

# State of MTA Marketer Benchmark Survey

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# ||| Three important questions

1

**What is the state of MTA in 2021?**

2

**What can we learn from MTA adopters? How do they use MTA and what challenges do they face?**

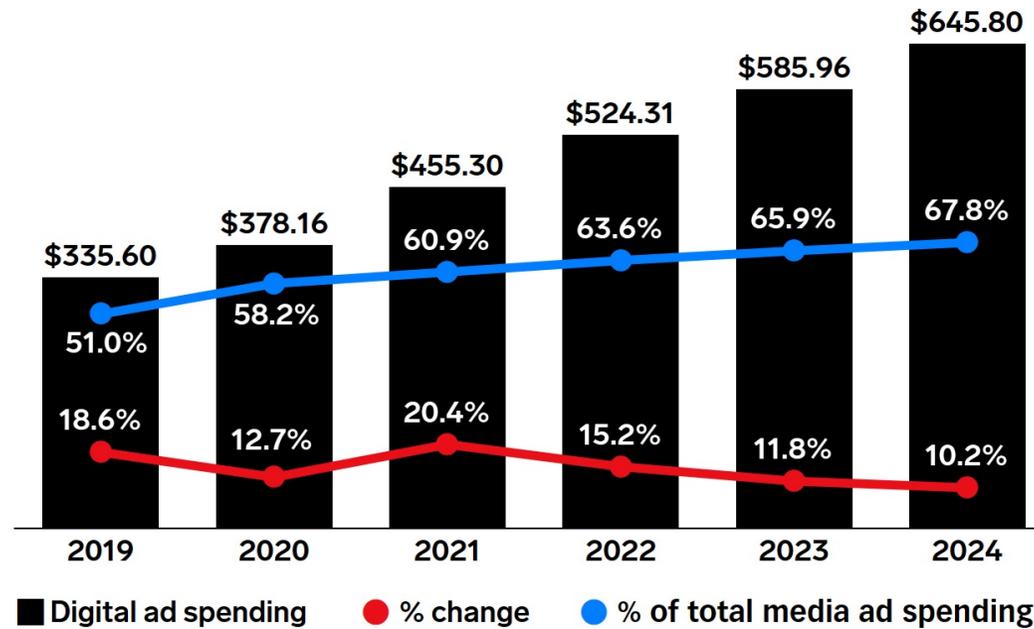
3

**What are the stages to MTA adoption and what roadblocks delay the process?**

2020

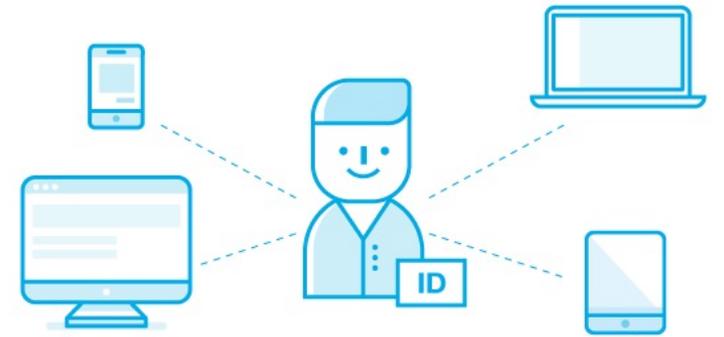
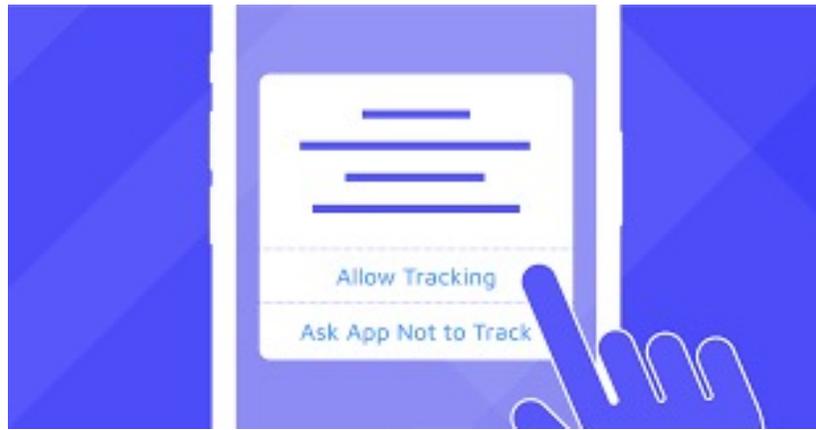
## Digital Ad Spending Worldwide, 2019-2024

billions, % change, and % of total media ad spending



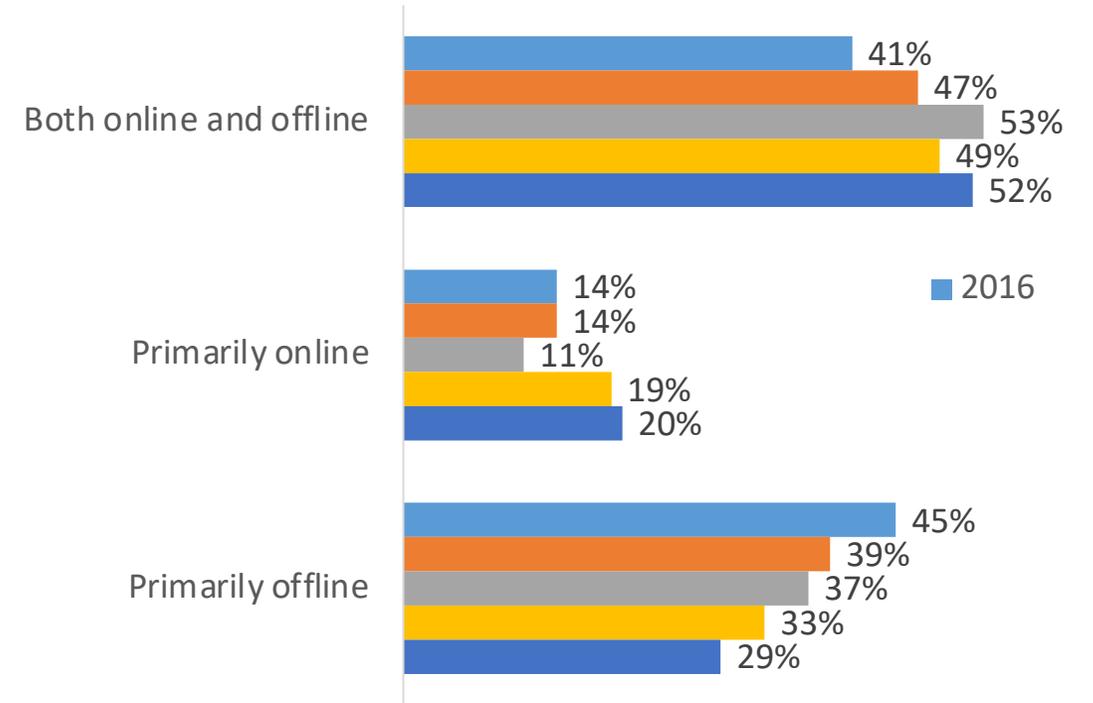
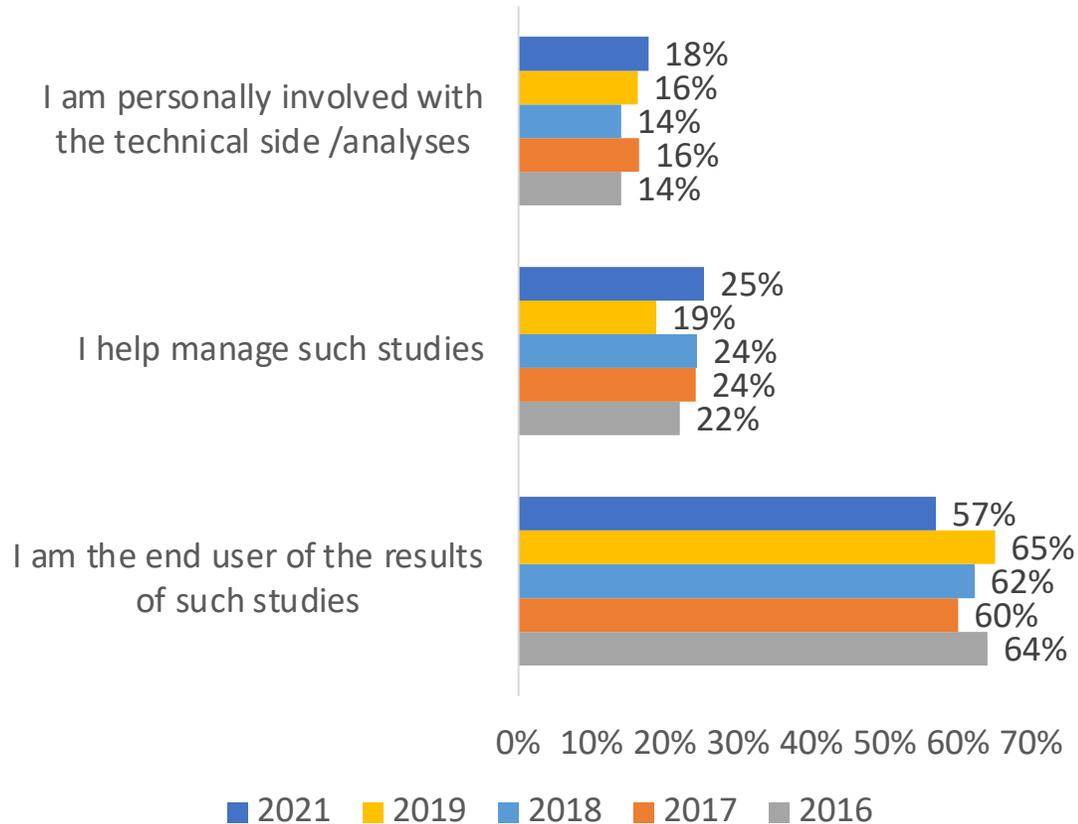
*Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms; excludes SMS, MMS, and P2P messaging-based advertising*

*Source: eMarketer, March 2021*



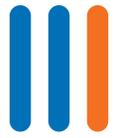


# Our sample includes “users” and “doers”, online and offline.



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?

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



# The companies we surveyed use a variety of media planning approaches



REACH

26%

We aim to **maximize reach** in the most cost effective way

13%

We aim for **reach first and then apply targeting selectively** in certain tactics

16%

We **don't have a typical approach.** Every campaign is different.

43%

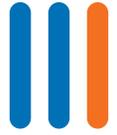
We use an **"outcomes based approach"**, focusing on media tactics or segments that have higher ROAS



OUTCOMES

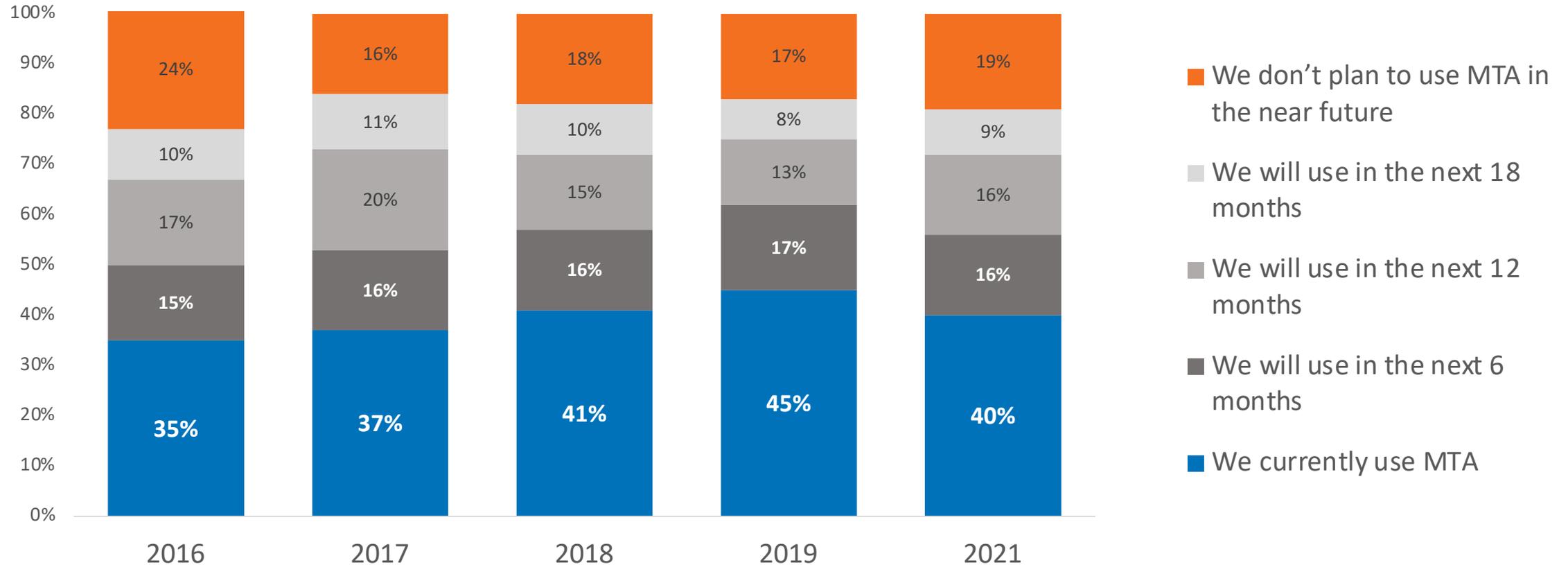


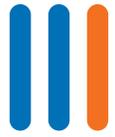
# What is the State of MTA in 2021?



# MTA adoption has taken a small step back since 2019

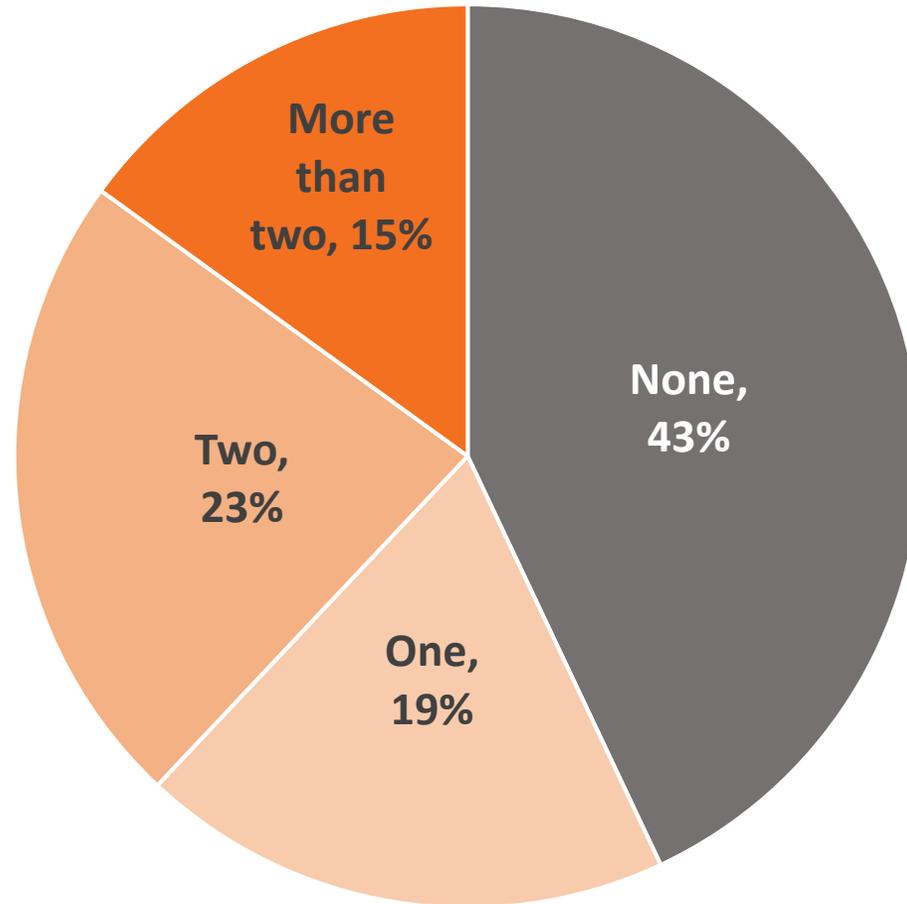
Percentage of companies currently using MTA or planning to do so in the future

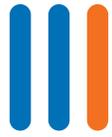




# The majority of marketers has some experience with MTA

How many MTA vendors have you *personally* worked with in the past (in your current organization or in a previous role)?





# Data access, organizational and other issues increase in importance.

**DATA QUALITY:** having trustworthy data on which to build MTA models

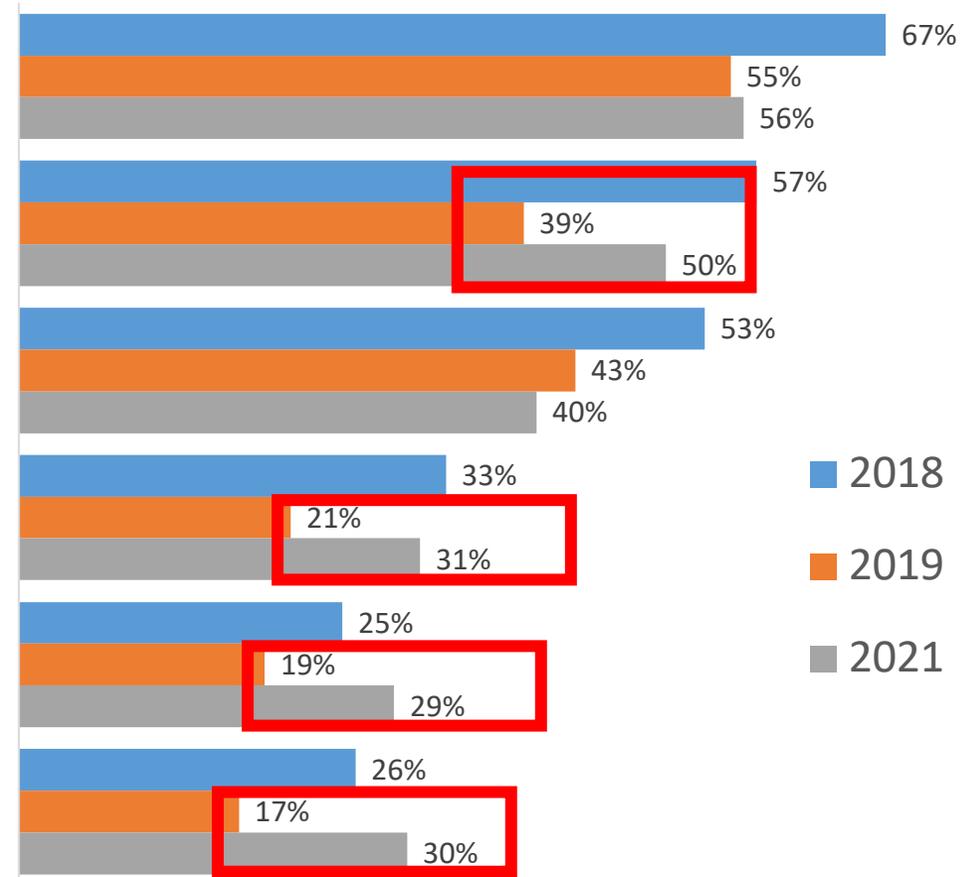
**DATA ACCESS:** Walled Garden or GDPR regulations, User Identity

**DATA LINKAGE:** Unified ID's, connecting data across devices and platforms, link to CRM

**ORGANIZATIONAL ISSUES:** Establishing ownership across stakeholders, ensuring senior management support

**COMPREHENSIVENESS:** measure a broad enough scope of activities & conversion behaviors to make MTA valuable

**METHODOLOGY CONFLICTS:** resolving discrepancies in marketing mix modeling, A/B testing and MTA results



How important is it to find a solution to each of these problems? (Where “Extremely important” means the MTA journey cannot continue, while “not important at all” means that it does not affect the continuation of the journey at all), NA, 2021, N=109

# || The promise of attribution is still strong

46%

MTA is the future of attribution

39%

MTA is promising but too complicated

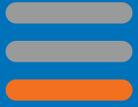
21%

MTA is unrealistic given the realities of the advertising ecosystem

# || Summarizing - State of MTA in 2021

1

**MTA adoption has taken a small step back since 2019, but the promise is still strong**

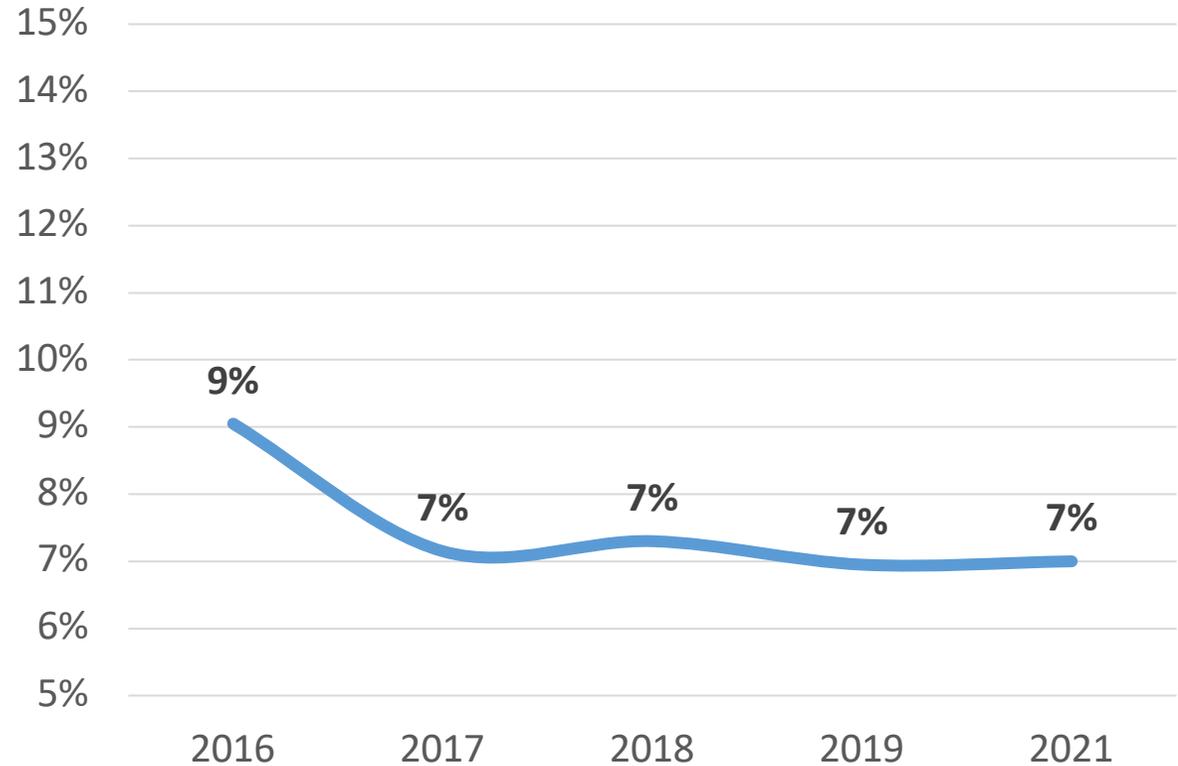


## How do MTA adopters use attribution?

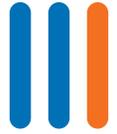
# || Companies are not fully taking advantage of MTA

# 54%

MTA users who don't have a clear sense of ROI



Q: 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) ; Q: 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? Sample size in NA; Users: N=56 (2020) N= (2019); N=102 (2018); N=88 (2017) N=90 (2016) ;

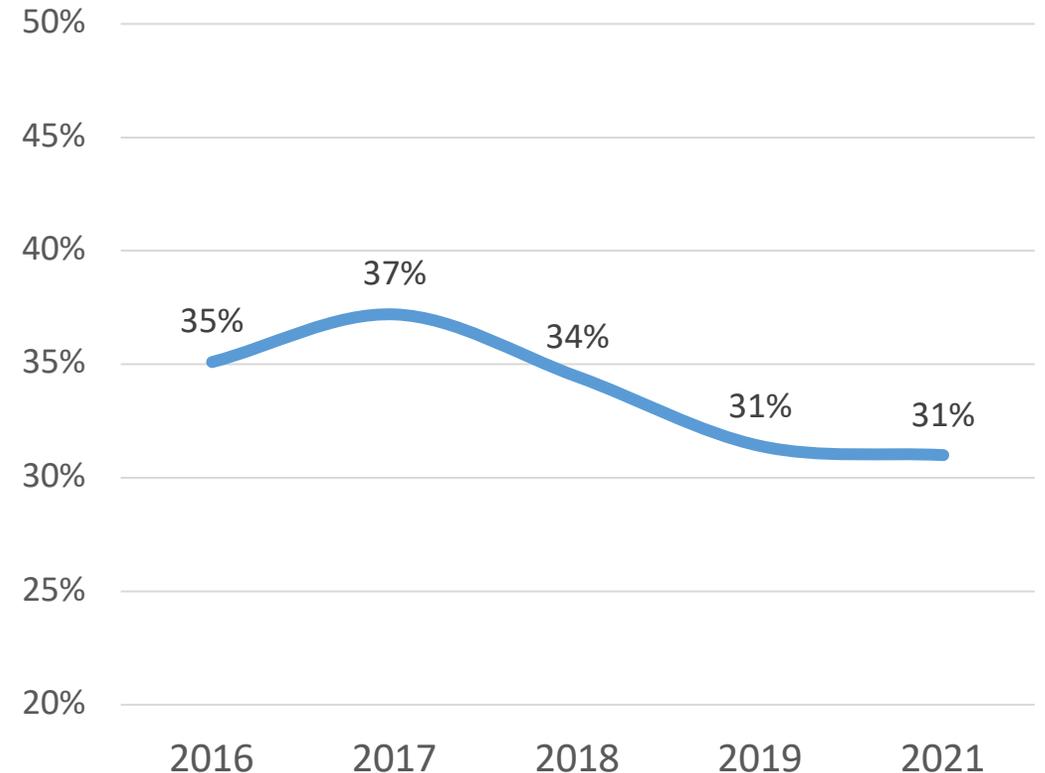


# Share of media analyzed by MTA shows no change

# 31%

Share of media budget  
measured by MTA,  
among users

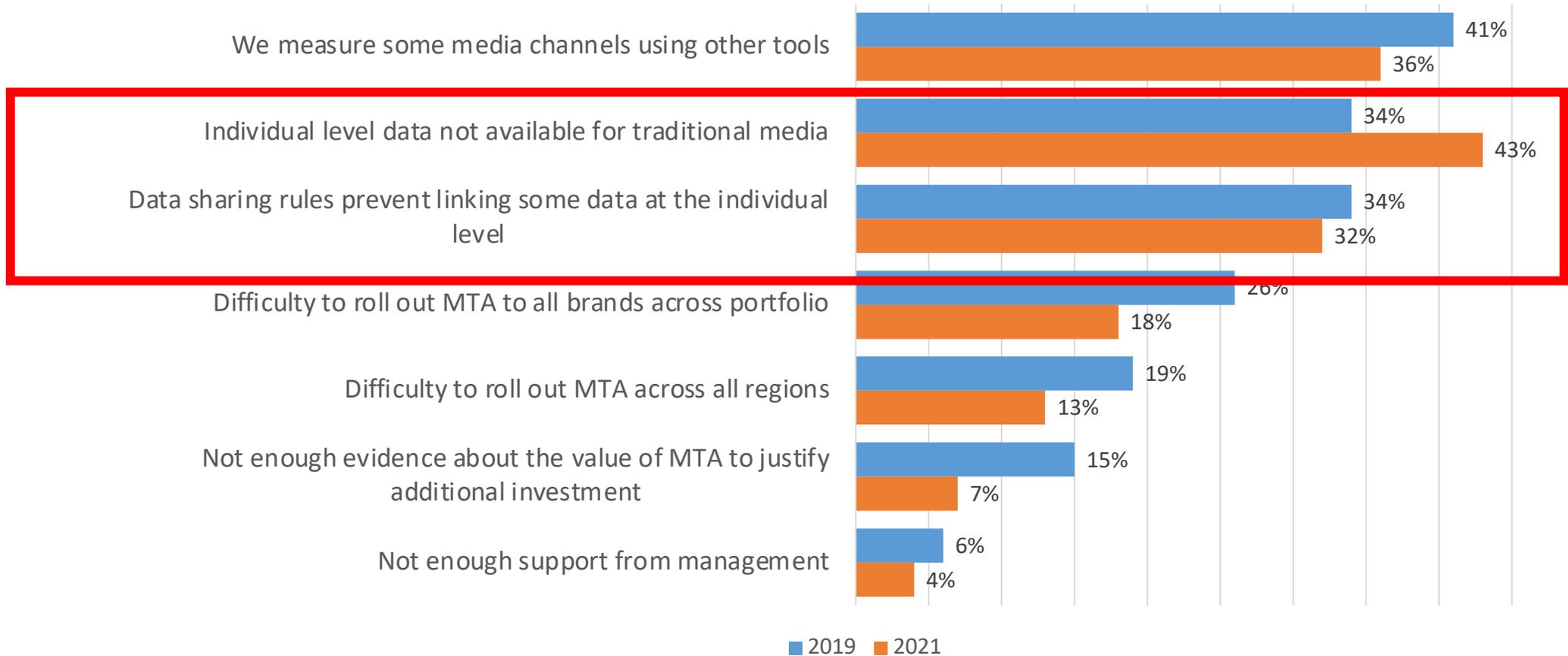
Share of media analyzed by MTA, North America



**||** *What are the main reasons that companies don't use MTA to assess a higher share of their media spend?*

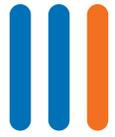


# Difficulties with individual level data prevent wider usage of MTA



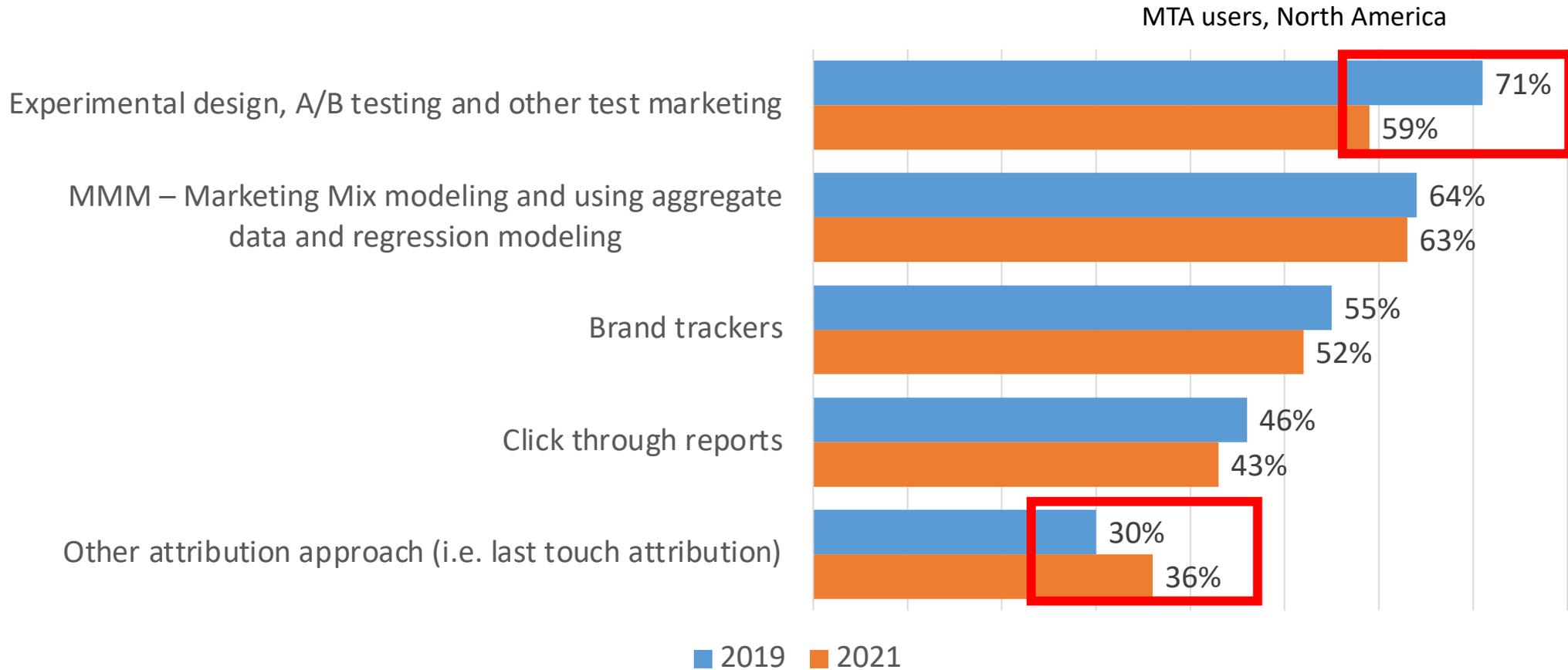
What are the main reasons that you don't use MTA to assess your total media spend? CHECK ALL THAT APPLY. N=56 Users in NA 2020





# Usage of experiments also show a decline, while usage of “other” attribution approaches strengthened a bit.

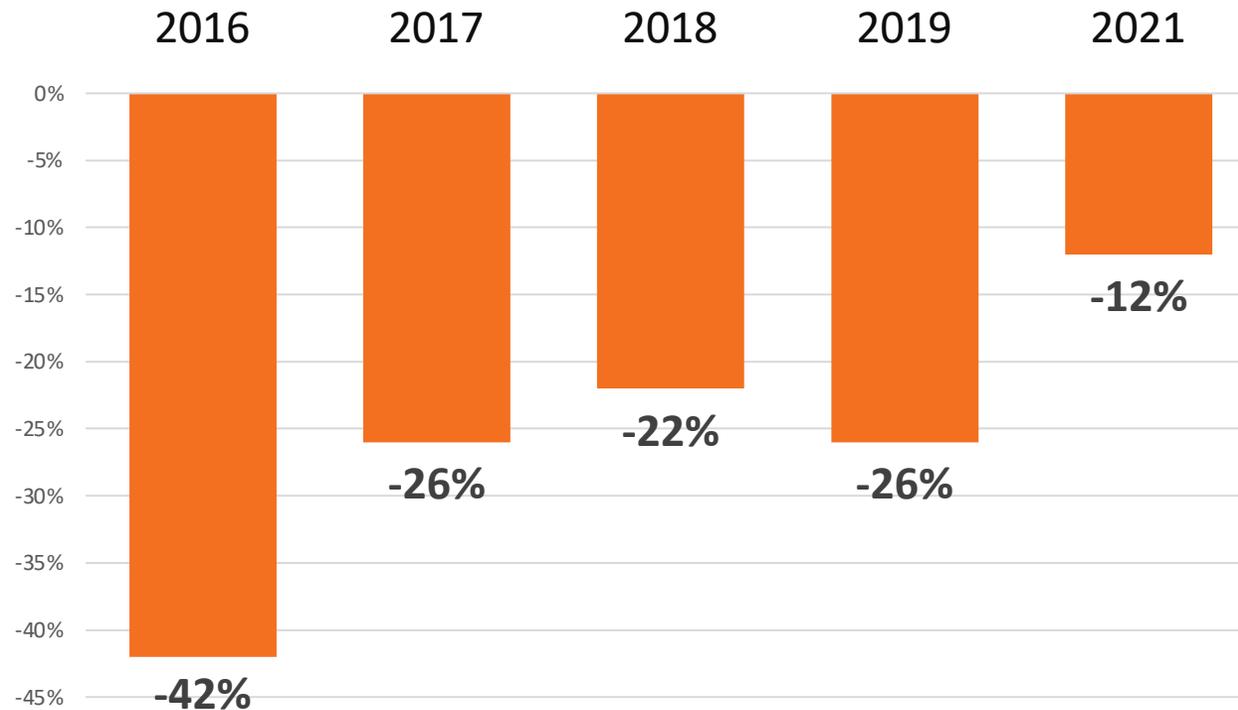
Measurement tools used to assess productivity of media spend, North America





# The NPS of MTA providers continues to improve as marketers become more experienced (although remains negative)

Net promoter score, North America vs other regions



# 43%

MTA users who have tried multiple MTA solutions before

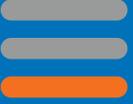
# || Summarizing - State of MTA in 2021

1

MTA adoption has taken a small step back since 2019, but the promise is still strong

2

**MTA maturity is still low among adopters. Difficulties with individual level data prevent wider usage of MTA among current adopters. But NPS on MTA continues to increase as marketers become more experienced.**



**What are the stages to MTA adoption and what roadblocks delay the process?**



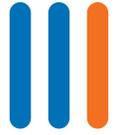
More than 1 out of 3 companies who are in the process of implementing MTA have tried before, unsuccessfully.

36%

Non users of MTA  
users who have tried  
to implement MTA  
and failed

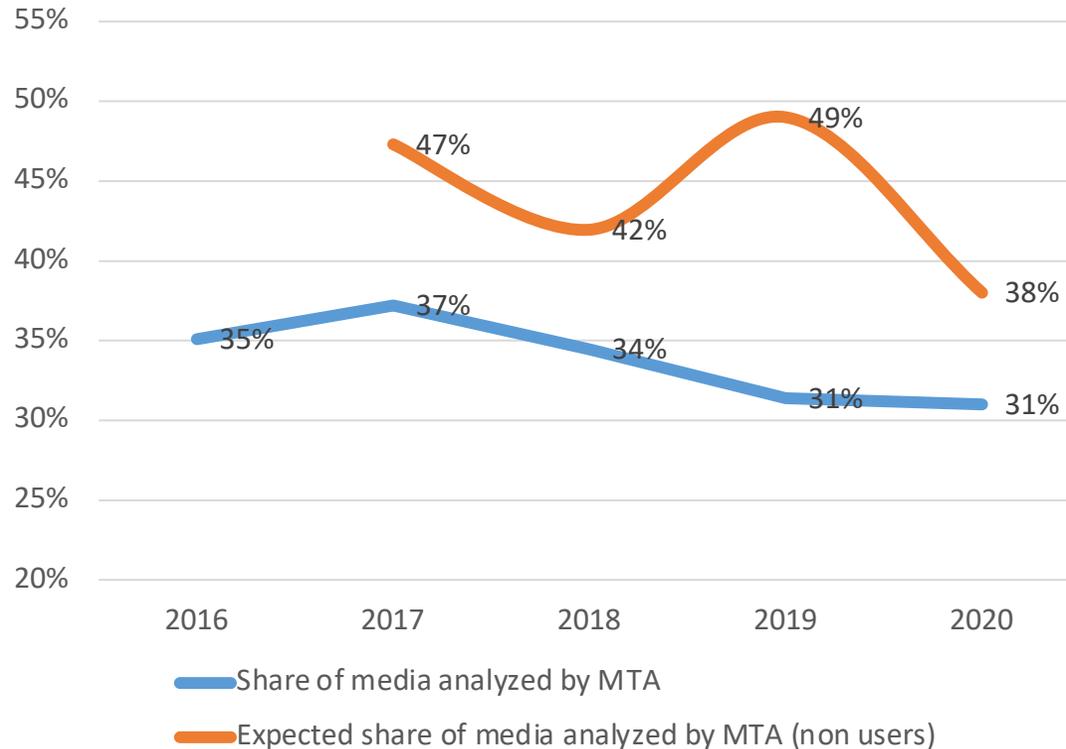
64%

Non users of MTA  
users who have no  
experience with  
MTA

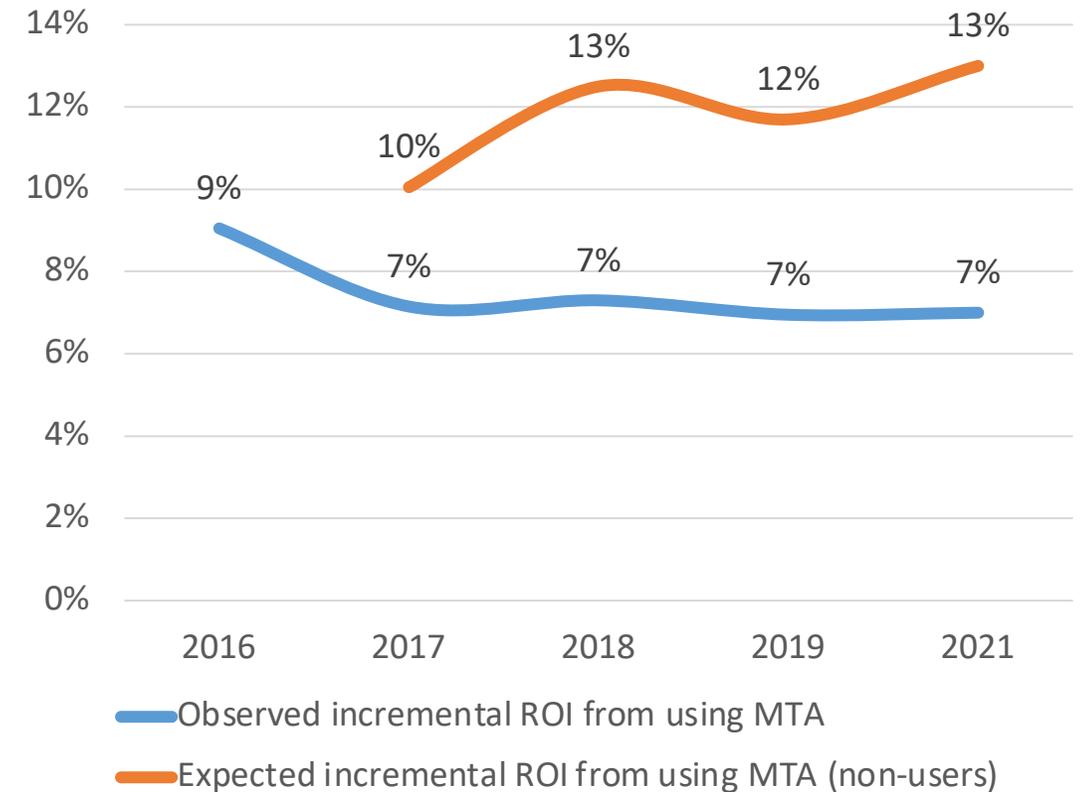


# Expectations from MTA are still somewhat optimistic

Share of media analyzed by MTA, North America



ROI from using MTA, North America



Q: 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) ; Q: 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? Sample size in NA; Users: N=82 (2020) N= (2019); N=102 (2018); N=88 (2017) N=90 (2016) ; Sample size Non-Users, who plan to use in the next 6-18 months : N=66 (2021) N= (2019); N=113 (2018); N=135 (2017)

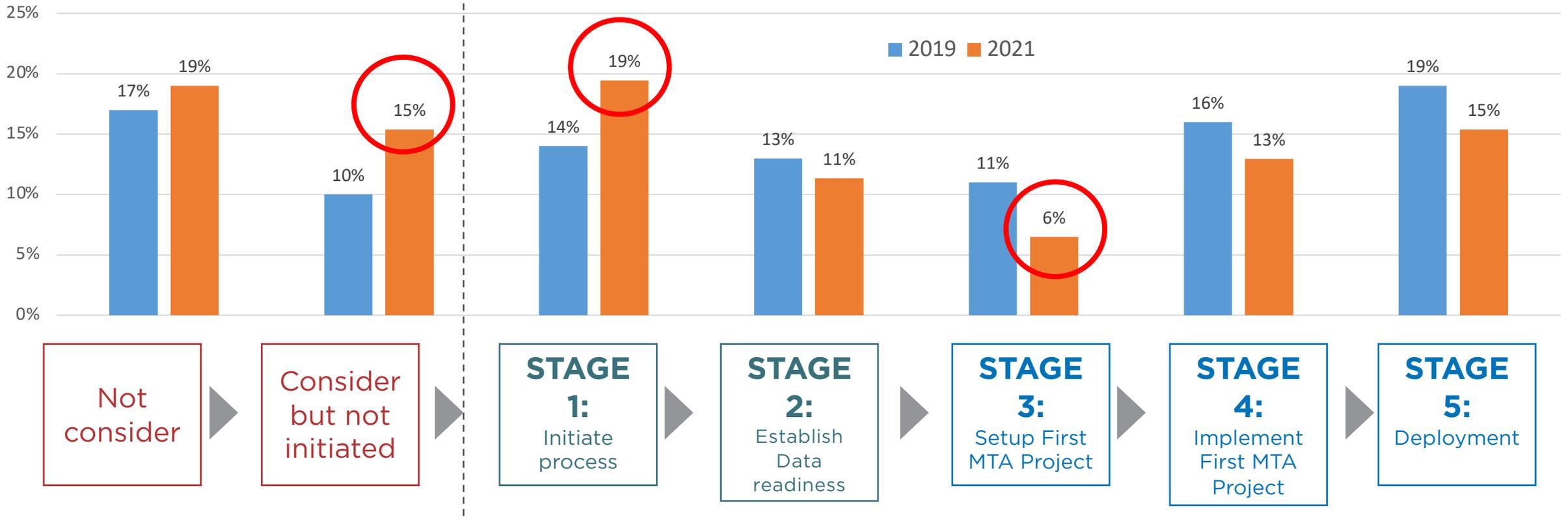


# Accumulated challenges are causing delays across the journey

Stages of MTA adoption, North America, 2020 vs 2019

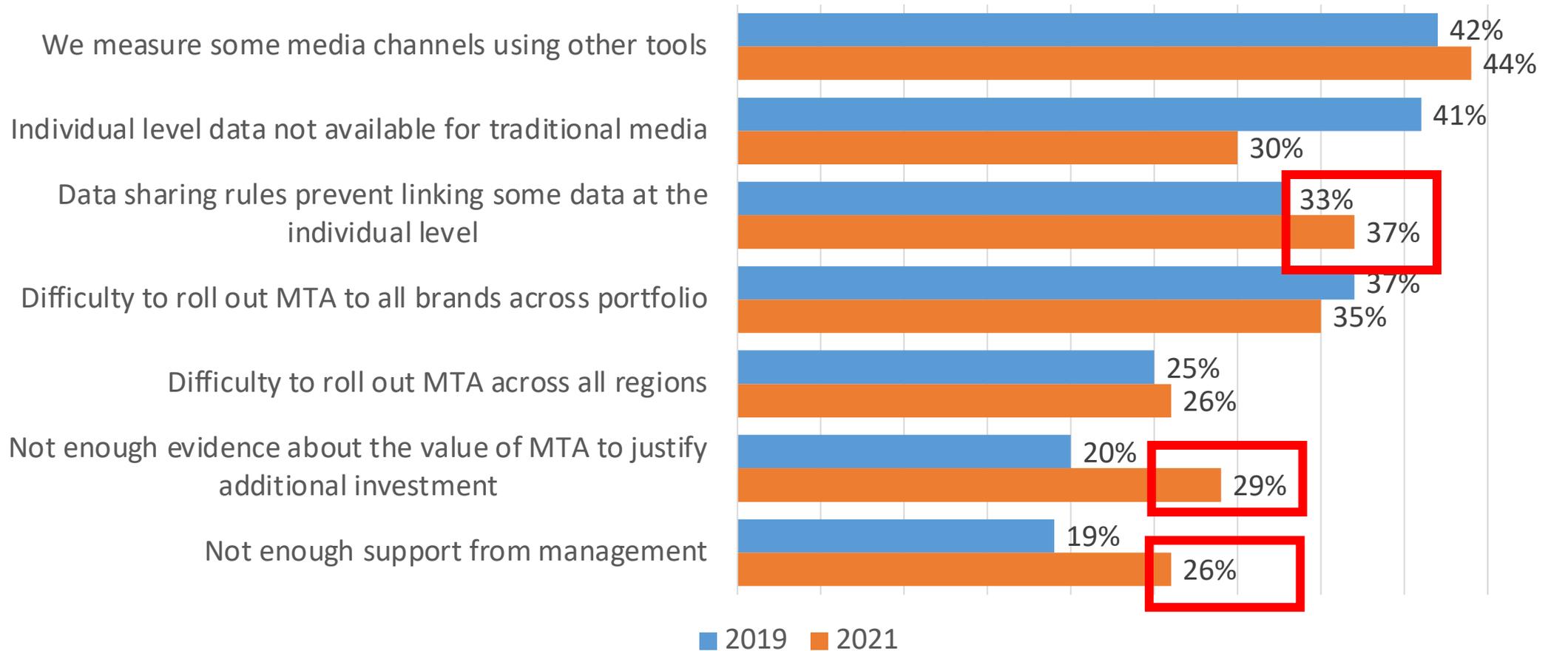
34% have not started (27% in 2019)

66% are now in some stage of implementation vs 73% in 2019

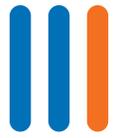




# Difficulties with *data linkage*, not enough *proof* and lack of *support from management* are becoming bigger hurtles

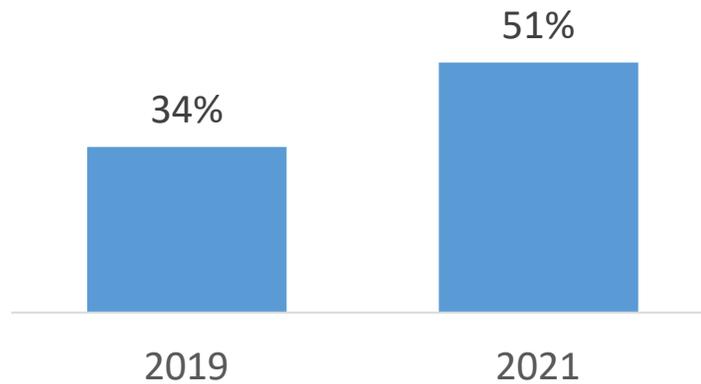


- What are the main reasons that you don't currently use MTA to assess your media spend, Non-MTA users who plan to use in the next 6-18 months, N=66 (2021)

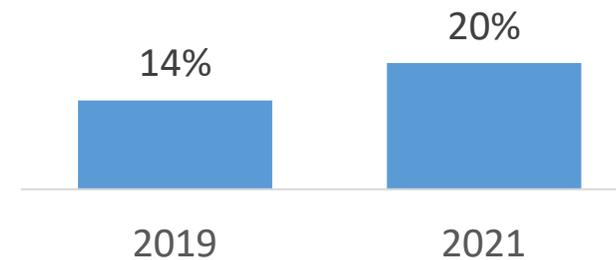


# Marketers need more help integrating results from different tools and getting their leadership on board.

Would most benefit my organization if I knew more about this topic



**Integration of Marketing Mix Models (MMM) and MTA results**



**CMO bootcamp on Attribution**

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3

**More than 1 out of 3 companies who are in the process of implementing MTA have tried before, unsuccessfully. Difficulties with data linkage, not enough proof and lack of support from management are becoming bigger hurdles, so marketers need more help integrating results from different tools and getting their leadership on board.**



# MATT

MARKETING ATTRIBUTION THINK TANK

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