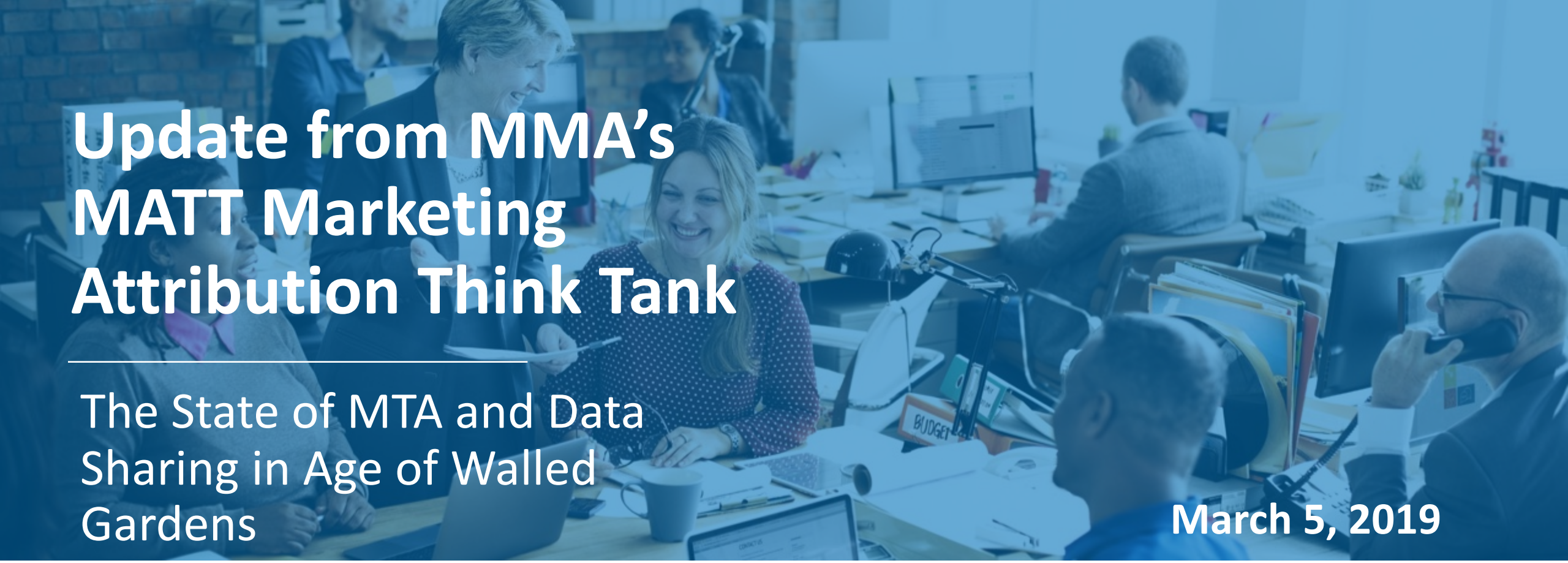


Update from MMA's MATT Marketing Attribution Think Tank

The State of MTA and Data Sharing in Age of Walled Gardens

March 5, 2019

A product of MMA's

MATT
MARKETING ATTRIBUTION THINK TANK

MMA

Today's meeting

1. The MMA – Focus on Future of Marketing
2. MATT's mission and overview of deliverables
3. State of MTA based on MMA annual benchmark survey
4. A preview of MMA MATT Data sharing in the age of MTA paper – coming soon!
5. 2019 new initiatives: journey map and Brand versus performance study

MMA Global Board of Directors

Luis Di Como
Chair
EVP, Global Media

Carolyn Everson
Global Secretary
VP, Global Mktg Solutions

Tim Mahoney
Exec Comm at Large
CMO

Karin Timpone
Exec Comm at Large
Global Mktg Officer

Jack Philbin
Exec Comm at Large
Co-Founder & CEO

Sanjay Gupta
CMO
Former Allstate

Greg Stuart
MMA
CEO Mobile Marketing Association

John Costello
Global Chair Emeritus
Former Pres., Global Mktg & Innovation

Stephen McCarthy
Global Treasurer
CFO
(xAd)

David Godsman
CDO

Melissa Waters
Former VP of Marketing

Marie Gulin-Merle
CMO

Peter McGuinness
Chief Mktg & Brand Officer

Suzy Deering
CMO

Linda Yaccarino
Chairman of Advertising & Client Partnerships

Marc Mathieu
CMO

Matt Derella
Head of Customers

Rebecca Messina
CMO

Allan Thygesen
President, Americas

Jay Jaffin
CMO

Tony Rogers
Chief Member Officer

Kellyn Kenny
Global CMO

Jeff Lucas
VP, America Sales

Cameron Clayton
CEO & General Manager

Ayesha Gilarde
CMO

Wanda Young
CMO

Nick Drake
EVP, Marketing and Experience

Antonio Tomarchio
CEO

John Trimble
CRO

Deren Baker
CEO

Michael Donnelly
NA Regional Rep
SVP, Global Digital Marketing

Louis Paskalis
NA Regional Rep.
SVP Enterprise Media Executive Bank Of America

Ernesto Echeverri
LATAM Regional Rep
Dir. Mktg USA, Canada & Caribbean

Alberto 'Banano' Pardo
LATAM Regional Rep
Founder & CEO

David Porter
APAC Regional Rep
VP, Global Media

Jeremi Gorman
Chief Business Officer

Tom Pallack
CEO

MMA North America Board of Directors

Louis Paskalis
Chair
SVP, Enterprise Media Executive, Bank of America

Amit Shah
CMO
1-800-Flowers.com

Kristi Argyilan
SVP, Marketing
Target

Norman de Greve
CMO & SVP
CVS

Jon Suarez-Davis
Chief Strategy Officer
Salesforce Marketing Cloud

Greg Stuart
MMA
CEO Mobile Marketing Association

Jack Philbin
Chair Emeritus
Co-Founder & CEO, Vibes

Carrie Seifer
VP, CRO,
IBM Watson Advertising (The Weather Company)

Mike Romoff
Head of Global Agency and Channel Sales, LinkedIn

Tatyana Zlotsky
Vice President Digital Acquisition
American Express OPEN

Elizabeth Herbst-Brady
Head of US Field Sales
Verizon Media Group

Brad Feinberg
VP of Media and Consumer Engagement
MillerCoors

Dave Sanabria
Manager, Connected Consumer Experiences
Ford

Jonathan Beamer
CMO
Monster

Paul Donato
Chief research Officer
ARF

Jay Altschuler
VP, Media VP, Media
Samsung

Ophelia Ceradini
VP, Digital Inn & Tech
Estee Lauder

Gregg Dorazio
Director, Brand Marketing & Planning
Giant Food

James Kreckler
SVP Digital Media
NBCU

JP Maheu
VP, Twitter Client Solutions, Americas
Twitter

Marissa Tarleton
CMO,
RetailMeNot

Kristen D'Arcy,
VP, Marketing
American Eagle

Duncan McCall
CEO & Co-Founder
PlaceIQ

Mark Wright
VP Media Services & Sponsorships, AT&T

Suzie Reider
Managing Director
Waze

Brent Bouldin
VP, Marketing & Consumer Acquisition
Choice Hotels

Maggie Mesa
VP, Business Development
OpenX

Dave Madden
SVP, Global Brand Partnerships
Electronic Arts

Vic Noble
VP/Head of Brand
Shire

Kevin Frisch
CMO
Wag!

Gail Horwood
CMO
Kellogg Company

Michael Perlman
CRO
Jumpshot

Jeff Glueck
CEO
Foursquare

Jeni Gardner
Sr. Director of Investment & Partnership
Unilever

Bridget Davies
VP of Advertising & Marketing Activation
ebay

Tony Weisman
CMO
Dunkin' Brands

Tressie Lieberman
VP, Digital and Off-Premise
Chipotle

Jeremy Steinberg
CRO
Yieldmo

Stephen Frieder
President
Adobe

Geoff Cottrill
Head of Marketing
Coca-Cola

Nadine Karp McHugh
SVP, Omni Media
L'Oreal

Valentina Marastoni-Bieser
SVP, Marketing
Cuebiq

Dara Treseder
CMO
Carbon

Bruce Rogers
Head of Marketing
SITO Mobile

Matt Ramerman
CEO
CLX Communications

MMA Operating Agenda is Set Based on MMA Purpose

WHO (The People We Serve):
Prime Audience: Chief Marketers

WHY (Our Reason for Being):
Purpose: To accelerate the transformation and innovation of marketing through mobile, driving business growth with closer and stronger consumer engagement.

WHAT (Our Strategic Priorities):
Primary Focus:

1. **Demonstrating Measurement and Impact**: proving effectiveness and optimizing impact
2. **Cultivating Inspiration**: aimed at the Chief Marketer; guiding best practices and driving innovation
3. **Building Capability for Success**: fostering know-how and confidence within the Chief Marketer's organization

Secondary Focus:

Advocacy – monitoring and maintenance activity only; via partnership with the DAA

2019 MMA Operating Agenda

Measurement, Capabilities, Innovation & Member Value

Measurement

1. **MATT** – Future of Marketing Attribution Think Tank
   a. Support marketers via Phase II Data releases and provide in-house support
   b. Continue seeking bigger MTA agenda (BaP)
2. Mobile **Cognition** Consortium Study
3. **SMoX** Results Rollout:
   a. Complete ALL Wave II studies
   b. Deliver in-house to xx marketers, share at 15+ MMA events

Capabilities

1. **MOSTT** – Future of Marketing Org Structure Think Tank
   a. Develop the M.A.R.S. insights into a tool that is released
   b. Expand the M.A.R.S. agenda
2. Future of Brand Safety Council - **SAVE**
3. Future of Mobile Fraud Council
4. Customer Centricity in Age of Mobile
   1. (Aka) Mobile **Maturity** initially defined for marketers

Innovation (Creativity)

1. Key Global **Events**
   a. CEO & CMO Summit (Sonoma)
   b. MMA INNOVATE & IMPACT
2. **SMARTIES** Awards
   a. Build out Business Impact index
3. **Case Study Hub** relaunch
   a. Relaunch, measure & expand

Member Value & Engagement

1. Peer Groups (MM25 plus Member Committees)
2. Marketer Webinars (xx+)
3. White Papers / Trends / Guidance reports
4. Regional Events (MMA Forums in 15 countries)
5. Global Board offsite

Industry Protection

1. Development of data management practices in the area of location

Legend	
	Started past years
	Added in 2018
	New for2019

What MMA is Expected to Release in 2019

MATT

MATT-Benchmark of Marketers views of MTA 2019 (VB/JR)
MATT-MTA Journey Map (JR)
MATT-Walled Garden Strategy Guide (JR)
MATT-BaP – Prewave Results of first 3 studies (VB/JR)
MATT-What CMOs Need to Know About…MTA (JR)
MATT-MMM vs MTA Document (Prelim) (JR)
MATT-Omni Channel Data Strategy (Prelim) (JR)
MATT-formation of Publishers on MTA (Prelim) (JR)
MATT-Relaunch of MATT Program with simpler insight series (JR)

SMoX

SMoX-Ford Case Study (VB)
SMoX-MillerCoors Case Study (VB)

SAVE

SAVE-Brand Safety Strategy Template Guide (GS)
SAVE-Brand Safety Research Project (GS)
SAVE-Brand Safety Vendor Guide (Prelim) (GS)

MOSTT

MOSTT-M.A.R.S. Capabilites Diagnostic Tool (GS)
MOSTT-M.A.R.S. Initial Benchmark Results from Tool (GS)
MOSTT-Insource/Outsource Diagnostic Tool (GS)
MOSTT-Insource/Outsource Diagnostic Research Results (GS)
MOSTT-What CMOs Need to Know About…Insourcing vs. Outsourcing (GS)

FUTURE OF…

Future of Mobile Fraud-Global Survey Research on Marketers Views (VB)
Future of Mobile Fraud-Regional Marketer Survey (VB)
Future of Mobile Fraud- Diagnostic Tool to Assess Fraud Risk (prelim) (VB)
Future of Mobile Fraud-Guidance Report Fraud Types and Best Practices (prelim) (VB)
Future of ……5G Report (TBD)
Future of ……AI Report (TBD)
Future of…. VR/AR Report (TBD)
Future of… IoT (TBD)
Future of …… Marketing Advisory Council (formation) (TBD)

COGNITION

Cognition-Triggering cognition in the age of short attention spans: Neuroscience Research results and implications for creative (VB)

COMMITTEES

Messaging Committee- What is RCS? Progress Report (LS)
Messaging Committee- What is Current State RCS Progress Report (prelim) (LS)
Messaging Committee- Advanced RCS Progress Report (prelim) (LS)
Messaging Committee-The guide to 10-digit long code - 10DLC (LS)

Mobile Programmatic Committee Terminology Guide (LS)
Mobile Programmatic Committee-First guidance report on in-app header bidding (prelim) (LS)
Mobile Programmatic Committee-Guidance report on the adoption of viewability and brand safety measures across the mobile programmatic ecosystem (prelim) (LS)

Mobile Programmatic & Mobile Video Committee – Joint Guidance Report in Three Parts:
1) Intro and Why Mobile is Not Desktop;
2) Buying Challenges and Caveats
3) Understanding & Leveraging Creative Options and Conclusions.
Video Committee- Measurement Report on Lengths & Data (LS)

LOCATION

Location Data (Cuebiq- Survey of Marketers to identify their concerns and priorities with data accuracy and transparency (data fraud), quality, sources of data, and alternate use cases for location data. (SD)
Creation of a Cuebiq/marketer led Location Council (SD)
Location Committee-Other items TBD after Location Council of brands and sellers identify issues to address (LS)

Co-branded Jumpshot/MMA Consumer Trends/Path-to-Purchase Insights Report (SD)

SMARTIES

SMARTIES-9 Countries SMARTIES Awards (NA, UK, Spain, Turkey, South Africa, MENA, India, Vietnam, Indonesia, China)
SMARTES-4 Regional SMARTIES Awards (EMEA, LATAM, APAC) (MDs)
Global SMARTIES Awards (SD)
Business Impact Index (BII) on Mobile Creative Excellence (Global + 4 Regions) (BP)
Global and North America Smarties Trends Report (SD+BP)

MATT's MTA Mission…

This is where we started

MATT
MARKETING ATTRIBUTION THINK TANK

[To support marketers to]

Select and apply…

[MTA Solutions]

…with confidence

More specifically:

1) Make multi-touch attribution (MTA) easier to implement
2) Create a knowledge sharing and discussion environment that builds confidence in MTA
3) Provide the industry with a go-to resource center for MTA

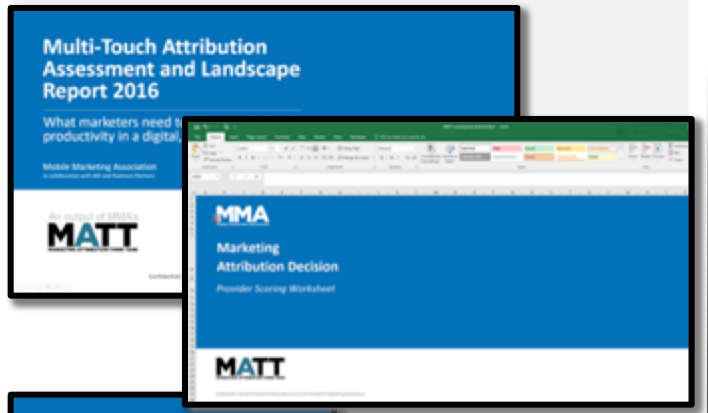
MMA

MATT's MTA Toolkit for Marketers…https://www.mmaglobal.com/matt

Select…

MTA Decision Guide™

- MTA Landscape Report
- MTA Provider Scoring Tool
- MTA Request for Information
- 4-Part Intro to MTA Webinar





Part 1:
Intro to Multi-Touch Attribution (MTA) Methods

Part 2:
Selecting the Best MTA Provider For Your Needs

Part 3:
Making Sense of Attribution Approaches

Part 4:
Leveraging MTA to Improve Marketing Effectiveness

Released Nov'16

Released Jan '17



MTA Data Strategy Guide™



Released Sept '17

MMA MTA Data Map™

and Apply…

4 QUARTERLY BENCHMARK SURVEYS

MTA Tactical Success Guide™



Released June '18

New!

Data Acquisition RFI™

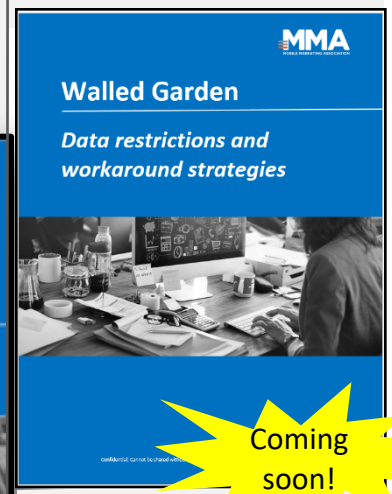


Released Dec '17

with Confidence

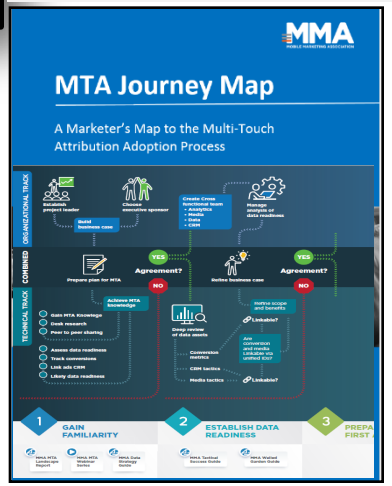
Coming soon!

Data Sharing™



Coming soon!

MTA Journey Map™



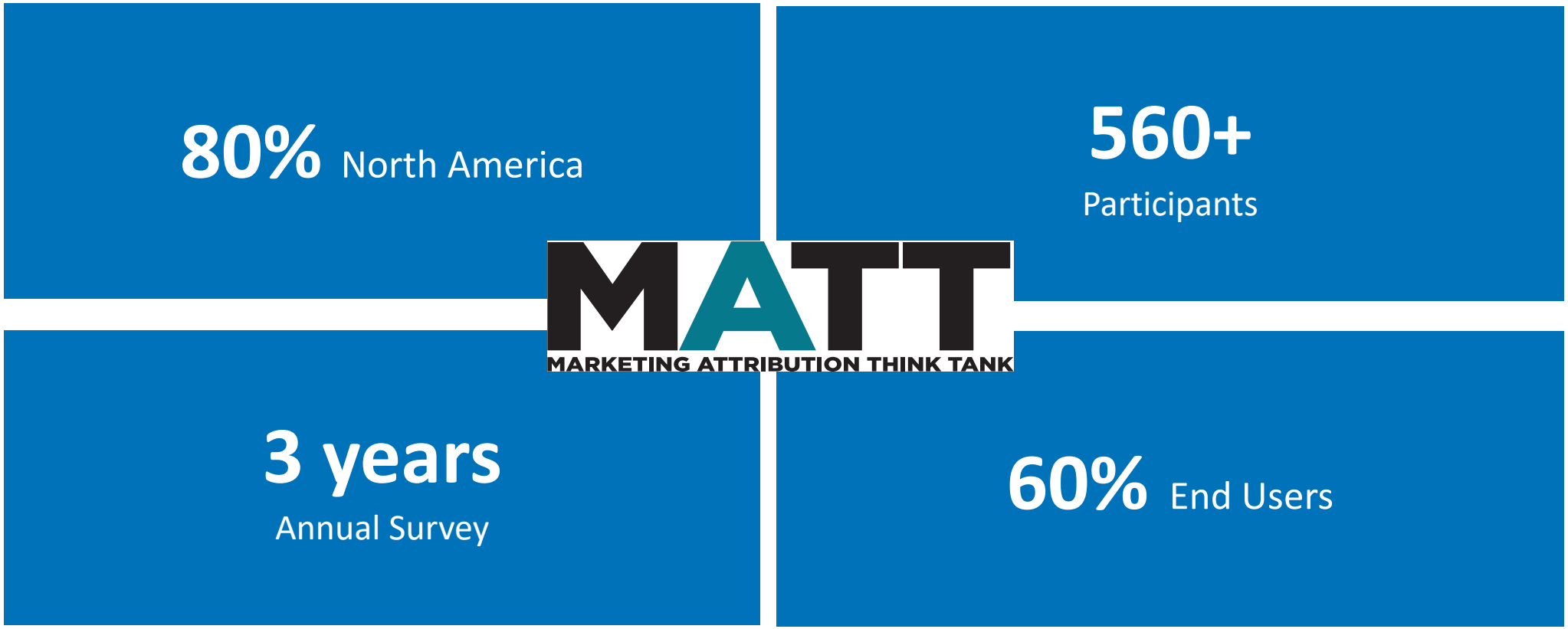
MMA

State of MTA 2018

Marketer Benchmark Survey results– Now online!
https://www.mmaglobal.com/matt

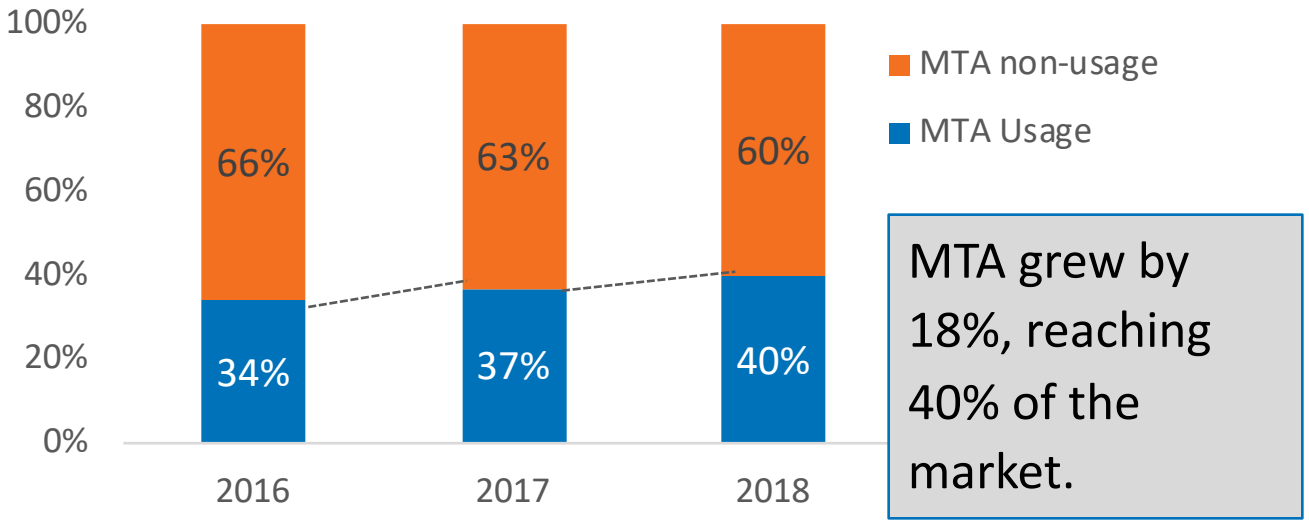


State of MTA Benchmark Survey

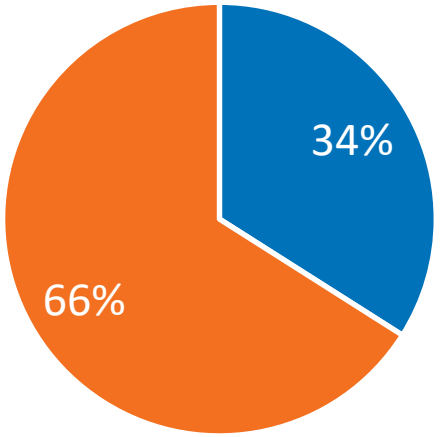


Confidential: Cannot be shared without permission from the Mobile Marketing Association

State of MTA – key findings from MATT's 2018 annual benchmark survey



MTA grew by 18%, reaching 40% of the market.



…Which equates to $31.4 billion* of USA ad spending.

Ad spend analyzed by MTA Non-analyzed ad spend

- For companies who have fully adopted an attribution process, 49% of their advertising spend is covered by MTA modeling.
- Among those companies who use MTA, an improvement of 9% in marketing ROI was reported due to their implementation of an MTA solution.

*$31.4=$237.7 (USA total ad spend) x 33% (% of the 2018 advertising spend impacted by MTA) x 40% (% of MTA users in the market)



Data sharing in the age of MTA, GDPR & Walled Gardens

White paper coming soon, MATT of the MMA

Walled Gardens: data restrictions and workaround strategies

Overall:

A walled garden practice is when publishers decide not to provide access to data about linking many types of ad exposures to conversion outcomes.

The paper provides a description of the blockages for data sharing that walled garden practices present, the problems these cause for MTA, and what effective workarounds might be.

Facts:

- User ID sharing has gotten tighter in a GDPR environment
- MTA providers vary in their permission to access certain data

Key parts of document:

1. General data sharing restrictions
2. Data sharing practices by publisher for MTA
3. Available workaround strategies

Confidential: Cannot be shared without permission from the Mobile Marketing Association

Limitations on MTA due to linkability issues

Limits data completeness

- MTA requires user-level analysis in order to get the right answers
- The ability to determine the effectiveness of ad serving is impaired as it cannot be properly analyzed

Limits accuracy

- Limits data on where and how frequently a converted user was exposed to messaging
- Provides biased attribution to trackable marketing events as compared to non trackable – creating an inaccuracy in contribution of one media versus another.

Workarounds Strategies

There are four response strategies -- which are not mutually exclusive -- for implementing MTA despite Walled Garden practices:

1. Go all-in with one of the publishers offering a clean room approach.
2. Switch ad servers to one that does not restrict IDs.
3. Use an MTA provider which can leverage an approved tagging system.
4. Create an ‘uber-model,’ combining the characteristics of MMM and MTA (and possibly A/B testing).

Data Sharing Practices of Top Media Companies for Independent Attribution Analysis

	Facebook	Google	NBC Universal	Twitter	Snapchat	Microsoft	Oath	Pandora	Amazon
BRIEF INTRO									
MEDIA CHANNELS									
Mobile Web									
Video									
Display									
Search									
In-App									
Video									
Display									
Search									
Desktop									
Video									
Display									
Search									

Data Sharing Practices of Top Media Companies for Independent Attribution Analysis

	Publisher A (PA)	Publisher B (PB)
MEDIA CHANNELS		
In-App		
Video	Not linkable	Depends on the app publisher and what they choose to expose. Some mobile ad servers/DSPs PB works with can also provide linkable ad serving information.
Display	Not linkable	Depends on the app publisher and what they choose to expose. Some mobile ad servers/DSPs PB works with can also provide linkable ad serving information.
Search	N/A	Clicks can be tracked if landing page by marketer set up properly
Desktop		
Video	Not linkable. PA does support click tracking, but user data is never shared	Tracking via approved tags or ad server logs that provide IDs for integration. Note: DCM plans to remove IDs sometime during 2019. PB can also provide logfile data with matchable IDs.
Display	Not linkable. PA does support click tracking, but user data is never shared	Tracking via approved tags or ad server logs that provide IDs for integration. Note: DCM plans to remove IDs sometime during 2019. PB can also provide logfile data with matchable IDs.
Search	N/A	Clicks can be tracked if landing page by marketer set up properly



2019 MATT

Looking into the future

MATT MTA Journey Map

Overall:

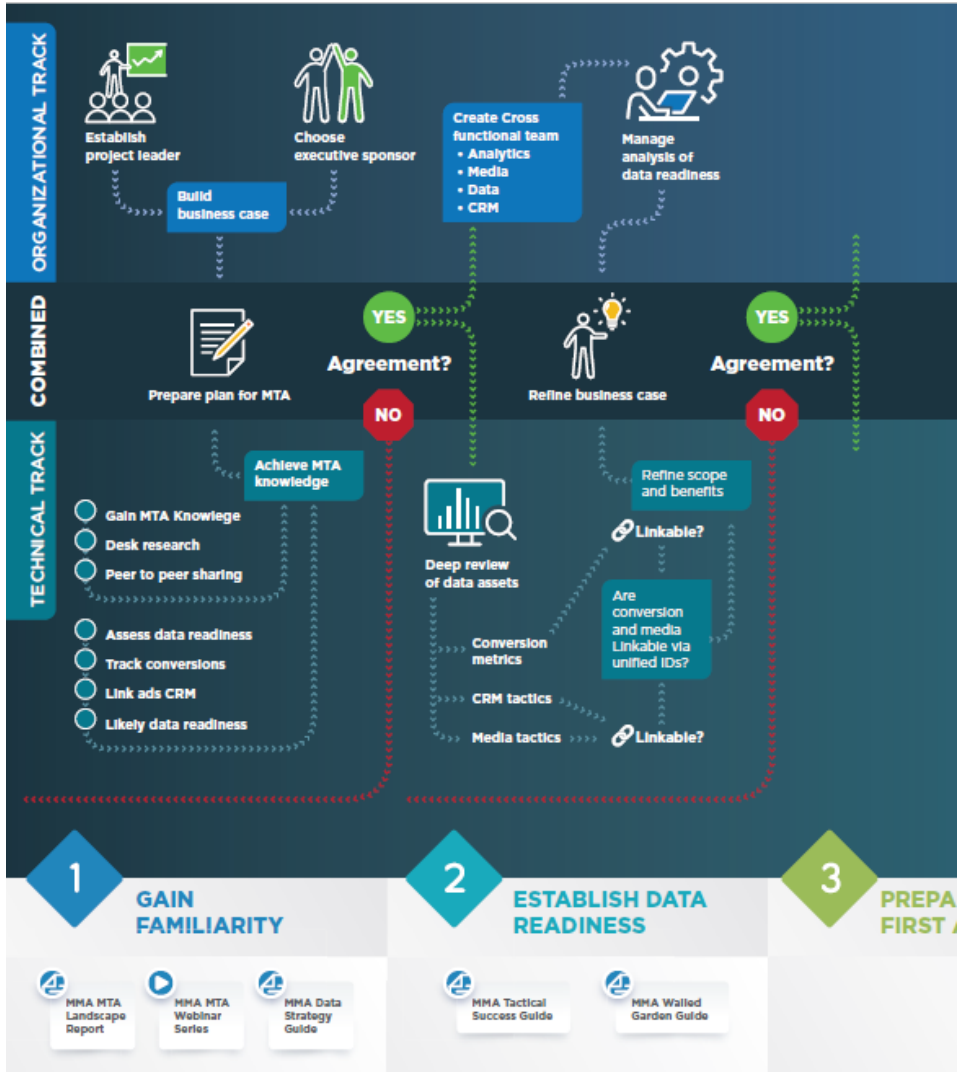
Identifies the challenges and obstacles marketers face in the MTA process, and maps out marketers' journey from the stage of gaining familiarity with MTA to the stage of successful deployment

- Only 40% of marketers reported some usage of MTA
- Only 13% of marketers reported being in the final stage of MTA successful deployment

Facts*:

Key part of document: Utilizing MATT deliverables

1. Details the steps where each of MATT deliverables can become handy
2. Provides an overview/guideline of the process required for successful MTA implementation



* Based on survey conducted in November 2018

The MMA is tackling one of the biggest issues in marketing today…

How to resolve the tension between performance and brand marketing

IS EFFICIENCY KILLING BRANDS?

By Simon White. Published on October 18, 2017.

AdAge

Digital marketing has unleashed an obsession with efficiency and short-termism, one that's trading long-term brand-building for short-term ROI. We've put the golden goose in a battery farm of scientific efficiency, and it's killing the brand, business growth and profit.

IS BRANDING "RAINBOWS & UNICORNS"?

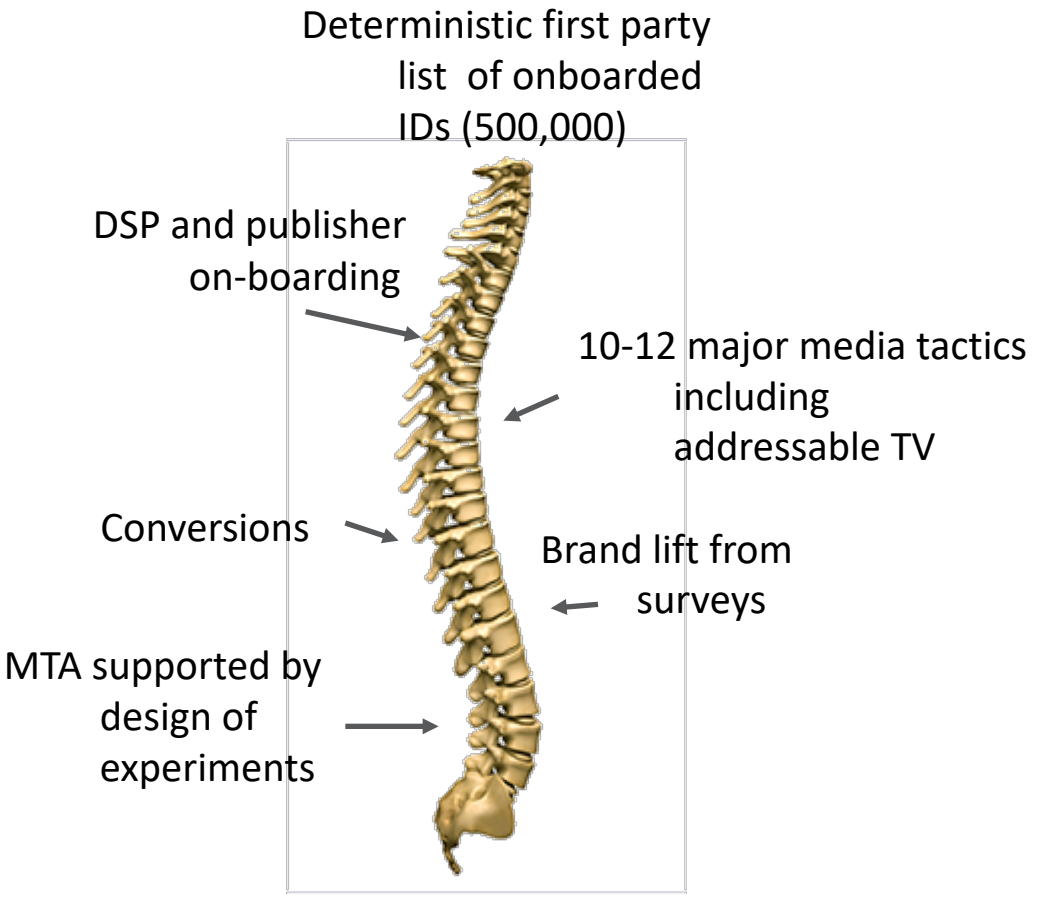
"Digital is about performance and delivers. Brand marketers don't have the same proof; it's like we're selling rainbows and unicorns because attribution models don't truly capture the contribution of the brand to the growth of the business!"

Major Marketer

MMA

Brand as Performance (BaP)

1. We will be conducting a series of deterministic studies
2. A number of publishers have signed up and committed to subsidizing much of the cost
3. Studies are expected to begin late second quarter
4. A couple of marketer slots still available



Quantify the full effects of brand building vs. driving performance over time…and understand the relative contribution of media tactics towards each goal

Confidential: Cannot be shared without permission from the Mobile Marketing Association

MMA MATT UNPLUGGED
FUTURE OF ATTRIBUTION
MAY 8, 2019 | NYC

REGISTER NOW

MATT Unplugged is a one-day event bringing together marketers, attribution experts and other thought-leaders to discuss and define the future of marketing measurement.

FEATURED SPEAKERS INCLUDE



MICHELE GARNER

Microsoft

Senior Data & Applied Scientist, Customer & Marketing Research



JOEL RUBINSON

Rubinson Partners, Inc.

MMA MTA Expert & President



AJ JOHNSON

TARGET

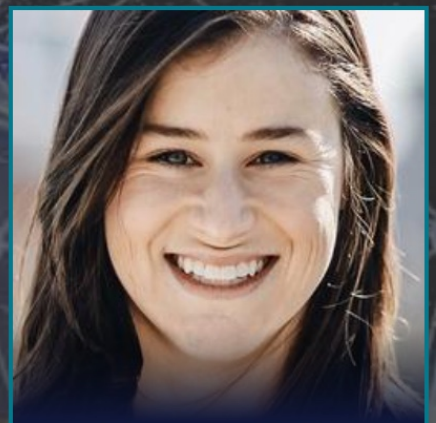
Sr Director Growth, Development & Measurement



HAIRONG CRIGLER PH.D.

Casper

SVP, Marketing Analytics and Data Science



SYDNEY FRIEDKIN

Chobani

Digital & Marketing Analytics Manager