across platforms** and see the **data holistically**.
- As a manufacturer, walled garden **limits our access to individual level sales data**, its use and ability to connect that to other data sources.
- It seems like each platform has their own version of an 'interaction' **which can be hard to compare** in a MTA world. Facebook interactions vs YouTube view vs search click.

Thank You!

Seizing the Mobile Opportunity



Mobile Marketing Association

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

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