State of MTA

Annual Marketer Survey

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Vas Bakopoulos

SVP-Research, MMA Global

We have been tracking the state of attribution for 6 years. We will focus on three important questions:

1 What is the state of MTA <u>adoption</u> in 2022?

2 How do marketers <u>see the role of MTA</u> in the context of unified measurement?

3 How satisfied are marketers overall with their ability to measure the impact of their marketing efforts?

MMA

1.

What is the
State of MTA in 2022?

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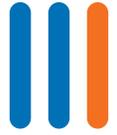
MTA adoption picks up after a drop in 2021

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

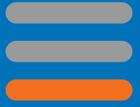|	2016	2017	2018	2019	2021	2022
We don't plan to use MTA in the near future	24%	16%	18%	17%	19%	18%
We will use in the next 18 months	10%	11%	10%	8%	9%	10%
We will use in the next 12 months	17%	20%	15%	13%	16%	10%
We will use in the next 6 months	15%	16%	16%	17%	16%	10%
We currently use MTA	35%	37%	41%	45%	40%	53%

Does your company currently use a multi touch attribution (MTA) solution or do you plan to use one in the future? Sample size in NA=158

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Marketers continue to experiment with MTA and gain more experience working with solutions providers

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

	2021	2022
More than two	15%	23%
Two	23%	22%
One	19%	26%
None	**43%**	**30%**

Legend: None · One · Two · More than two

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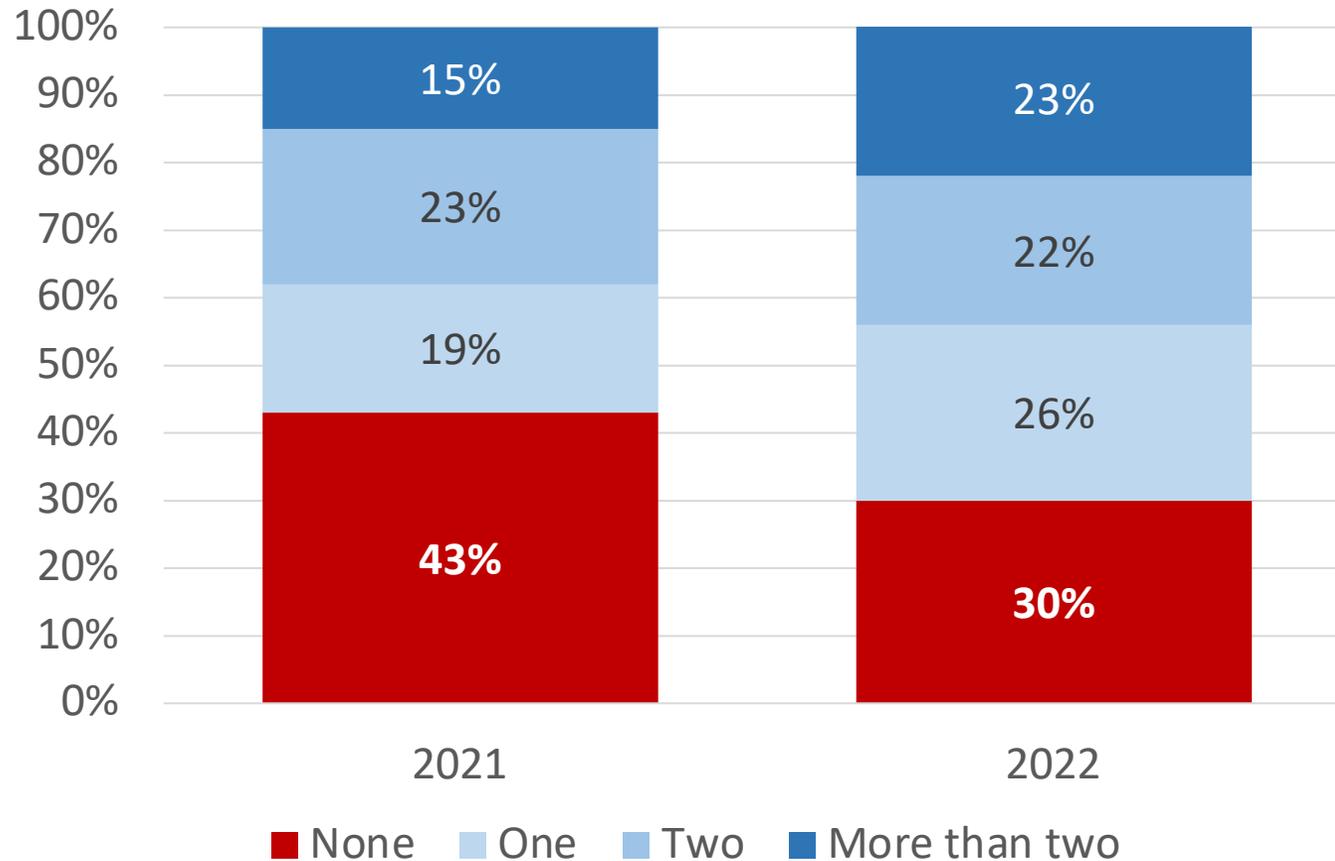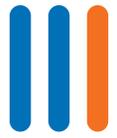
MTA maturity increases, as more marketers reach full deployment.

Stages of MTA adoption

Q: The following are five stages in which a company can be in when implementing a Multi-Touch-Attribution (MTA) method. Which of these stages best describes where your company is at? N=112 (2021); N=177 (2019)
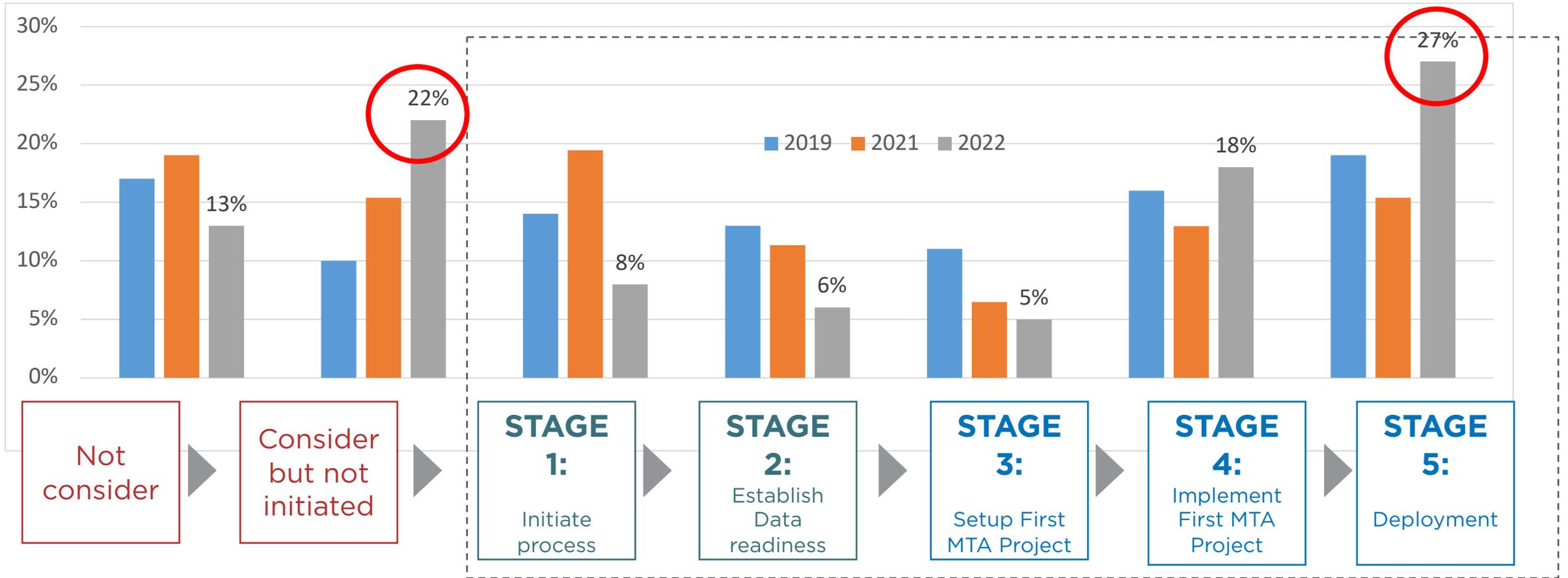
Despite the progress, NPS of MTA providers remains negative and fairly unchanged since last year.

Net Promoter Score of MTA solution

2016	2017	2018	2019	2021	2022
-42%	-26%	-22%	-26%	-12%	-16%

Q. Overall how likely is it you would recommend your main multi touch attribution (MTA) provider? Sample size: N=77

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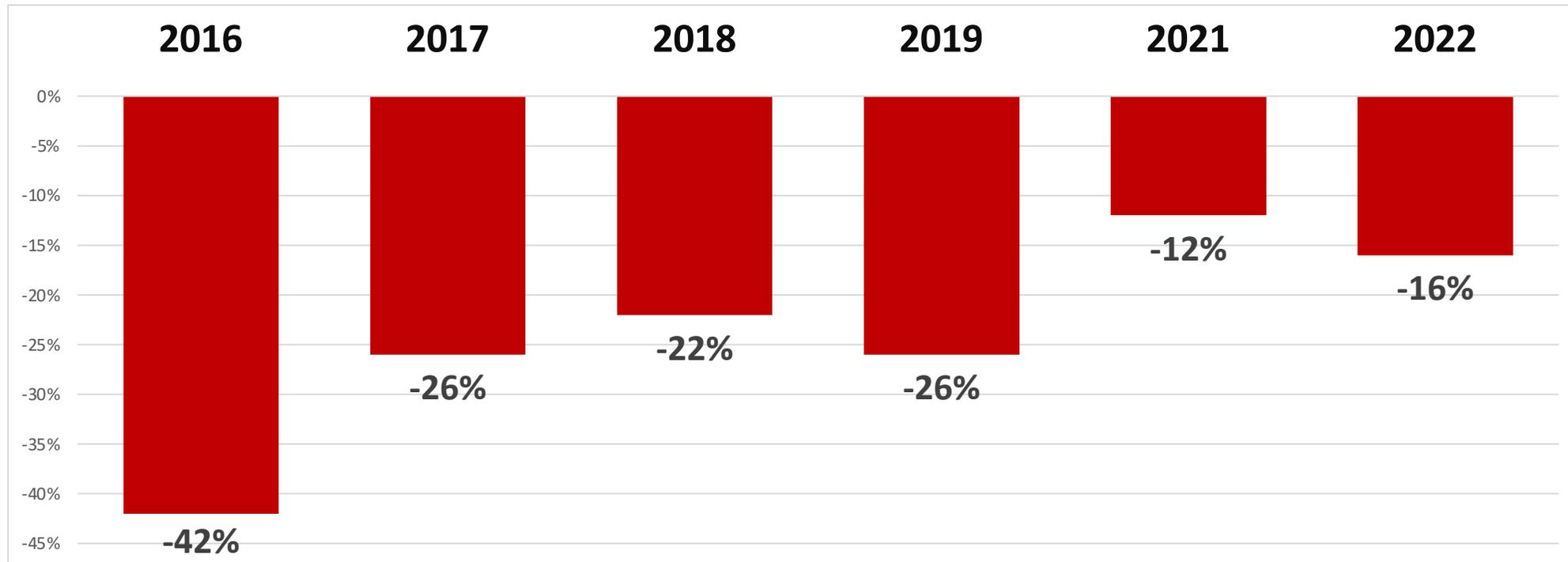
What is the
**State of MTA
in 2022?**

1.Higher adoption
2.More experience
3.Remains challenging

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How do marketers see the role of MTA in the context of unified measurement?

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As MTA matures, expectations and reality come closer together in terms of its role and contribution.

Share of media analyzed by MTA (%)
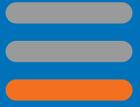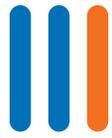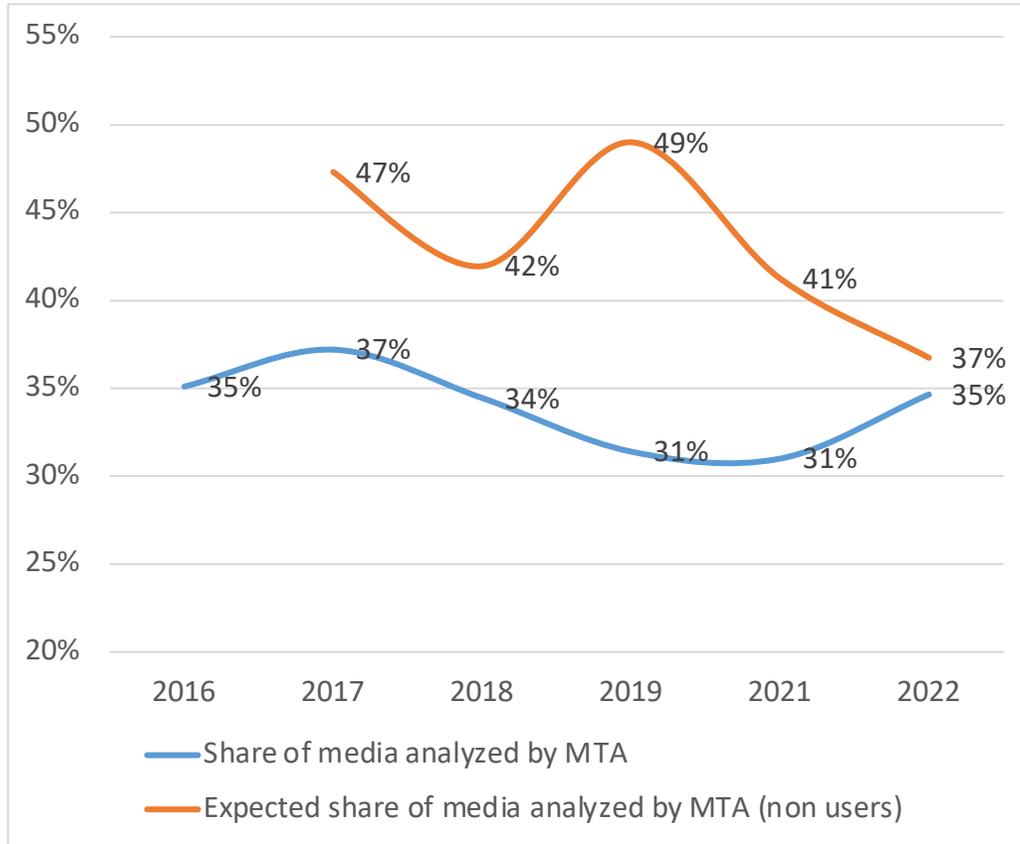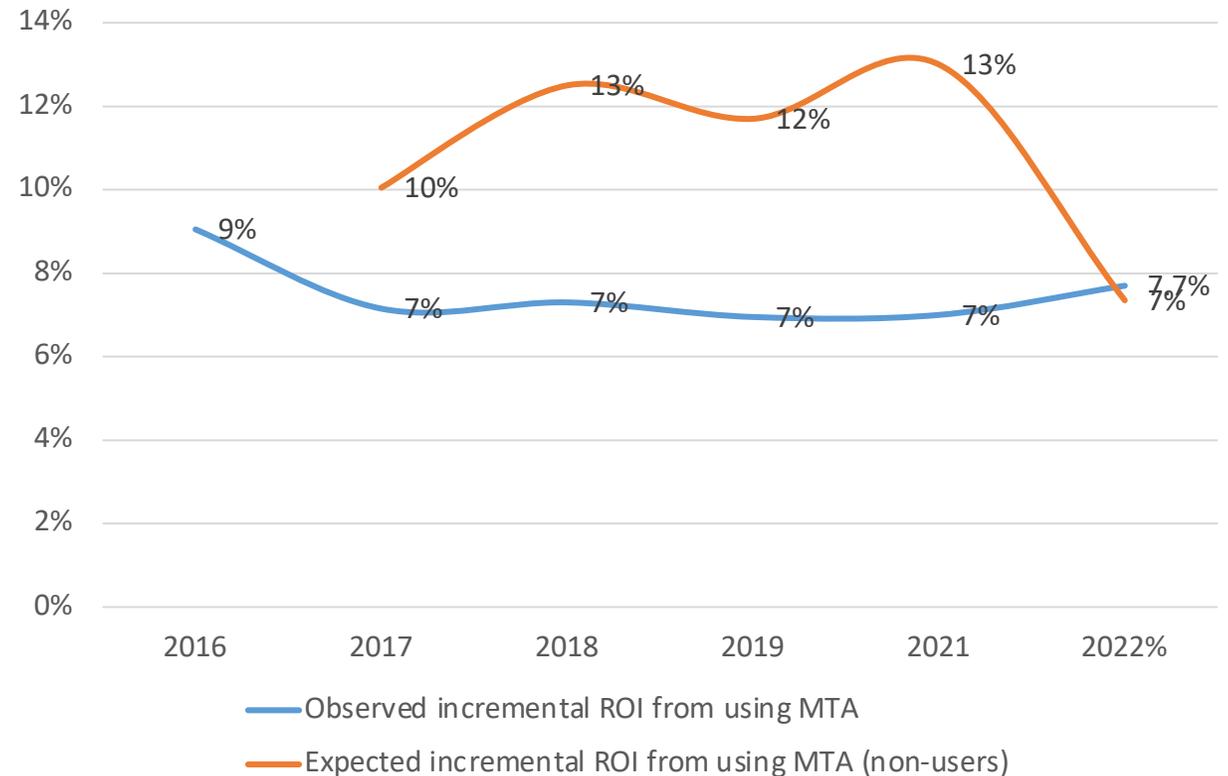

- Share of media analyzed by MTA
- Expected share of media analyzed by MTA (non users)

Values: 35%, 37%, 34%, 31%, 31%, 35% (Share of media analyzed by MTA)
Values: 47%, 42%, 49%, 41%, 37% (Expected share of media analyzed by MTA)

Expected ROI increase due to MTA usage

- Observed incremental ROI from using MTA
- Expected incremental ROI from using MTA (non-users)

Values: 9%, 7%, 7%, 7%, 7%, 7% (Observed incremental ROI)
Values: 10%, 13%, 12%, 13%, 7% (Expected incremental ROI)

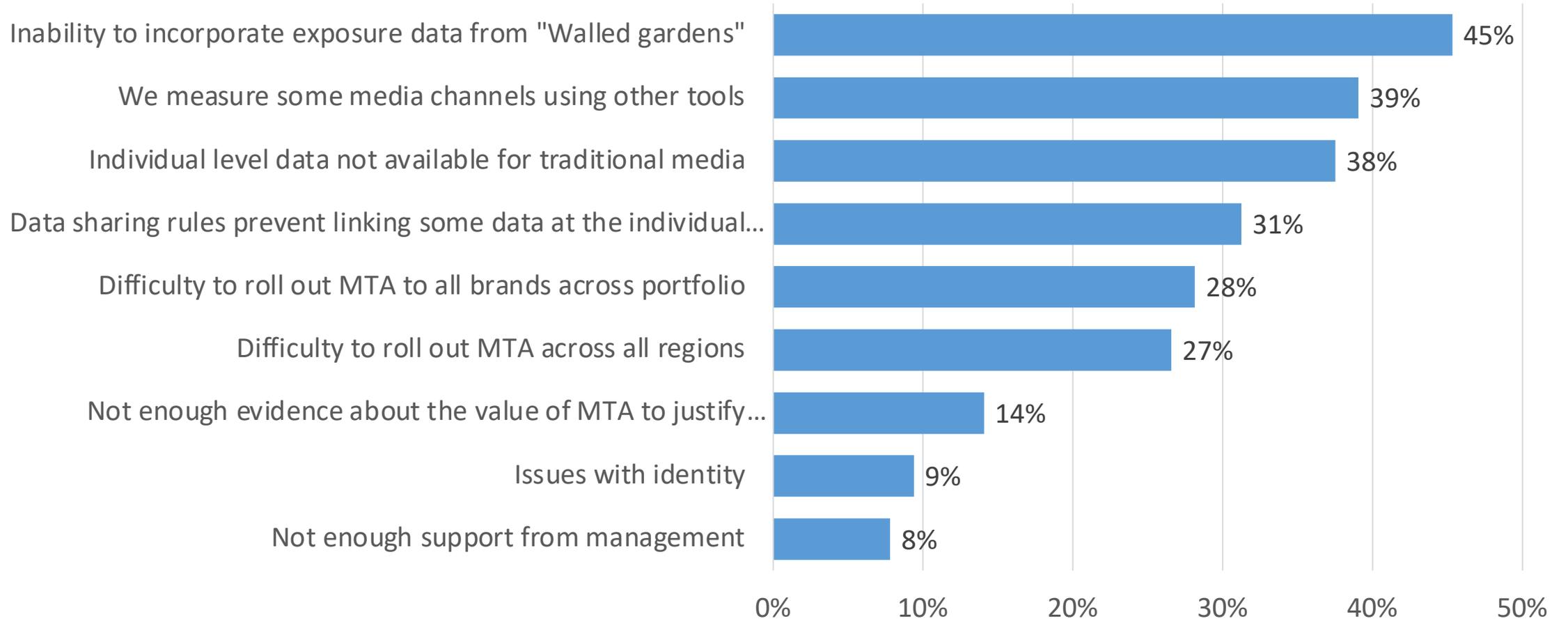Q: On average, what percent of your total marketing spending would you want to be able to evaluate using MTA after a year of onboarding an MTA solution? Sample size in NA; Users: N=64, Non users N=39* small sample

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=64, Non users N=39* small sample

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MTA is typically not seen as a holistic attribution solution.

Main reasons/barriers that prevent marketers use their MTA solution more broadly (%)

Barrier	%
Inability to incorporate exposure data from "Walled gardens"	45%
We measure some media channels using other tools	39%
Individual level data not available for traditional media	38%
Data sharing rules prevent linking some data at the individual...	31%
Difficulty to roll out MTA to all brands across portfolio	28%
Difficulty to roll out MTA across all regions	27%
Not enough evidence about the value of MTA to justify...	14%
Issues with identity	9%
Not enough support from management	8%

What are the main reasons that you don't use MTA to assess your total media spend? (Users)

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MTA is increasingly seen as a <u>crucial part</u> of unified measurement, among both users and non-users

71%
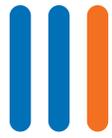
59%

46%

MTA Users

MTA is crucial as part of an ensemble of measurement solutions that include MMM and experimental design
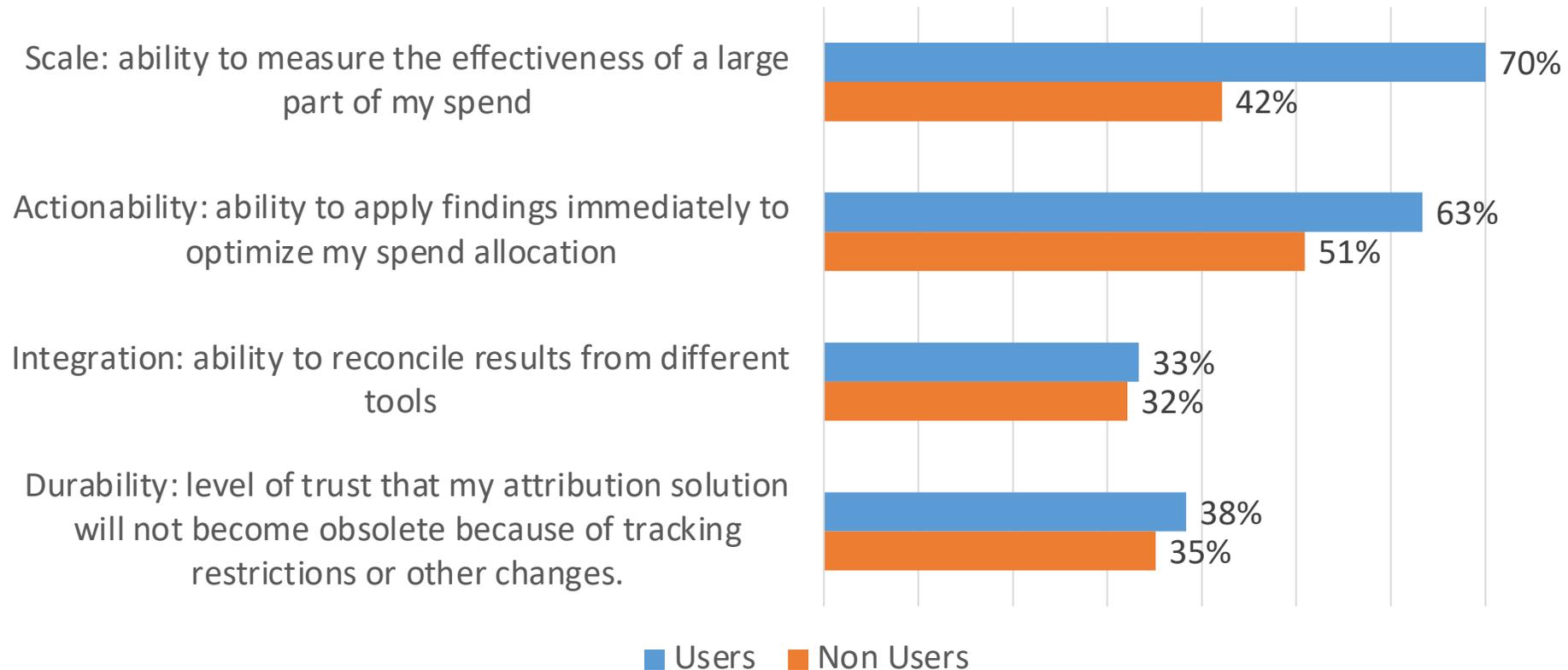
MTA Non-Users

Finally, which of the following statements do you agree with when it comes to MTA? N=105, users and non-users

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MTA enhances <u>scale and actionability</u> in marketing productivity measurement

Satisfaction in each of the following areas (MTA users vs non-users)

Scale: ability to measure the effectiveness of a large part of my spend
- Users: 70%
- Non Users: 42%

Actionability: ability to apply findings immediately to optimize my spend allocation
- Users: 63%
- Non Users: 51%

Integration: ability to reconcile results from different tools
- Users: 33%
- Non Users: 32%

Durability: level of trust that my attribution solution will not become obsolete because of tracking restrictions or other changes.
- Users: 38%
- Non Users: 35%

■ Users ■ Non Users

Thinking about all the tools that you use to perform attribution in a unified way, what is your level of satisfaction in each of the following areas? Total sample MTA users N=60, Non-users N=57
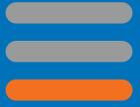
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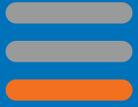
How do marketers see the role of MTA in the context of unified measurement?

1. Expectations and reality come closer together.
2. MTA is seen as a crucial part of unified measurement.
3. Scale and actionability benefits associated with MTA.

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3.

How satisfied are marketers overall with their ability to measure the impact of their marketing efforts?

There is still a long way to go in terms of reconciling results from different tools, especially when it comes to measuring brand.

Ability to reconcile MTA with other tools

	Fully/to a good extent
MMM – Marketing Mix modeling and using aggregate data and regression modeling	48.72%
Click through reports	39.13%
Experimental design, A/B testing and other test marketing	38.10%
Brand trackers	21.95%

To what extent have you managed to reconcile your MTA results with those from each of the following methods? N=60

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Many marketers still feel unable to conclusively determine which tactics perform best

Top Problem statements in marketing productivity and attribution

46%

How to determine which channels, creative assets, and publishers are producing highest return on marketing investment

38%

Identifying KPIs for measuring marketing effectiveness, including benchmarks & measurement approaches
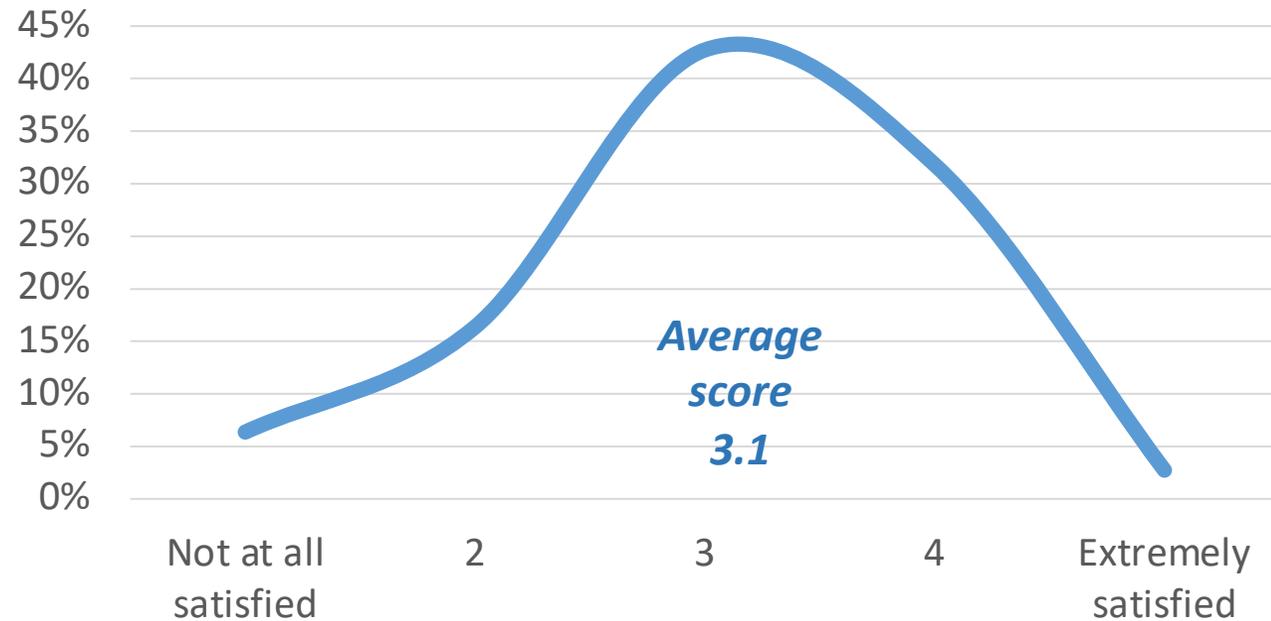
Which of the following potential MMA initiatives would most benefit you and your organization in 2022?Please pick your top 3. N=105

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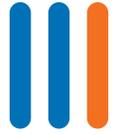
More effort is needed to consolidate results into clear and actionable scorecards for management

Satisfaction from score card for senior leaders

Average score 3.1

y-axis: 45%, 40%, 35%, 30%, 25%, 20%, 15%, 10%, 5%, 0%

x-axis: Not at all satisfied, 2, 3, 4, Extremely satisfied

What is your level of satisfaction with the score card that senior leaders use from the standpoint of campaign effectiveness and attribution metrics? Sample size N=110

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Conclusions:
State of MTA in 2022

State of MTA:
Higher adoption, more experience, still challenging.

Role in Unified measurement:
More clarity that an ensemble is needed, with MTA at the core.

Confidence in measurement & attribution
More work is needed to clarify metrics, reconcile and distill results for management.

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