Unbiased Research from the MMA to Assess the State of MTA

MTA IS DEAD, LONG LIVE MTA

MMA

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▪ Foreword

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> Think #MTA is dead? Think again.

"Think MTA is dead?"

If those words sound familiar, it's because you'll find this exact same statement in our most-recent 2021 State of MTA report, released earlier this year.[1] Much like these words themselves, the state of MTA is in fact a contradiction right now.

On one hand, 81% of marketers in North America are either using multi-touch attribution (MTA) or are planning to in the near future. However, on the other hand, only 40% of marketers have a formalized MTA solution in place.

While MMA believes in the power of MTA measurement, there has been a lot of negative press on its future given the challenges around the expected loss of signal, usually talked about in terms of cookie deprecation and restrictions to IDFA. The MMA thought it was time to do a balanced and thoughtful exploration of the real state of MTA.

To do so, we reached out to our marketer members and conducted in-depth one-on-one interviews to get their real-world perspective and learn about *their* MTA journey. You'll see their wisdom born from actual experience sprinkled throughout the report. We also asked MMA's esteemed group of experts (some of the best in the industry) of Vassilis Bakopoulos, Joel Rubinson, Lou Paskalis, and dare I include myself, along with our board member Neustar, a TransUnion company, for collective insights. Is MTA still marketing's best form of measurement, as the MMA Board proffered when we kicked off the Marketing Attribution Think Tank (MATT) five years ago?

We believe that while we are losing some signal, as the industry moves more digital, the fundamentals of MTA could be just as solid as when they were first introduced over 15 years ago by Rex Briggs.[2]

Even with these hurdles to clear, there are some solid reasons why MTA's time to thrive may now be here, including the accelerating move of linear TV to digital, proliferation of smart TV data, development of cohort measurements, and/or clean rooms and exciting cookieless solutions. "It will not be for the faint of heart", as Bank of America's Eddie Drake succinctly put it.

The bottom line is this. Contrary to the media's and others' desire to predict the ultimate demise for MTA, like the phoenix rising from the ashes, MTA might just come back even stronger.

But if marketers are to build true street cred with their CEO & CFO and the rest of the c-suite, it is vitally essential.

MTA is dead, long live MTA.

Greg Stuart
CEO MMA Global

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1 2021 State of MTA

2 I was CEO of the IAB at the time and backed Rex's work with a series of public studies. For more details: Briggs, Rex and Stuart, Greg. *What Sticks*. Kaplan Publishing. 2006

At Neustar, a TransUnion company, we've long been practitioners of multi-touch attribution. We see it in action every day, and we know it makes a meaningful difference in how our clients improve business outcomes across all their marketing investments. Thanks to MTA, they're laser-focused on the quality of their data, methodical in their media planning, and they're embracing agile principles to detect and seize new opportunities ahead of their competitors.

MTA was born many years ago with the high hopes of having always-on access to insights about how a marketing campaign was performing. Marketers had visions of real-time optimizations, with little to no human involvement, that would transform the way in which they bought their media.

The reality was that early MTA was often simple in its approach, naively allocated sales credit across only digital device touchpoints. When we launched Neustar MTA in those early days, we were one of the first true multi-touch solutions that captured the true impact of marketing touchpoints across the customer journey and incorporated non-marketing factors such as seasonality or competitive activity to provide a true view of the incremental revenue marketing was driving.

Fast forward to today, where threats of data deprecation, media fragmentation in traditional channels like TV, and the growth of walled gardens are threatening the advances we made in those early days. At Neustar, we have invested heavily in building a sustainable partnership ecosystem that puts privacy at the center of everything we do.

We've led the industry in privatized measurement innovations, including leveraging cohorts in our MTA solution, which open up visibility to vital parts of the media plan including both TV and the walled gardens. These advances are bringing to life those early promises of MTA with insight across key channels.

We believe in the future of MTA. It's why we teamed up with the MMA on the report you have in your hands. We were struck by some of their findings on MTA adoption earlier this year, and thought they'd be an ideal partner to expand on that research and provide us—and everyone else in the industry—with an objective picture of MTA's current prospects.

The insights you will find within outline the challenges and the benefits of standing up MTA and make a strong case for its future as a key part of the marketing analytics toolkit. And we look forward to continuing our part in that journey.

Michael Schoen
SVP and GM, Marketing Solutions,
Neustar, A TransUnion Company

Inaction Is Not an Option

> " With data deprecation and constant change on the privacy horizon, MTA will not survive in its traditional form. But consumers want personalization, and brands want to accurately measure the impact of their campaigns. That much hasn't changed. Thankfully, new advances like privatized data collaboration are making it possible to innovate and take MTA to the next level. It takes real commitment to lead the charge, and it's not for the faint of heart, but it's the future.

Eddie Drake, Bank of America

> " Some organizations are holding back on MTA because they fear the changes coming up in the marketplace. But we don't want to be sitting on our hands. We want to keep pushing, because we know that as we cooperate with our partners to explore cookieless solutions, we're going to learn a lot. And that's going to help us keep up with the changing times, outpace our competitors, and ultimately future-proof our business.

Bill Cramblit, Molson Coors

■ Introduction

Complete visibility over the consumer journey. Reliable scenario planning. Better buying decisions. Audience optimization. Real-time cross-channel insights. Who could resist the pitch?

Many marketers embraced MTA at a time of inflated expectations, as Gartner[3] would call it. Captivated by its promises, they underestimated the data, methodology, and cultural challenges of deploying it in their organization.

What followed is hardly a surprise: a precipitous fall into the trough of disillusionment.[4] And with walled-garden granular data increasingly harder to reach, Apple's recent IDFA changes,[5] and Google's decision to phase out third-party cookies,[6] the current technical and regulatory environment isn't exactly inviting either.

But while some analysts and vendors see the current deprecation of digital identifiers as a nail in MTA's coffin, others see it as an opportunity for MTA to finally overcome some of its most vexing challenges and deliver on its lofty promises. They can't both be right.

While pundits are debating the future of MTA, we decided to reach out to our members to get answers.

This report is based in part on findings from the *State of MTA* benchmark study,[7] an annual survey of marketing professionals that the MMA's Marketing Attribution Think Tank (MATT) has been conducting for the past five years.

More than 250 marketers answered the call for the 2021 edition of this important survey series, and we want to recognize their contribution to our industry's growing body of knowledge.

We also conducted one-on-one interviews with MMA members to get a more in-depth perspective of their experience with MTA and their vision for the future. We're immensely grateful for their time and insights.

Our goal with this report is certainly not to re-hype MTA. Early adopters learned the hard way that issues related to data management, methodology, and leadership buy-in can quickly derail any MTA project.

But a few recent developments are also promising to bolster MTA adoption in the coming years: the rise of CTV and the growing ability to measure all forms of TV inventory, breakthroughs in privacy-preservation techniques, and the emergence of identity as a unifying framework.

Let's dive in to see how all of those factors play out.

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3 The Gartner Hype Cycle (2015)
4 The Gartner Hype Cycle (2020)
5 VentureBeat: Apple launches the post-IDFA world to the dismay of advertisers
6 Google: An updated timeline for Privacy Sandbox milestones
7 The State of MTA, 2021 edition

CURRENT STATE

A Brief History of MTA

MTA sits at the confluence of three important movements: It came into its own in the early 2010s, at a time when digital channels (display, mobile, social, video, etc.) started to multiply, SaaS tools democratized big data, and models of customer centricity started to escape the halls of academia.[8] Consumer behavior was becoming much harder to pin down, but here was a brand new approach that promised to wrangle all of that complexity into a neat formula, and help marketers optimize their cross-channel campaigns at the touch of a button.

The first wave of MTA deployments came up short: among existing users today, 43% have tried it before and failed.[9] We'll review the main reasons why in Part II of this report. But what about the fundamentals? Was everyone wrong to embrace MTA as a framework?

We're long past the point where marketers saw people as aggregate markets rather than individuals. Today, consumers expect personal attention from the brands and publishers in their lives,[10] and proactive CEOs see it as an opportunity to transform the way they do business.[11] But to deliver that personalized experience, marketers need to understand who those consumers are, what they like, and where to reach them. They want to connect with them at the most strategic moment in the customer journey, and they certainly don't want to put them off with duplicate or off-sync messages.

That's why MTA remains as relevant today as when it was first introduced. It offers a formal framework to examine the contribution of key touchpoints on the path-to-purchase, not just the last touchpoint or the easiest to measure (see the sidebar: *MTA is like Olympic Skateboarding*). To anyone serious about letting data drive their cross-channel media allocations, not the other way around, MTA is a must-have.

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> **Thematically, the customer experience is in everything we do now. We've shifted our perspective from the sale of products and services to the needs of the individuals who consume them. The personalized continuum is a source of competitive advantage. Those who understand consumer intent and appeal to their interests responsibly will always come out ahead.**
>
> *Eddie Drake, Bank of America*

8 See The Great Debates for a thorough review of today's most promising frameworks
9 MMA: The State of MTA (2021 edition)
10 McKinsey: Personalizing the customer experience (2020)
11 Accenture: An experience renaissance to reignite growth (2021)

MTA Adoption Over the Years

Today, 40% of marketers say that they use MTA (see figure 1). That figure is lower than it was in 2019 (45%), but on par with 2018 (41%). Less than 20% are on the fence, and the remaining 40% are working on it (30% within a year, and another 10% within 18 months).

Considering the recent disruptions in the market and all the uncertainties associated with the ebb and flow of the COVID-19 pandemic, interest in MTA has remained remarkably constant.

> **Reach or outcomes? There shouldn't be a debate: it's both. We measure both at GM because we want to drive awareness—especially now with electric vehicles—but also get consumers behind the wheel, of course. MTA is a critical component in our measurement arsenal because it allows us to look at all the important metrics and find opportunities to improve how our customers experience our brands.**
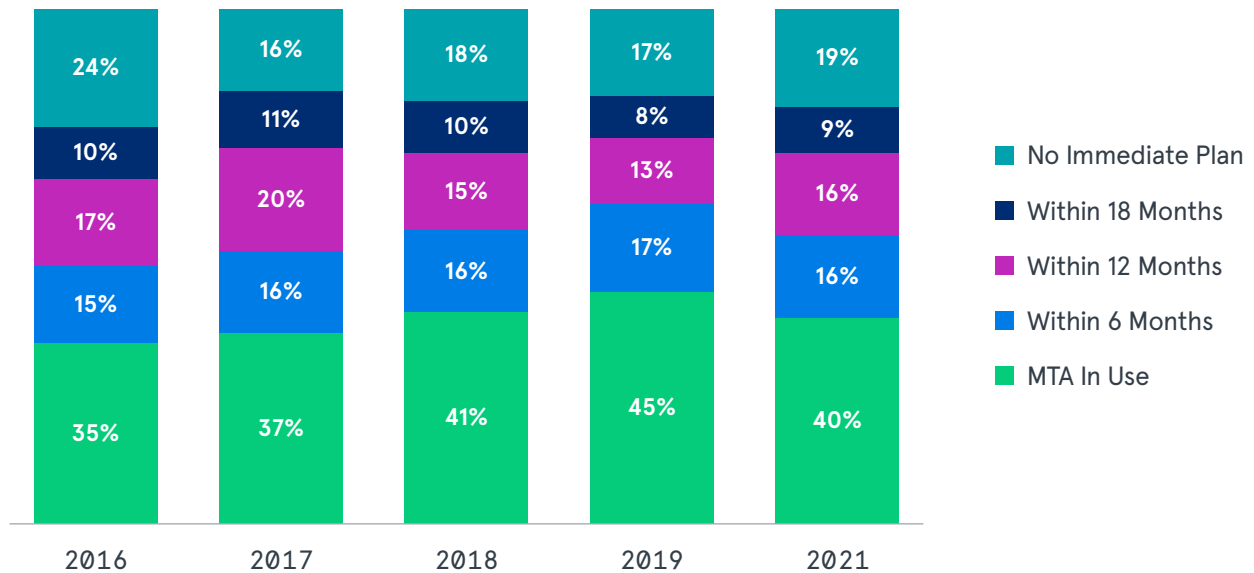>
> *Hardy Faison, General Motors*

FIGURE 1: MTA adoption remains stable over the years[12]

12 Source: MMA State of MTA

MTA IS LIKE OLYMPIC SKATEBOARDING

At the Olympics, some sports like swimming, bobsledding, and track and field are easy to score. There's a sensor in the starting blocks, a line-scan camera at the finish line, and whoever crosses the line first wins the race. But there are other sports where the scoring system can be a bit baffling to the casual viewer.

Take skateboarding, one of the exciting new sports added to the Olympic roster in Tokyo. We know that skaters have less than a minute to show their best stuff, and that they get a score out of 100 at the end of their run. But where do those scores come from? How much is a kickflip indy worth, or a backside tail slide, or a stale fish 540? What are those things anyway? Is it better to do them at the beginning of the run, or at the end? Spread out through the routine, or back to back? How do amplitude, style, and flow factor in?

There's a lesson in there for marketers. The customer journey is very much like a skater's run at the Olympics. It's a collection of touchpoints, each with its own tactical and creative qualities. No two journeys are alike, but if the sequence is right and harmonious for that consumer, it all adds up to a top score: a purchase, a membership signup, a site visit, an app download—whatever the brand's favorite outcome might be.

The scoring algorithm can be a bit mysterious to the non-initiated, but like judging at the Olympics, it's based on hard data and robust methodology. Marketers know that to be fair to their marketing investments, they need to take the holistic view.

Last-touch attribution has its value, but gold medals don't go to athletes based on the last trick they do before the buzzer, do they?

TOP OBSTACLES

Earlier in this report (figure 1), we learned that about 40% of marketers are using MTA in any given year, and that another 30% are planning to do so within 12 months. So why are we not seeing a 70% adoption rate the following year?

Between false starts, roadblocks, delays, and other shifts in priority, there's no shortage of ways that an MTA project can get derailed. In gathering data for this report, we found that the top points of failure tend to gravitate around three key areas: **data** (quality, access, and linkage), **methodology** (discrepancies between measurement solutions), and **organization** (silos and leadership support).

Figure 2 shows the relative importance of each of those broad problem areas and how they intersect. It's apparent that data-related issues are the top hurdles, but they're certainly not the only ones. While 89% of respondents said they experienced data issues on their way to MTA, just 22% had data issues only. Two-thirds of all respondent (67%) had data issues compounded by organizational and methodological issues.

It's hard to tell whether poor data leads to poor organizational alignment or vice versa, but it's clear that any progress with those two is likely to go a long way towards resolving issues with methodology.

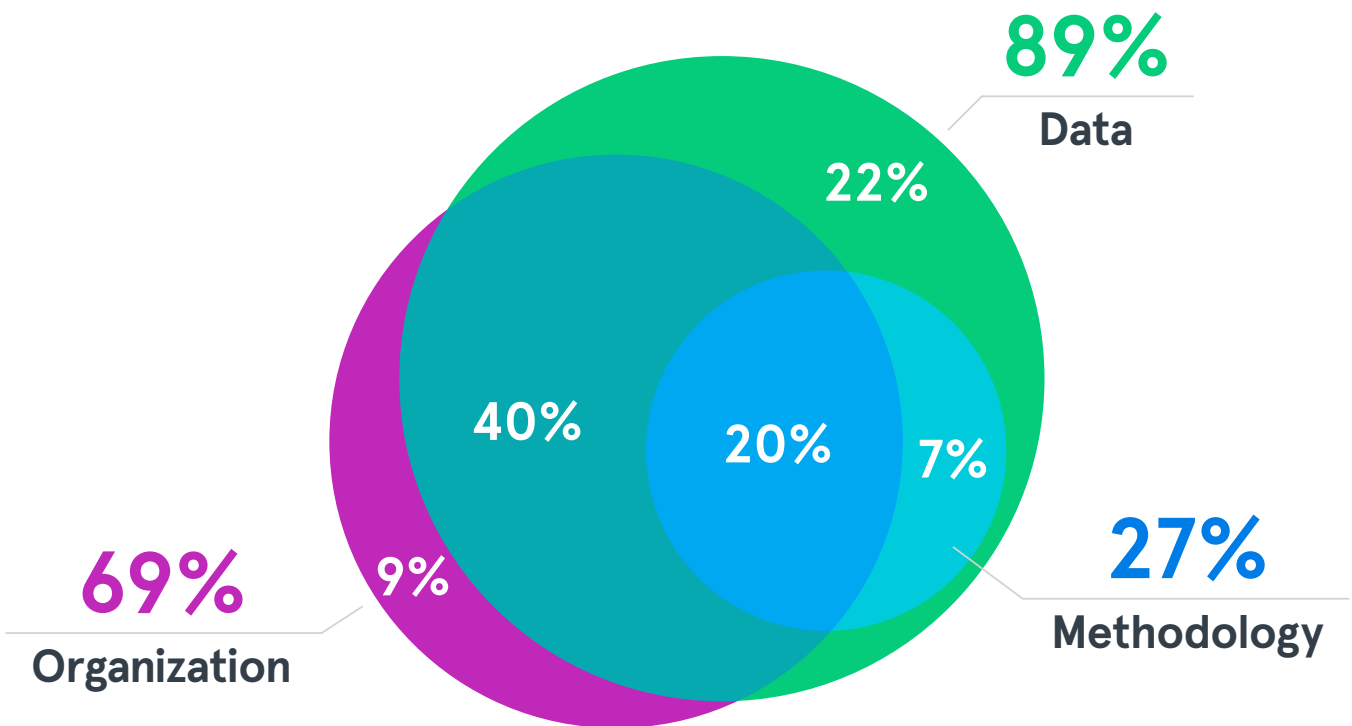Let's review these three key problem areas one by one.

FIGURE 2: Key obstacles to MTA adoption[13]

13 How important is it to find a solution to each of these problems on your MTA journey? Source: MMA 2021 State of MTA

Persistent Issues with Data

It's not surprising to see data at the top of the list. In the 2021 edition of our *State of MTA* survey, nearly every respondent (89%) said they experienced data issues of one type or another:

Data quality: 56% said they couldn't entirely trust the quality of the data supporting their MTA models.

Data access: 50% said their MTA program suffered from privacy restrictions and poor access to the walled-gardens.

Data linkage: 40% had trouble connecting data across devices and platforms, and linking it to their CRM.
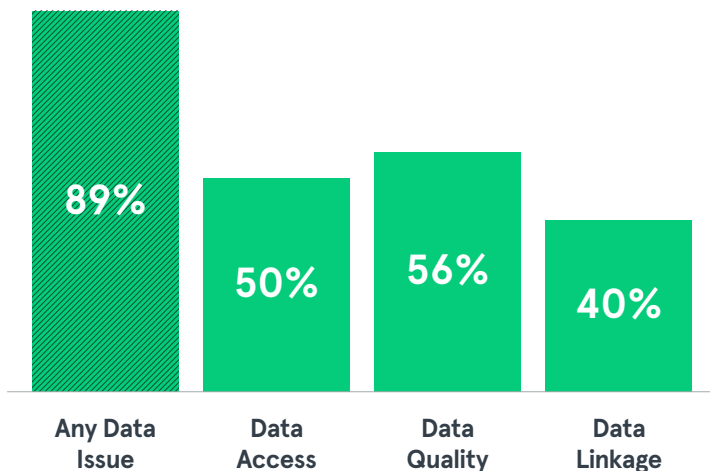
FIGURE 3: Top data-related issues impeding MTA success[14]

14 Source: MMA State of MTA (2021)

> Our first-party data comes from our dealers and from our direct relationships with customers, and it's very rich, but building a bridge between that data and third-party data is always a big challenge.

Hardy Faison, General Motors

> How do we get consumers to opt in and share their data with us? What's the value exchange? At Bloomberg Media, we're very intent on building up our first-party data collection efforts in the months and years to come because we want data we can trust.

Collier Hammons, Bloomberg Media

Customer data is the life force of modern marketing, but in today's fast-paced and fragmented environment, it's hard to keep track of all the pieces of the puzzle and get to the big picture. Consider these additional alarming datapoints:

Duplicates: 20%-40% of all CRM records turn out to be duplicates.[15]

Data systems: only 8% of marketers operate in a data environment where all relevant consumer data is centralized and easily accessible for all employees in the organization.[16]

Breadth and depth: only 3% of senior marketers estimate that their consumer data has sufficient breadth and depth to drive sophisticated decisions.[17]

Data management tools are supposed to help, but companies don't always retire old tools when they acquire new ones. The end result is a bloated marketing stack with leaky match rates between systems. In a recent post,[18] Neustar described the case of a client that started out with a CRM database of 100 million records and ended up with only 20 million usable records after its data had traveled through only a handful of analytics tools.

Data issues are the bane of data science teams who spend nearly as much time cleaning up and preparing data as they do modeling and analyzing it.[19]

> **We see it play out over and over again. When a new channel becomes available, the new data is often missing some critical fields to connect to existing data, or it's adding new fields that don't fit the company's existing schema, or it can't be collected at the same cadence, or validated with the same level of accuracy. Whatever the reason, more often than not, the company ends up with a new data silo.**
>
> *Steve Silvers, Neustar, A TransUnion Company*

15 IBM
16 MMA: The State of consumer data readiness in marketing
17 ibid
18 Neustar: Why would you use leaky buckets to handle your precious customer data?
19 Anaconda: The state of data science 2020

Methodology Discrepancies

Today, companies that use MTA also use marketing mix modelling (MMM): 63%, and A/B Tests: 59%.[20]

On paper, they should all pull in the same direction and tell a consistent story. After all, they share a common objective: to measure the ROI of marketing and help a brand improve how it allocates its media budget.[21]

Historically though, MMM, MTA, and A/B Tests have offered very different approaches to the measurement of marketing performance. At many companies today, the data inputs are different, the timing and outcome metrics are different too, and the teams that are responsible for them aren't always the same either. Too often, their respective results are at odds with one another.

To complicate matters, "analytics firms that specialize in these techniques have tended to do one, but not the other, with the result being that claims are tainted by self-interest," as Scott McDonald, CEO and President of the ARF, pointed out in an op-ed for Forbes a few years ago.[22] "They treat what they do as very secret intellectual property. Isn't it ironic that a marketer's quest for transparent evidence of ROI leads to reliance on a black box?"

> **"**
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> I think we've begun to understand which signals to trust and which not to trust, and that's exciting. But many of our measurement tools still don't talk to one another, unfortunately. So we are leading a project right now to break down those walls and fix the problem. It's not easy, but you can't keep operating in vacuums.
>
> *Bill Cramblit, Molson Coors*

> **"**
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> We're using MTA to allocate media within and between addressable channels (including direct mail and email), and to optimize individual campaigns. And MMM and MTA are used in conjunction with more qualitative tools to get the full picture. Reconciling output from all those models is one of our toughest challenges.
>
> *George Wu, AT&T*

20 Source: MMA 2021 State of MTA
21 For a quick side-by-side review of MMM, MTA, and A/B Tests, check out this summary by Think with Google.
22 Forbes: Measuring the ROI of marketing

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The picture is not quite as bleak today as more vendors are offering unified measurement solutions now where MMM and MTA feed off each other in a virtuous loop, and where strategic and tactical considerations can finally be reconciled. Modern vendors are also much more transparent about the whole process than their predecessors.

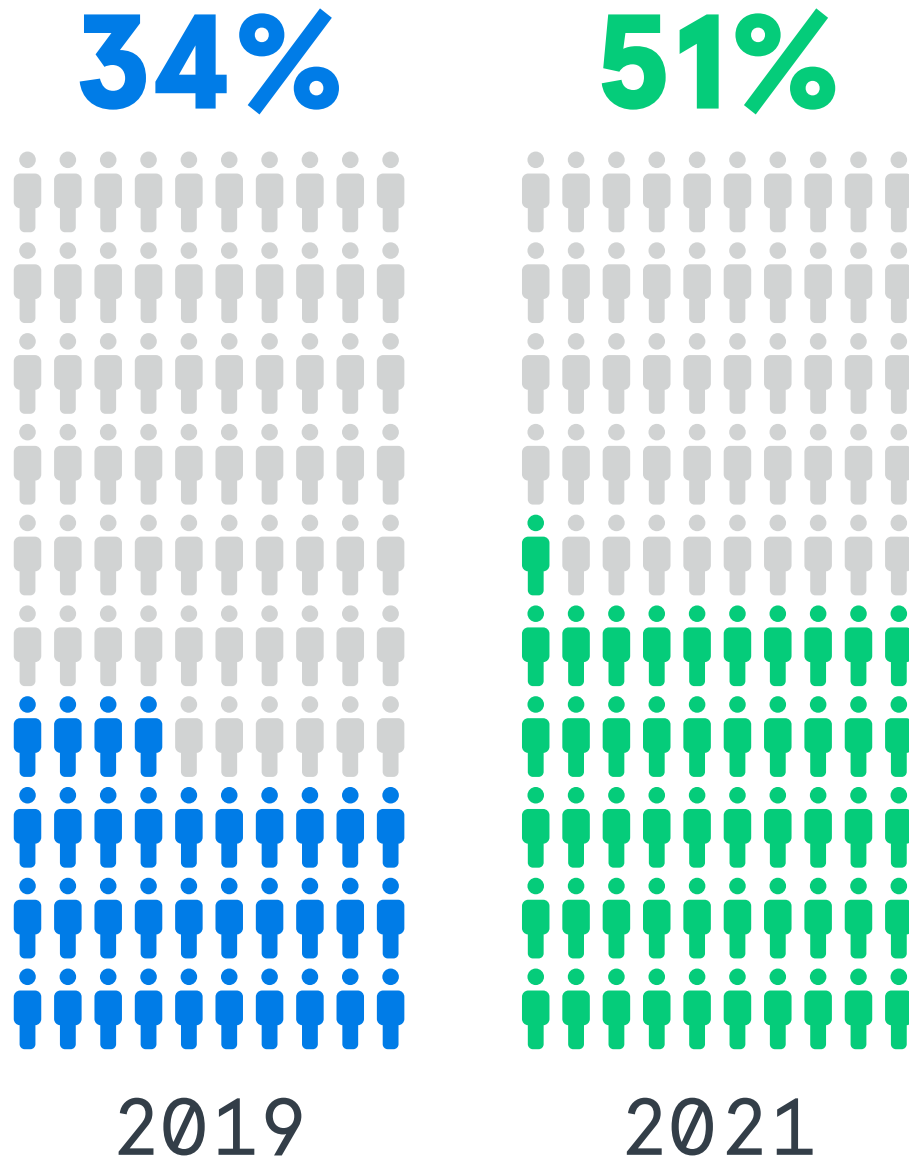Marketers are starting to respond, as figure 4 illustrates.

FIGURE 4: Percentage of marketers in North America interested in learning more about integrating MMM and MTA[23]

23 Source: MMA 2021 State of MTA

> We historically have used Last Touch Attribution (LTA) at Bloomberg Media. With ID deprecation on the horizon, MTA as a standalone solution is off our radar at the moment, but we definitely have our eye on MTA offerings that are part of a unified solution with MMM. We're bullish on a combination of the two that could be a big improvement over what we've used in the past and today.

Collier Hammons, Bloomberg Media

> The winning framework is a sophisticated mix of fractional attribution (MTA), econometrics (MMM) and experimentation. It takes commitment and persistence to find the proper balance. It takes strong partners as well. But it's ultimately your job to convince your counterparts that there's an opportunity cost in doing business as usual. Open the eyes of the team, and together you can achieve a real cultural shift.

Eddie Drake, Bank of America

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Silos and Limited Leadership Support

Despite having been around for more than a decade, MTA is still often perceived as the new kid on the block.

To this day, MMM and MTA are often described as opposites: MMM is long term and strategic, whereas MTA is short term and tactical; MMM is better for traditional channels, MTA for digital channels; MMM works with aggregate data, MTA with user-level data. There's some element of truth to all of this, but rather than using those distinctions to find synergies, many marketing organizations are using them to draw up battle lines. And in hand-to-hand combat for marketing dollars, MMM often wins out because it's been around for much longer and already enjoys support within the organization.

Teams looking to develop MTA capabilities fight a battle on another front too: Incumbent teams responsible for legacy channels tend to be protective of their own turf, and they often rely on point solutions, and metrics, that make their channel look good. MTA is a threat to point solutions because it offers an impartial assessment of the platforms that work best for any given campaign. No preferential treatment to one channel or another.

As if the prospect of dysfunction within the marketing organization itself wasn't enough, MTA projects can create friction with other departments at the company.

With privacy and data security concerns rising to the top, legal departments are increasingly involved in marketing decisions. The technical complexity of the marketing stack is drawing more involvement from IT and analytics departments too. And operations teams might hold the key to critical pieces of customer data as well.

Neustar recently commissioned Forrester[24] to gauge what level of cooperation—and distrust—marketers were facing across corporate functions. Nearly 40% described their relationship with their counterparts on the analytics team in negative terms (10% even described it as 'strained'), and more than half said they regularly squabble with their privacy team.

So MTA has to prove its worth twice: in the field, and in the boardroom. It can be a vicious circle. Without leadership support upfront, you're unlikely to break organizational silos. With organizational silos still in place, you're unlikely to address data issues. With data issues getting in the way, you're unlikely to succeed, even if you've narrowed down the scope of your MTA project to a single brand, a single geography, or a subset of channels and outcomes. And if you don't prove that it can work with a starter project, your funds and leadership support will dry up real fast.

24 Forrester: How to win at customer data management and drive business growth

Are things getting better?

Figure 5 shows that 29% of MTA prospects have a hard time proving the value of MTA to the decision-makers in their organization, a substantial jump from 20% two years ago. And 26% are currently being hampered by lukewarm support from their leadership, compared to 19% in 2019.

Clearly, organizational support remains an important obstacle to MTA adoption. But marketers we talked to shared some encouraging recent developments:

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> **MMM previously sat with the Analytics and Forecasting group and MTA with the Marketing group. Both functions will fall under Marketing moving forward. We work with outside vendors and numerous media agencies linked to specific media objectives and nameplates in our portfolio. We all work well together, but it's a lot to manage.**
>
> *Hardy Faison, General Motors*

2019   2021

19%   **26%**

Not enough support from management

20%   **29%**

Not enough evidence to justify investment

FIGURE 5: The hurdle keeps getting higher. Key leadership issues getting in the way of MTA adoption for prospective users[25]

25 Prospective users are those looking to use MTA within 6-18 months. Source: MMA 2021 State of MTA

PART III:

NEW ADVANCES

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In the previous section of this report, we saw how issues related to data, methodology, and organizational alignment weighed heavily on the teams tasked with deploying MTA capabilities. Those obstacles won't magically disappear simply because third-party cookies are on the way out. There's no shortcut: Marketers need to take a hard look at where they stand, and invest time, resources, and energy to address any weakness in those key areas.

But there are new developments in the industry that, we think, should provide marketers with some extra incentive to press ahead:

- **TV** is finally becoming addressable, adding an important new dimension to MTA initiatives;

- **Privacy-preserving techniques** are transitioning from the lab to the marketplace, making it possible to address privacy concerns and build a bridge to the walled-gardens;

- **Identity** is emerging as a crucial unifying framework to glue it all together in the post-cookie world.

Let's review those advances in more detail.

TV Is Becoming Addressable

The relationship between TV and digital has been one of love-hate ever since AT&T enticed HotWired.com visitors with their "You Will" campaign to "click your mouse right here" on the first-ever banner ad, back in 1994.[26] An amazing 44% of them played ball and ended up on a landing page that welcomed them with an incredulous "You did!"

Two camps developed over time: digital vs. TV, targeting vs. reach, outcomes vs. brand building, Google Display Network vs. the Super Bowl, programmatic vs. upfront negotiations. And on the modeling side, MMM was a better fit for TV than MTA because TV data was only available in aggregate form, not at the user or household level. But streaming, AVOD, and other forms of addressable TV are quickly changing the equation.

To be fair, TV has been addressable for years. As part of their network carriage deals, MVPDs have targeted their subscribers with two minutes' worth of local and regional ads every hour for as long as addressable set top boxes have been around. But that's nothing compared to the explosion of addressable ad inventory that's about to be unlocked by today's new TV infrastructure. Advertising spending on CTV alone grew by 40% in 2020, for example, and is projected to rise another 49% in 2021.[27]

Just as ID deprecation is casting a shadow on first-generation MTA solutions, TV is giving marketers a reason to stick around. CTV advertising doesn't use third-party cookies, and with the right MTA partners, marketers can start integrating TV attribution into their omni-channel campaigns without fear that their investments will be short-lived.[28]

That's a big shot in the arm for MTA, and a chance for marketers to demand more accountability from all the media companies they work with. It's also a chance for those media companies to manage their various video ad assets (on linear TV, OTT, AVOD, FAST, etc.) much more cohesively.

Radha Subramanyam, President and Chief Research and Analytics Officer at CBS, captured the sentiment in a recent industry panel: "There are many valuable initiatives going on right now [in cross-platform marketing measurement]," she said, "and we can finally have the TV industry participate in a meaningful way. When we write the history of television, we will look back and really see this as a fundamental turning point."[29]

> **"**
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> **How do we get consumers to opt in MTA is tough. It's our third try now. Third time's a charm, right? One of the key differences this time around is that we've found a way to pull in more non-digital data. TV is such a big part of how we do marketing: we use it to do things like tell our brand story, introduce new models, or draw attention to our dealers at key moments throughout the year. Marketing is not all about down-funnel actions, like scheduling a test drive or closing a sale.**
>
> *Hardy Faison, General Motors*

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26 The Atlantic: The first-ever banner ad on the Web
27 eMarketer: CTV is one of the fastest growing channels in 2021
28 iSpot.TV and Neustar: The future of TV is now
29 TVOT Live Panel: The way forward for cross-platform measurement

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Advances in Privacy- Preserving Techniques

Walled gardens have had their own love-hate relationship with advertisers too. It's no secret that the large walled gardens are drawing the lion's share of digital spending these days.[30] But accountability is an issue: These platforms are grading their own homework, for the most part, and user-level data cannot be exported. It's near impossible to cross reference a Google campaign with a Facebook campaign at the user-level, for instance, or to easily connect it to an outbound email campaign.

Clean rooms[31] are part of the answer. In a secure and privacy-preserving environment, marketers and publishers can use those platforms to share data and run analyses without running the risk of ever exposing the other party's raw data. It can be a burden for marketers to manage separate clean rooms for every publisher they're working with, but it's a great way for brands in heavily regulated industries to capitalize on their first-party data.

Another promising development is around privatized measurement. You might have heard of k-anonymity: a technique where individuals are grouped into cohorts (of size k) that are large enough to preserve the privacy of those individuals, but also small enough to produce actionable insights. Or private model calibration: a technique that adds random noise to the modeling process to prevent reasonable attempts at user reidentification.

In a recent research paper published in I-COM's Frontiers of Marketing Data Science Journal,[32] Neustar's SVP of Data Science, Robert Stratton, put leading privacy-preserving techniques to the test and shared some much-needed insights on the impact that those techniques might have on MTA results. In an MTA simulation with one million records and cohorts of 10,000 people, they found an attribution bias of only 1%.

In other words, privacy preservation is a marketer's best friend when it comes to working with walled gardens and other publishers today. No sensitive data gets out, but feedback at the cohort-level can be used to attribute outcomes to the platform with high confidence.

Today, the average company uses MTA to analyze 31% of its media.[33] This has hovered around the same level for many years, but with TV and walled gardens finally in the loop, we believe this is about to change.

That's where unified identity comes in.

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> **With ID deprecation, solutions rooted in privacy-preservation, including cohort-based approaches and clean room technologies, are a lifeline to maintain access to granular user insights. But they're more than that: they make it possible to have tighter co-marketing opportunities between brands, and closer media integrations with publishers of all types, all in a privacy-safe way. That's a game changer for MTA.**
>
> *Marc Vermut,*
> *Neustar, A TransUnion Company*

30 eMarketer: Duopoly still rules the global digital ad market
31 Forbes: Can data clean rooms be the answer for privacy-safe marketing?
32 Neustar: Privatized machine learning for marketing analytics
33 Source: MMA 2021 State of MTA

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Identity As a Unifying Framework

Identity is a hot topic in marketing circles these days. Everywhere you turn—the trade press, industry conferences, your favorite podcast, LinkedIn—you'll find someone talking about identity as a replacement solution for third-party cookies and device IDs. But we think it's important to untangle 'identity' from 'identifiers.'

Old identifiers (like phone numbers and email addresses) are still around. Third-party cookies too, and they've just received a reprieve until late 2023. On the mobile front, IDFA opt-in rates started out alarmingly low when iOS 14.5 launched in April 2021, but they've been rising ever since, as app companies are becoming more adept at communicating their value proposition and securing consent. We're not talking broad adoption (according to Flurry,[34] opt-in stands at 21% worldwide and 15% in the US as of mid-Sep 2021), but we can't say that IDFA is dead and gone either.

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> **Like many others, we're concerned about the repercussions of ID deprecation and privacy regulations on the way we run our marketing operations. But those hurdles aren't derailing our ambitions for MTA and holistic measurement.**
>
> *Micah Davis, Hallmark*

Today's ID world is a jumble of 'hard' offline identifiers (like emails and phone numbers), digital identifiers (cookies and device IDs), and new digital ID solutions (like UID2, ID5, or Neustar Fabrick ID).[35] The MMA recently organized a series of webinars to introduce its members to many of the top contenders. Those sessions are archived[36] for your reference, so take a listen when you have a minute.

But while identifiers are important, identity goes far beyond IDs. Identity is a unifying framework, not a technology solution. It's a way for marketers to verify that the data they use is accurate (via identity resolution), to enrich that data through reliable outside partnerships, and to activate and optimize their marketing programs across all channels, online and offline. It's also a unifying framework for their organization, helping to break down not just data silos, but corporate silos as well.[37]

It's very likely that after cookies and device IDs are gone, every brand's next generation marketing ecosystem will be built around a cocktail of integrations and identifiers,[38] not a single solution, to maximize campaign performance. While the technical underpinnings are going to get more complex, unified identity offers marketers and their partners the framework they need to bring it all together and instill trust in the new ecosystem.

There has been some progress in the marketplace already. Martech vendors are stepping up to the plate, and marketers are starting to recognize the value of identity as a unifying force across the full length of their marketing programs. This bodes well for the future of MTA.

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34 Flurry: iOS 14 opt-in rates since launch
35 Prebid.js: User ID module
36 MMA: The Great Identifier Debates
37 Neustar makes a detailed case for it in a recent paper: The Future of Identity
38 Those may include direct integrations, cookieless universal IDs (like UID2 or Fabrick ID), contextual, cohorts, or clean room solutions.

The Outlook for MTA

The industry developments discussed above mean more data to manage, and more investments in technical capabilities and strategic partnerships in the short term, but the big payoff is that they can help marketers address some of the tough challenges we reviewed in Part II of this report.

Figure 6 provides a summary of how some of MMA's members are already using those key developments to redefine how they do MTA and measurement in general.

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> **We went through a lengthy process to select our MTA vendor. We wanted to make sure we selected a vendor that was a leader in identity, and that understood what it took to deliver a truly unified solution. We didn't want to struggle anymore with MMM saying one thing and MTA saying something different.**
>
> *Hardy Faison, General Motors*

> **"**
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> **MTA is still one of our best tools to measure true media performance long term, and with a degree of accuracy that a company can really trust. But don't underestimate the amount of time and energy it takes to get it set up properly.**
>
> *George Wu, AT&T*

TOP OBSTACLES

DATA	METHODOLOGY	ORGANIZATION

NEW ADVANCES

TV ADDRESSABILITY

Enhance Scope
more channels, and better opportunities to measure upper-funnel outcomes

Bridge to MMM
broader view of the consumer journey, and a bridge to MMM and other TV measurement capabilities

Align with TV Teams
better alignment with internal TV teams and outside agencies

PRIVATIZED MEASUREMENT

Enhance Scale
access to privacy-compliant data and cohorts from more partners, including walled gardens

Bridge to Walled Gardens
use of cohort data to enrich first-party data and boost cross-channel activation performance

Align with Other Marketing Teams
opportunities for better cross-channel collaboration between internal brand and media teams

UNIFIED IDENTITY

Enhance Trust
better identity resolution and more streamlined systems to prepare for data deprecation

Bridge to Martech Stack
less bias and more visibility across the marketing stack

Align with Teams Outside of Marketing
common language and outcome metrics, improved collaboration with departments outside of marketing
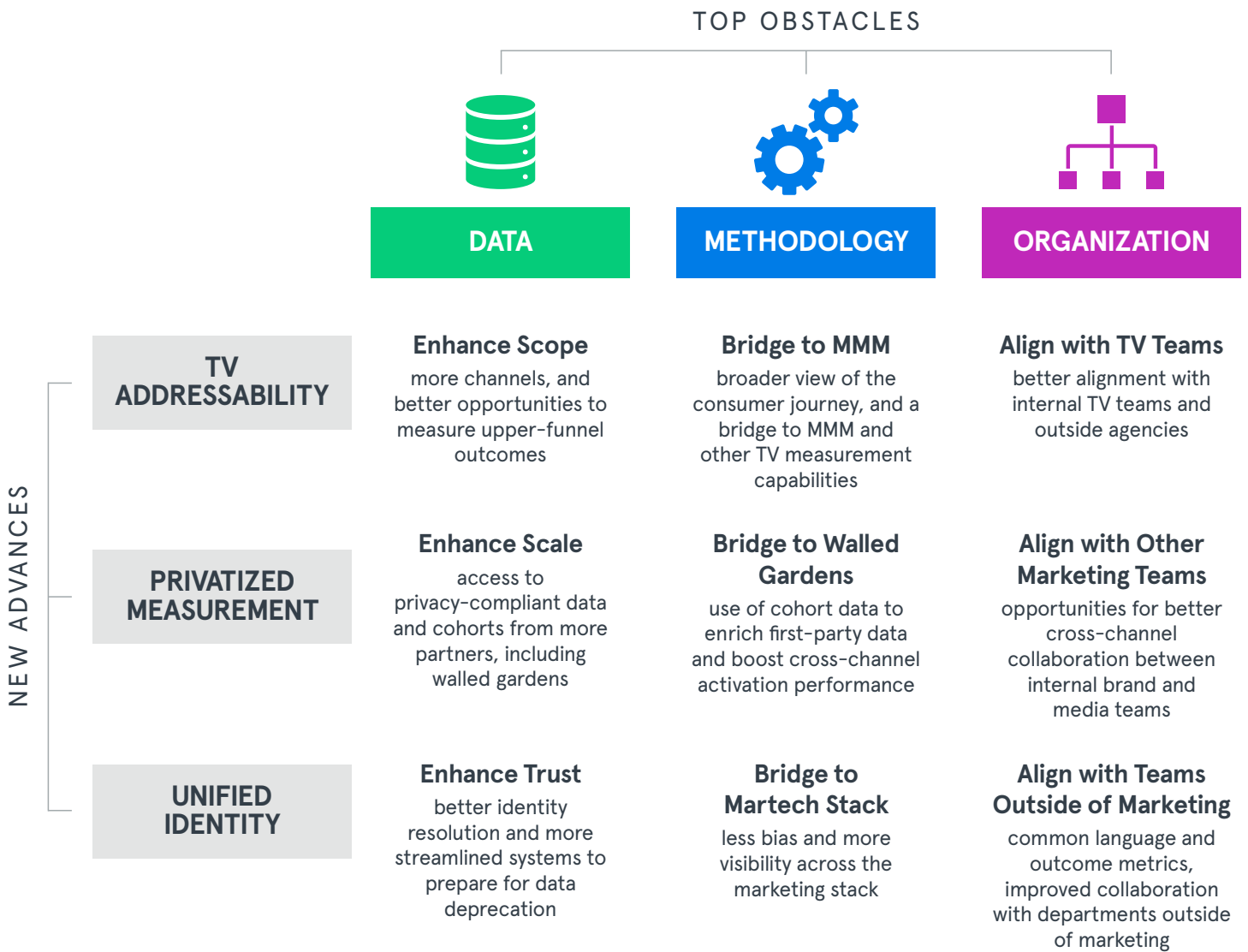
FIGURE 6: How recent developments are improving MTA's outlook by helping address challenges related to data, methodology, and organizational alignment

BEGIN YOUR JOURNEY

Pearls of Wisdom

We hope this report provided you with the background and insights you needed to separate hype from reality on your MTA journey.

There's no question that MTA is hard. We heard it in those exact terms in every interview for this report, and we've seen it first-hand in our engagements with our members over the years. Issues related to data, methodology, and organizational buy-in are key obstacles that cannot be ignored. But despite all the headlines to the contrary, MTA isn't dead. It's still the best framework to understand the consumer journey in all its glory and provide objective input to activate and optimize today's cross-channel campaigns. Marketers haven't turned the page—far from it.

And with TV now in the picture, privatized measurement, and identity to tie it all together, we firmly believe that MTA's best days are ahead of us.

We leave you with these additional pearls of wisdom to guide you on your journey to successful MTA.

DATA

KEEP PACE WITH YOUR BUSINESS

In today's world, data needs to move fast to be useful. Business leaders want results now, not tomorrow. Make sure your data pipeline and overall data governance are up to the task.

George Wu, AT&T

GET DATA GOVERNANCE RIGHT

The environment we operate in is much more fragmented than it used to be, and we need guardrails in place to ensure that all the data gets stitched together properly. Data governance plays a big role in helping an organization deliver a better consumer experience.

Micah Davis, Hallmark

DEVELOP FIRST-PARTY DATA

We're in a period of uncertainty. Hopefully the industry will rally around a common cookie-replacement solution. We'll see. But in the meantime, you should definitely build up your first-party data. You want people to raise their hand and tell you who they are, what their interests are, and what drew them to you in the first place.

Collier Hammons, Bloomberg Media

METHODOLOGY

ASSESS THE IMPACT OF ID DEPRECATION

What will be the impact of ID deprecation on your ability to activate your marketing campaigns and measure their performance in the near future? It's time to find out. You can't put a game plan together if you don't have a clear sense of your current dependencies.

Michael Schoen, Neustar, A TransUnion Company

EMBRACE UNIFIED MEASUREMENT

It used to be that MMM was the biggest obstacle for attribution because it was the established order, and anything that went against it died. But successful companies are figuring out how to bring alignment between MMM, MTA, and other tools in their portfolio. Unified measurement is a game-changer, and it's time for you to get on the journey too.

Vas Bakopoulos, MMA

DON'T BE PERFECT

If we didn't know it before the COVID-19 pandemic, we know by now that the world isn't completely predictable, so don't strive for perfection with your measurement solutions. Use the best tools at your disposal, but test, learn, and explore outliers for hints of things to come. If you can't work with user-level data for a particular channel, use cohorts or other privacy-preserving tools.

Hardy Faison, General Motors
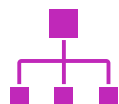
START SMALL

When we first rolled out MTA, we tried to apply it to every single brand all at once. It was a huge mistake. Some of the teams weren't up to speed yet and didn't understand the benefits. We quickly pivoted to focus on a handful of brands instead where MTA could make an immediate impact.

Bill Cramblit, Molson Coors

BUT DREAM BIG

Your colleagues in strategic and tactical roles want to work together and contribute to one another's success. That's been difficult to achieve in the past, but measurement is a big picture area of opportunity that can really help develop that symbiotic relationship. And transform marketing's premise from a cost center to an incremental revenue engine in the process.

Eddie Drake, Bank of America

BE A TEAM PLAYER

You need to spend time with teams across your organization to help them see things holistically. Outcomes are everything. Prove to them that what you're doing is going to help them make better strategic decisions, improve their budgeting decisions, and deliver a much better overall experience for your consumers. Make the teams part of the process, and the right measurement framework will fall into place for the company as a whole.

Micah Davis, Hallmark

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> **Modern measurement requires grooming, calibration and careful integration, but it's well within our grasp. If you let cookie deprecation kill your ambitions, you didn't dream big enough.**
>
> *Eddie Drake, Bank of America*

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MATT
MARKETING ATTRIBUTION THINK TANK

▪ Marketing Attribution Think Tank

MTA is hard, but you're not alone.

The Marketing Attribution Think Tank (MATT), managed by the MMA, is a strong community of marketing and analytics leaders committed to advancing people-based approaches in media measurement and throughout the entire process of planning and buying. MATT's primary goals are:

Measurable impact and accountability:	**People-Based Approaches:**	**Media Measurement:**
We aim to replace outdated reach-based models with scientific ROI decision making.	We believe that the future of marketing will be people-based, and therefore the future of marketing measurement must be people-based as well.	We are committed to helping marketers select and apply MTA with confidence.

MATT and the MMA are here to help you
on your journey, so please reach out:
mmaglobal.com/matt

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Acknowledgments

ABOUT MMA

Comprised of over 800 member companies globally and 14 regional offices, the MMA is the only mobile trade association that brings together the full ecosystem of marketers, tech providers and sellers working collaboratively to shape the future. The MMA's global headquarters are located in New York with regional operations in Asia Pacific (APAC), Europe/ Middle East/Africa (EMEA), and Latin America (LATAM).

Contact:

Jill Inglis
Lead, Marketing Attribution Think Tank (MATT)

ABOUT TRANSUNION (NYSE: TRU)

TransUnion is a global information and insights company that makes trust possible in the modern economy. We do this by providing an actionable picture of each person so they can be reliably represented in the marketplace. As a result, businesses and consumers can transact with confidence and achieve great things. We call this Information for Good.®

A leading presence in more than 30 countries across five continents, TransUnion provides solutions that help create economic opportunity, great experiences, and personal empowerment for hundreds of millions of people.

http://www.transunion.com

ABOUT NEUSTAR

Neustar, a TransUnion company, is a leader in identity resolution providing the data and technology that enable trusted connections between companies and people at the moments that matter most. Neustar offers industry-leading solutions in marketing, risk and communications that responsibly connect data on people, devices and locations, continuously corroborated through billions of transactions. Learn how your company can benefit from the power of trusted connections.

https://www.home.neustar

Contact:

Allyson Dietz
Director Product Marketing

ABOUT NEUSTAR UNIFIED ANALYTICS

Neustar Unified Analytics™ is a SaaS analytics offering, backed by broad measurement integrations and professional services expertise, that enables marketers to measure all consumer activity to make critical, on-the-fly optimizations to their marketing mix, campaign tactics, and audience targets to improve marketing's impact on sales. Learn more at home.neustar/unified-analytics