



# Attribution and the Empowered Marketer

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*Presented By*



*With the Support Of*



# Acknowledgements and Research Methodology

This report would not have been possible without the significant contributions of more than 150 executive-level thought leaders—including contributors, sponsors and reviewers representing all segments of the advertising, marketing, media and technology industries. In particular, Winterberry Group is grateful to our research partner, DMA, as well as our presenting sponsor:



Additionally, we extend our deepest appreciation to the marketers, service providers and technology developers who contributed time, insights and enthusiasm in support of our research.

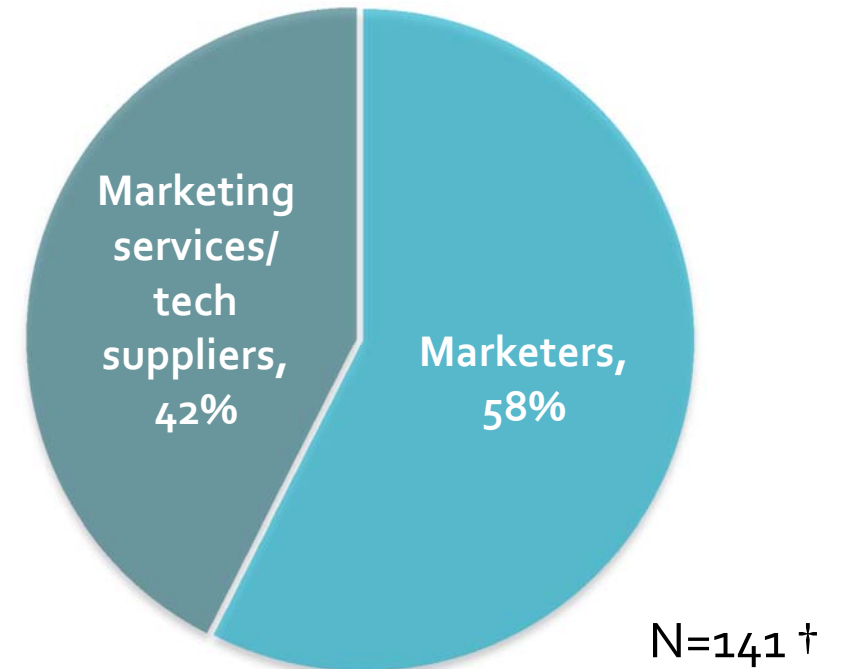
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## Research Panel

The findings within this Report are based on the results of an online survey of more than 100 advertisers, marketers, publishers, technology developers and marketing service providers (primarily based in North America, and conducted between June and July 2017).



†Base numbers may vary by question; respondents were not required to answer all questions

## Foreword: Attribution and the Empowered Marketer

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**The last few years have ushered in a vast wave of change for marketers.** They've had to adapt to new consumer facing channels, contend with the rise of social media, manage the proliferation of vast quantities of data and develop strategies for leveraging sophisticated new technologies in service to the old, established "art" of marketing.

But perhaps no recent development has presented more of a challenge than attribution. For just as technology, data and new media have ushered in widespread opportunity, they've also complicated the task of understanding how individual promotional efforts drive customer action, rendering John Wanamaker's 19<sup>th</sup> century adage—"I know half my advertising spend is wasted; the trouble is I don't know which half"—more appropriate now than ever before.

Increasingly, marketers are waking up to that mandate. But rather than miring themselves in the difficulty associated with measuring performance in an "omnichannel" environment, many are coming to see attribution as a source of definitive competitive advantage—essentially, as an opportunity to **empower themselves** with the insight needed to both improve performance and elevate the role of the marketing function as a source of **critical business insight**. Ultimately, improving marketing attribution isn't about building better reports; rather, it presents the means for:

- **Delivering better, more engaging customer experiences**
- **Maximizing the yield of every dollar of marketing investment; and**
- **Demonstrating the real value that the marketing organization delivers to its organization.**

This report represents just one effort to crystallize some of the key issues facing marketers as they look to advance their attribution efforts with an eye on those critical objectives. We hope you'll find its conclusions useful, and we look forward to engaging with many of you in the effort to advance the cause of attribution—and the **empowerment of marketers everywhere**.



**Jonathan Margulies**  
*Managing Director*  
*Winterberry Group LLC*

## Executive Summary: In Search of Both Effectiveness and Efficiency, Marketers Increase Focus on Attribution

**A**tttribution has represented a fundamental challenge for marketing practitioners for, well, just about as long as marketing has had practitioners. The contributing causes are numerous: inadequate or inaccessible data, immature technology, limited expertise, ambiguous (or non-existent) metrics and more.

But for marketers wrestling with these challenges, there appears to be light at the end of tunnel. Attribution now represents a fundamental organizational priority across a majority of marketing organizations; **62.8% of marketer panelists said that it has grown as an priority at their company within the past year, and over half (54.9%) said it is now a *top* priority** for focus and investment.

What's more, marketers are gearing their attribution initiatives to a broader array of business priorities, reflecting a mature awareness that **insightful measurement ought to serve the needs of the customer**—by empowering marketing **effectiveness** that allows for the delivery of better, more unified experiences—just as it provides the insight that helps marketers make more **efficient** decisions about how to optimally allocate their resources.

For the **overwhelming number of practitioners (93%, to be exact) who are anything but *fully* satisfied with their ability to apply the results of their attribution efforts to improve business outcomes**, that should come as welcome news—and reason for optimism that attribution's best days may be ahead.



## Key Findings: Marketers Moving to Prioritize Their Cross-Channel Attribution Efforts; Universal Methodologies and Standards Desired

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- Marketers are increasingly focused on attribution as a way to improve customer experience; 60.4% are interested in the approach as a way to **optimize the media mix** and 55% say their interest is driven, in part, by their desire to **activate omnichannel strategies**



- No consensus methodology governs how marketers practice attribution today; **most use a combination of approaches to assign credit** to various audience touchpoints



- Email (cited by 75.8% of panelists) is the touchpoint that marketers **most commonly integrate in their cross-channel attribution efforts**, asserting the channel's unique role as a "bridge" linking an understanding of audience identity with downstream activity



- Though many factors conspire to hinder marketers' attribution efforts, panelists said that a combination of **insufficient data** (cited by 39.3% of panelists) and **lack of a coordinated attribution strategy** (35.5%) reflect the most significant barriers challenging their efforts; and



- 62.6% of panelists believe **universal attribution standards** (as established by a trade association or other industry group) would be helpful in supporting their organization's attribution efforts

# What is Marketing Attribution?

## Marketing Attribution

The practice of measuring and assigning value to each marketing touchpoint (or customer interaction) across a customer journey

*Our research aims to address a series of themes fundamental to understanding the state of marketing attribution among enterprise-class U.S. marketers today*



**WHY** are marketers intensifying their attribution efforts?

**HOW WELL** are today's marketing attribution approaches working in practice?



**WHAT** obstacles might be hindering greater attribution success?

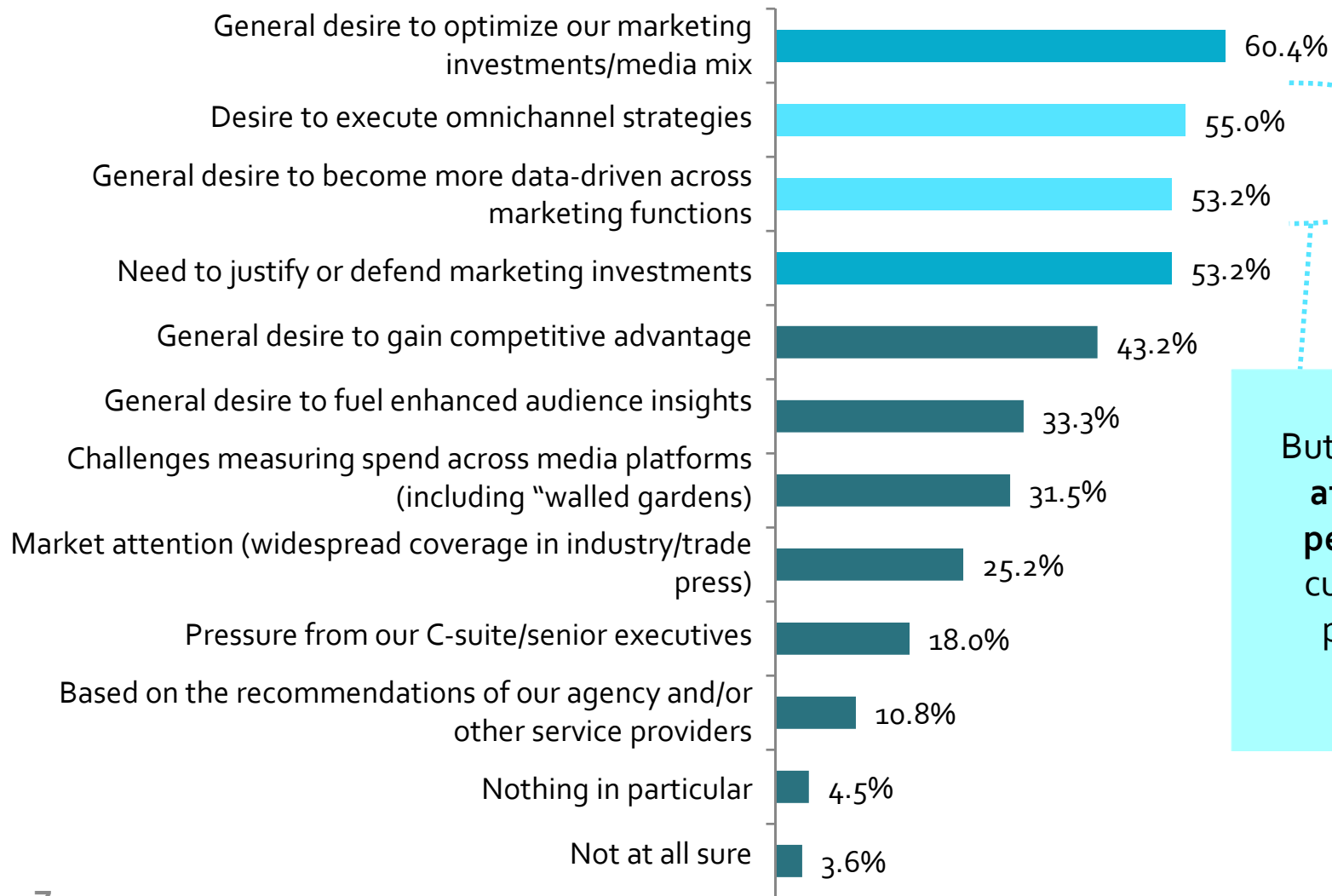
**HOW SHOULD** practitioners be thinking about advancing their attribution efforts?





# Why Attribution? Marketers Say Better Understanding Their Own Performance is Key to Improving Both Efficiency and Bottom-Line Effectiveness

*What factors, if any, are driving your organization's current prioritization of marketing attribution?*



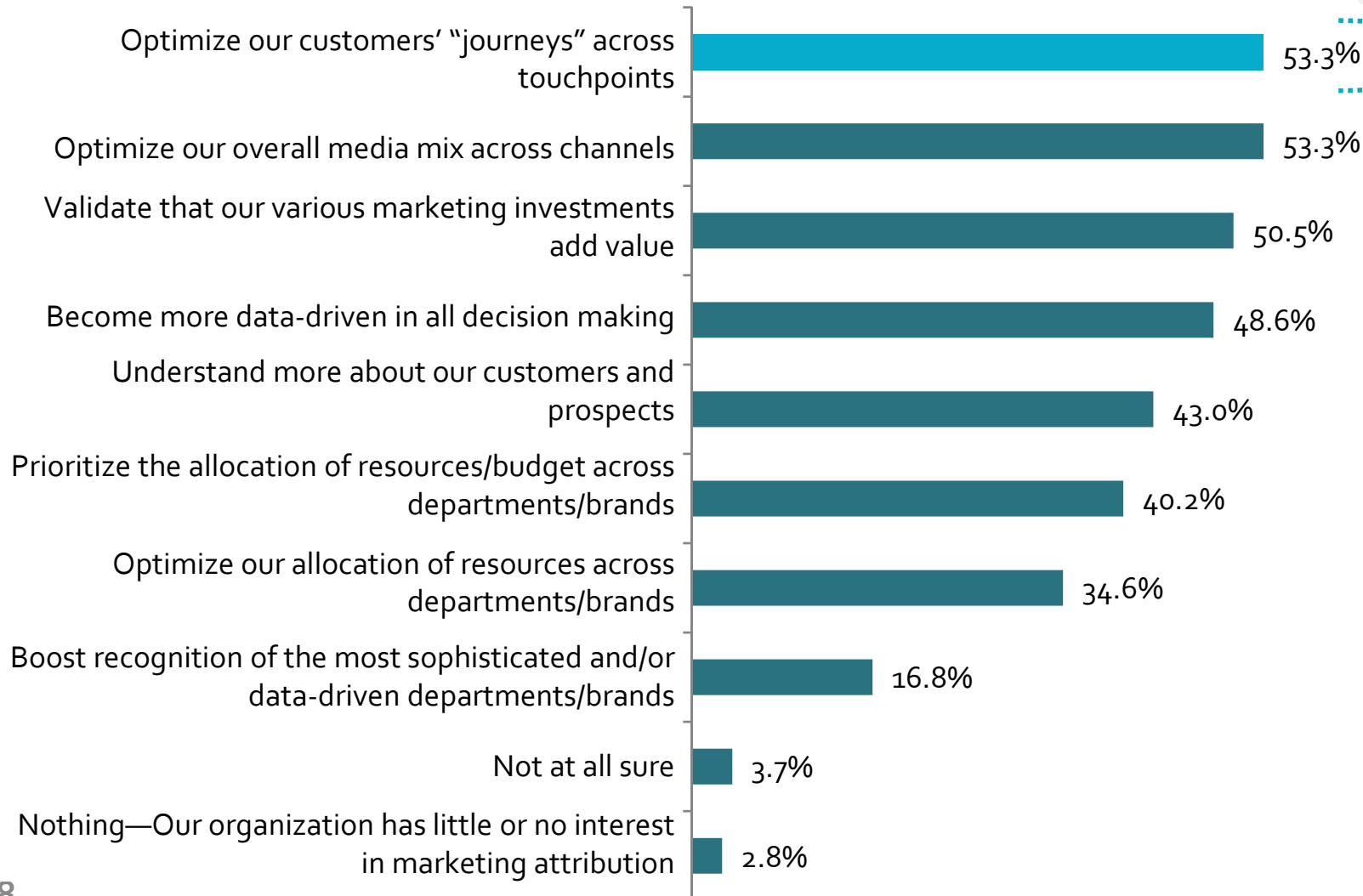
Foremost among marketers' attribution needs: **the optimization of marketing efficiency**—ensuring budgets are spent wisely, waste is kept to a minimum and significant investments tie to defensible outcomes

But just as importantly, panelists said that **modern-day attribution should serve to drive better marketing performance**—particularly by helping to show where customer experiences may be improved, aligned and powered by data-driven insights so as to align with overarching "omnichannel" strategies



# At the Center of the Attribution Effort: Improving the Cross-Channel Customer Journey

*What would you say are your organization's most important objectives with respect to marketing attribution?*



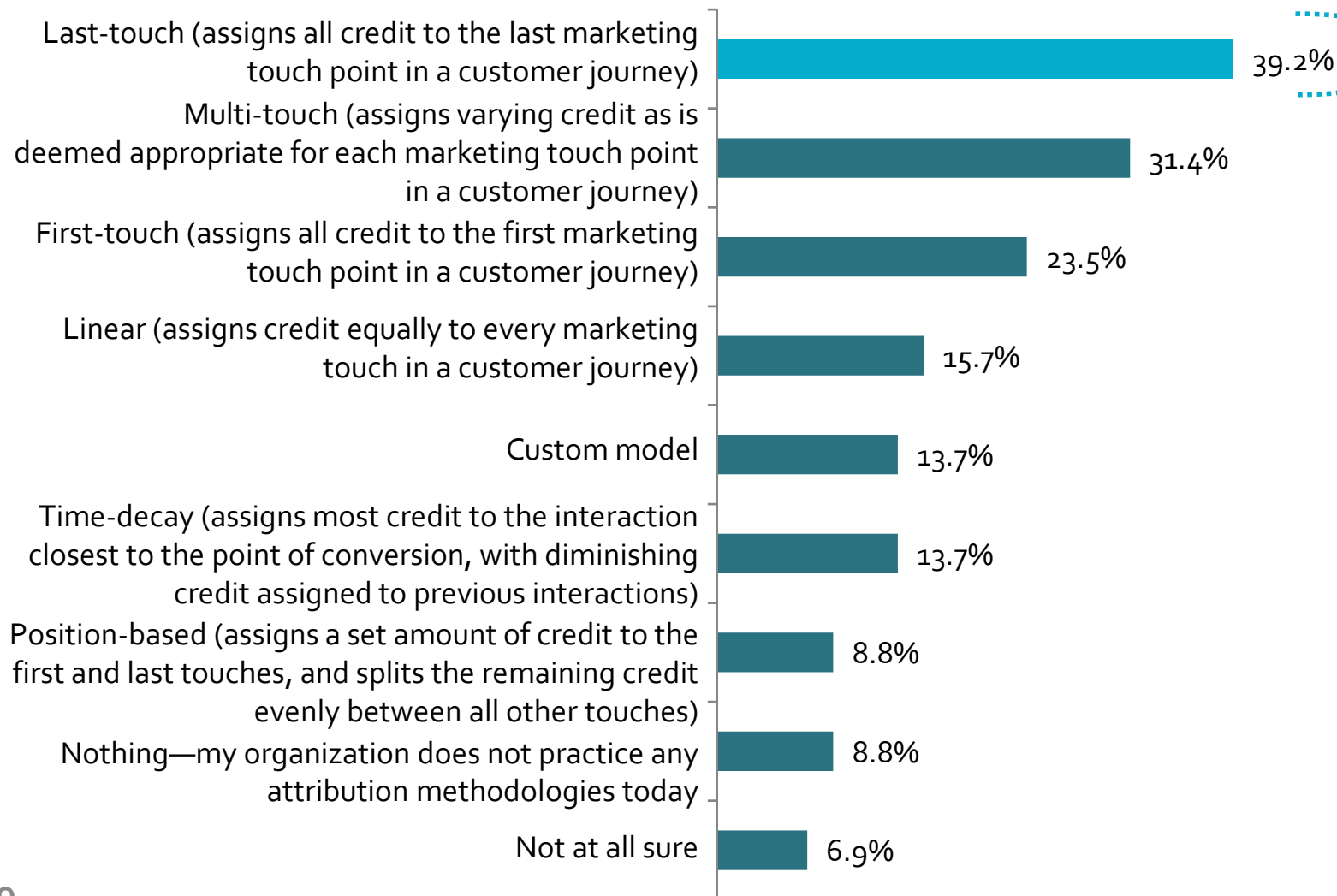
Though attribution-related priorities are often framed in the context of marketers' internal needs, panelists said that **customer needs**—particularly with respect to the delivery of experiences that are optimized across channels—factor just as prominently in the set of objectives that are driving their related efforts





# How is Marketing Attribution Being Done Today? Panelists Said Methodologies Differ Widely; “Last-Click” Approach Still Most Common

Which of the following methodologies is your organization deploying in support of its marketing attribution efforts today?



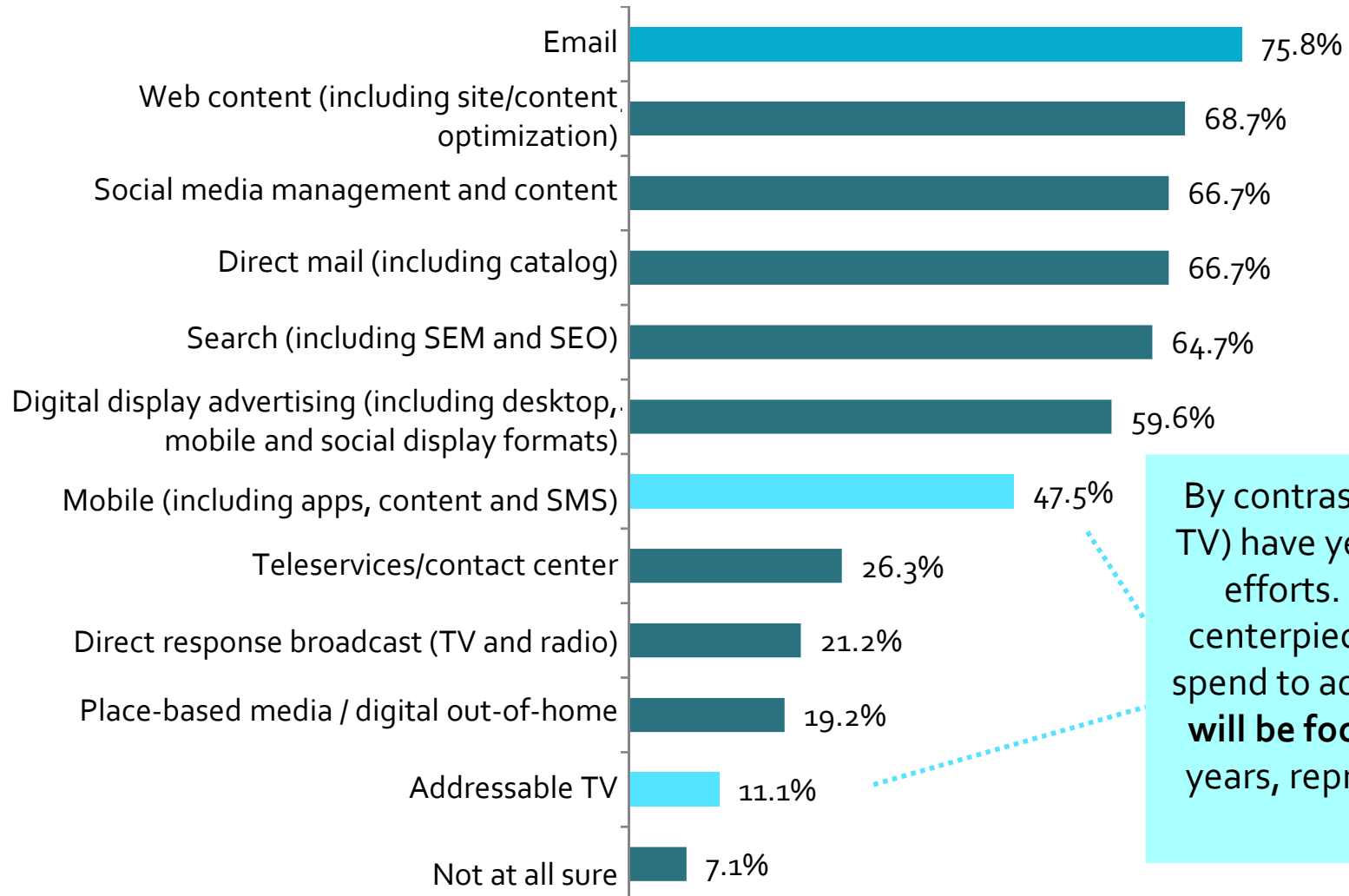
Marketers say they continue to deploy a vast and highly-fragmented range of approaches—some custom, some common—to support their attribution efforts. But no single approach yet represents an “industry standard” in use by a majority of practitioners.

Still in heaviest use: the “last-click” methodology—which draws widespread criticism for assigning outsized credit to marketing touchpoints closest to the point of consumer action (and thus potentially discounting the contributions of other interactions).



# Email Plays an Important Role as an Attribution “Bridge,” Linking An Understanding of Audience Identity and Downstream Activity; Mobile’s Role Still Evolving

Which of the following channels does your organization incorporate in its cross-channel attribution efforts?



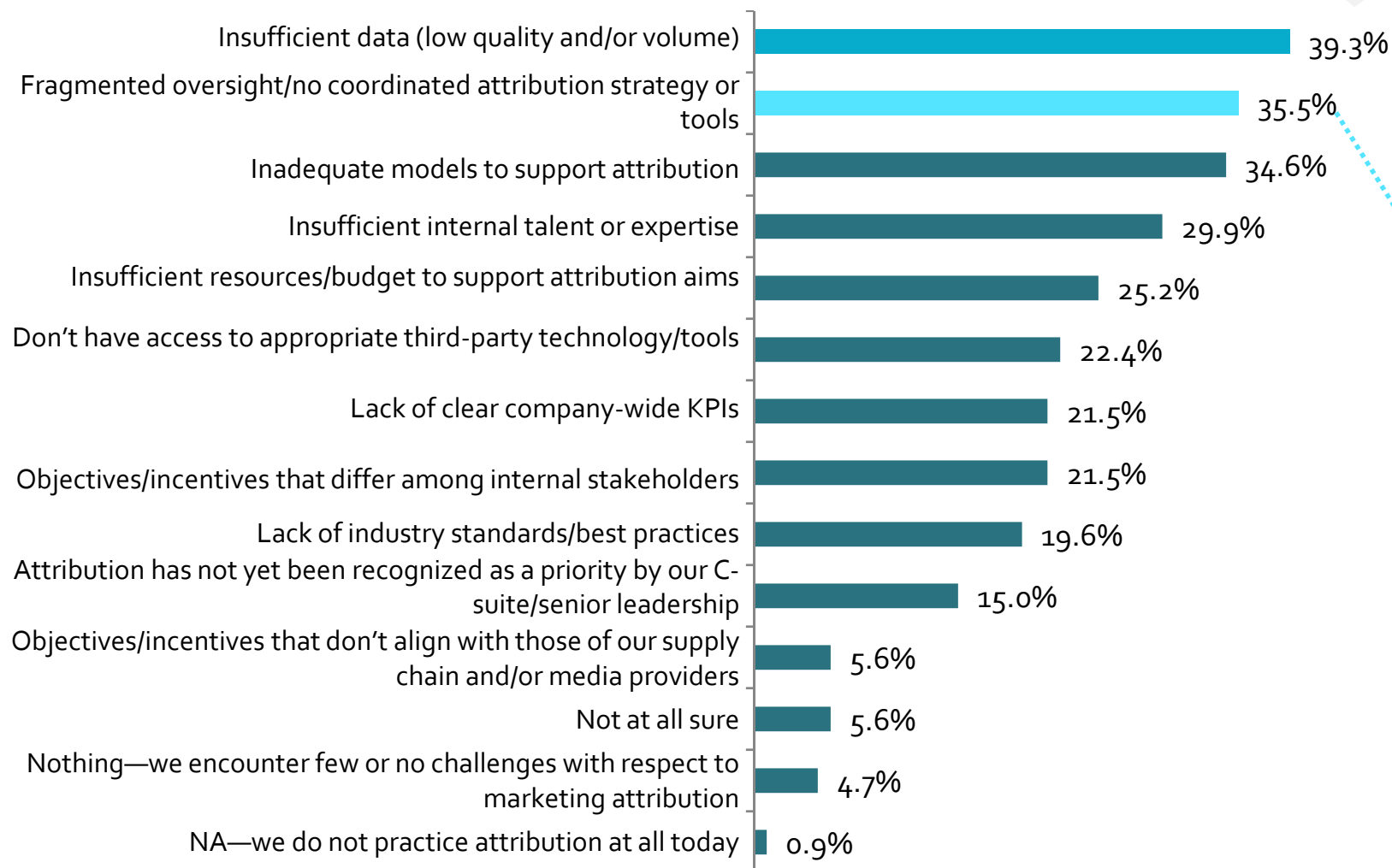
Email is the most common component of cross-channel attribution efforts, bridging two critical functions: **understanding audience identity** (as determined by both “traditional” and digital data elements), and **mapping those identities to purchase and other conversion activities** that may happen across a range of touchpoints

By contrast, mobile (and, to an even greater extent, addressable TV) have yet to find their way into most cross-channel attribution efforts. But given the rapid ascent of the mobile device as a centerpiece for customer engagement—and the general shift in spend to addressable TV formats—it **seems likely that marketers will be focusing significant emphasis on both** over the coming years, representing an effort to surmount last major barriers to true cross-channel performance insights



## What Stands in the Way of Better, More Actionable Attribution? Data, Process Hurdles

Which of the following represent the most significant challenges your organization faces with respect to attribution?



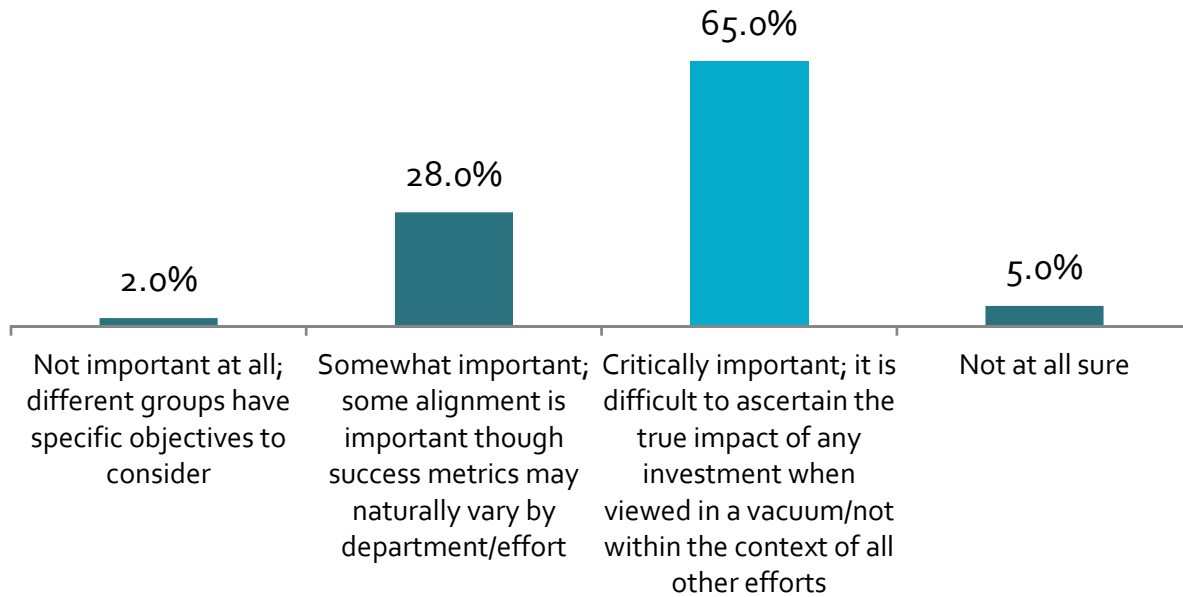
More than any other single factor, marketing practitioners say **insufficient data** (representing either poor access to data or not enough of it) limits their ability to derive actionable attribution insights

Data isn't the only obstacle blocking the path to better attribution. Panelists also said that their inherent organizational structures—including, in particular, the tendency of many companies to deploy **little or no unified strategy to oversee marketing performance management**—are also complicating their efforts

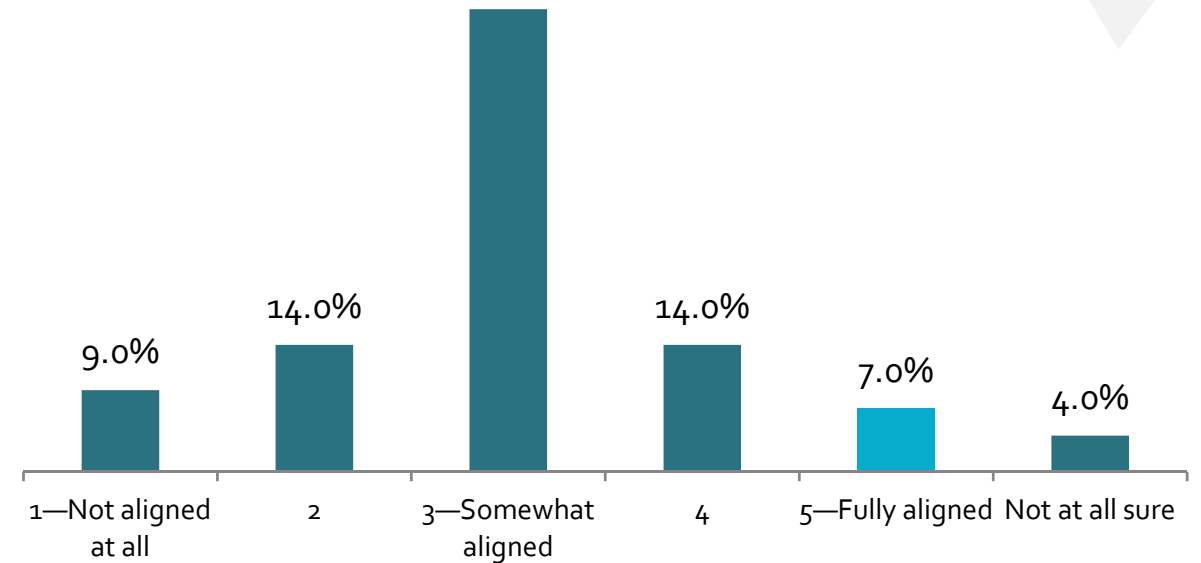


# “Critically Important” to Align Attribution Aims, Panelists Say; But Very Few Companies Respond to That Mandate

How important do you think it is for functional groups, departments and/or brands within an organization to be aligned in their approaches to attribution?



To what extent would you say your organization has a unified approach to marketing attribution?

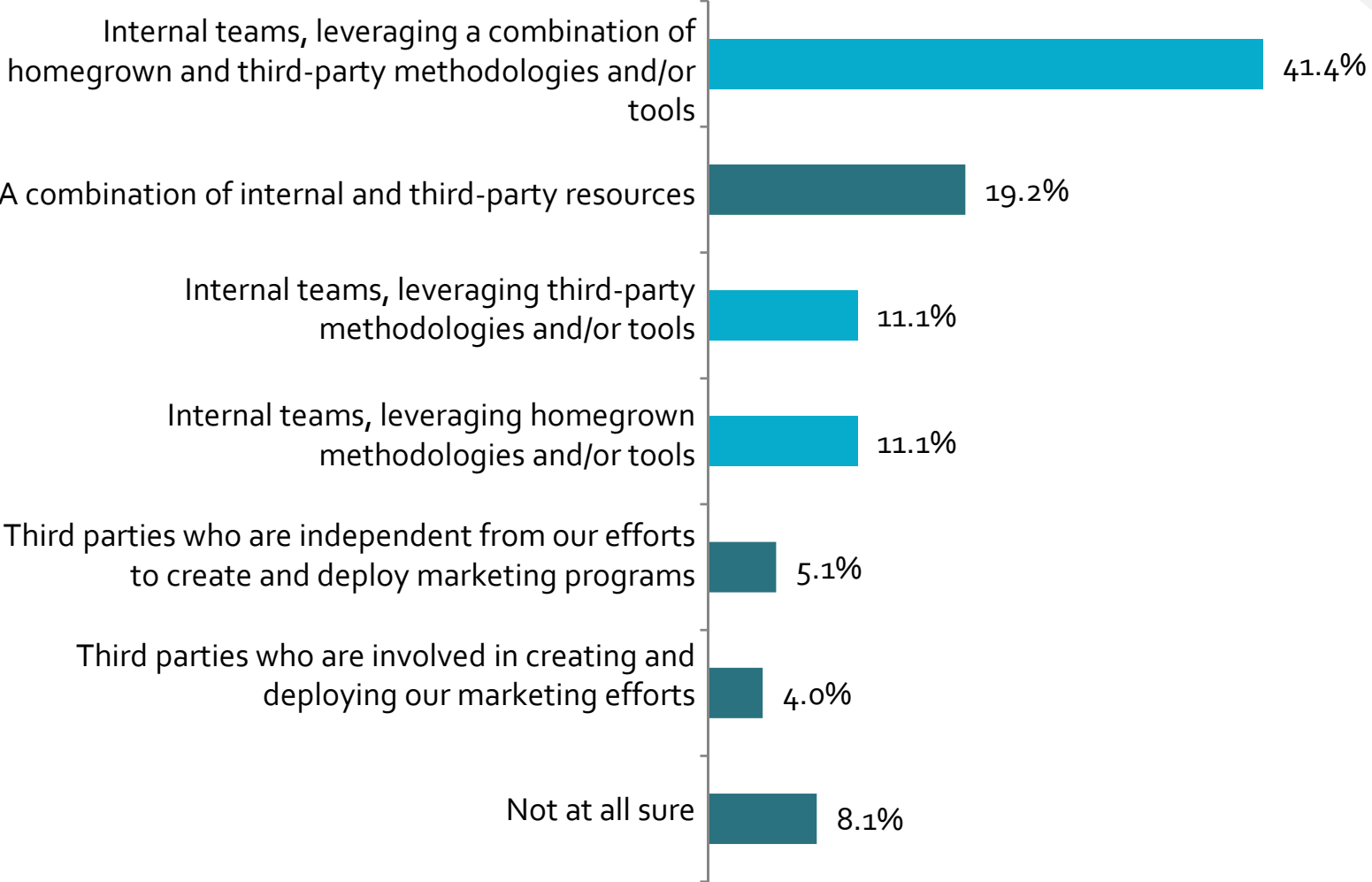


65% say internal alignment is *critically important*, but only 7% say their organization leverages a unified approach to marketing attribution today



# How Should Practitioners Aim to Advance Attribution? Recognize That While Marketers Must Drive the Effort From the “Inside Out”...

*In general, who do you think should take primary responsibility for delivering marketing attribution insights?*



A majority of panelists (63.7%) said that attribution should ultimately be a **core role of the internal marketing team** (though a slightly smaller majority said external tools, methodologies and other resources should be key inputs into how those teams do their work)



# ... Third Parties Have a Significant Role to Play in Providing Specialized Tools, Outside Expertise to Support the Attribution Effort

*In what ways can your partners (including agencies, marketing service providers and technology developers) better support your marketing attribution efforts?*



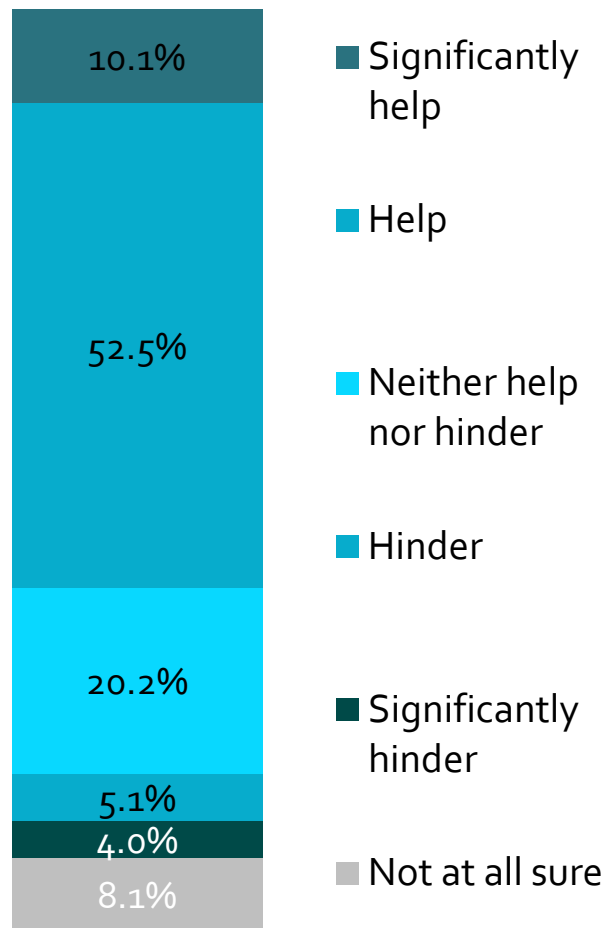
Though industry stakeholders say that attribution is best managed internally, **service providers can better support clients by presenting enhanced reporting tools to help visualize and understand insights**

In addition, **marketers look to their partners to help train their internal teams**, leaning on these industry experts to bring best practices and knowledge for their internal groups to learn and operationalize



# Marketers Would Support Third-Party Efforts to Develop Attribution Standards

*To what extent do you feel that universal attribution standards (e.g. metrics established by a dedicated independent provider or industry trade organization) would support your organization's ability to better attribute its marketing efforts?*



Nearly two-thirds of marketers (62.6%) would support the development of universal attribution standards as a way to support their own efforts

Though many see attribution as a means to achieving competitive advantage, many are also focused on establishing a “level playing field” where shared knowledge can support all industry participants; opinions differ sharply on how that standardization can be achieved



## Aiming to Build Your Attribution-Savvy? Start By Self-Assessing Your Current Approach

For many marketers, the attribution “dilemma” is real. A vast number of organizations still lack the needed strategic alignment, process controls, supporting tools and basic expertise to support attribution methodologies that are **flexible**, **scalable** and **sophisticated** enough to keep pace with the demands of modern-day marketing.

Nevertheless, pathways to improved attribution *do* exist. And they’re addressable to marketers of virtually all sizes and vertical specialties, beginning with a series of **critical assessment questions**:



- Is your data structured in a way that supports **consistent collection and visualization** across promotional and transactional touchpoints?



- Do **stakeholders across your organization agree on the performance metrics** corresponding to their respective marketing investments?



- Is **attribution practiced consistently** across the organization?



- Do you have the **appropriate tools and support from your third-party partners**?



- Do you have **stakeholders representing your organization’s needs to industry associations** and other third parties that may be positioned to support industry advancement?



# About Experian

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**Experian Marketing Services** leverages customer data to empower insight-driven marketing through our unique blend of technology and services. We have been dedicated to the long-term success of our clients and the relationships they create with their customers for over 30 years.

We help brands, agencies and media providers make sense of their data, enabling them to reach the right people in the right channel, with the right message at the right time. Our team of trusted marketing experts works closely with each client to develop solutions that meet their unique business needs and grow with them as their business evolves.

We transform interactions through:

- **Unrivaled customer data and data management that is accessible, flexible, scalable and secure**
- **An audience building and distribution engine that offers seamless integration across channels, devices, media and partners**
- **Powerful analytics that unlock new insights to deepen marketers' relationships with customers; and**
- **Trusted marketing experts who partner with clients and care about their customers as much as they do.**

We believe that solid technology AND stellar service is crucial in today's marketing landscape. With seats on the Data and Marketing Association (DMA) Internet Advertising Bureau (IAB) and Digital Advertising Alliance (DAA), the world's leading brands in retail, travel and hospitality, media, telecom, finance and more trust us to provide the tools and expertise to deliver more intelligent, impactful interactions with their customers.

For more information, please visit [www.experian.com](http://www.experian.com)

# About Data & Marketing Association



Founded in 1917, **DMA** is the community that champions deeper consumer engagement and business value through the innovative and responsible use of data-driven marketing. DMA's membership is made up of today's leading tech and data innovators, brand marketers, agencies, service providers and media companies. By representing the entire marketing ecosystem—from demand side to supply side—DMA is uniquely positioned to bring win/win solutions to the market and ensure that innovative and disruptive marketing technology and techniques can be quickly applied for ROI.

DMA advances the data-driven marketing industry and serves its members through four principal pillars of leadership: advocating for marketers' ability to responsibly gather and refine detailed data; innovating to bring solutions forward for marketers' most vexing challenges; educating today's marketers to grow and lead marketing organizations in the ever-increasing omnichannel world; and connecting industry participants to stay current, learn best practices and gain access to emerging solutions through &THEN—the largest global event for data-driven marketing—and DMA's portfolio of other live events.

For more information, please visit [theDMA.org](https://theDMA.org).



# About Winterberry Group



Winterberry Group is a unique management consultancy that supports the growth of advertising, marketing, media, information and technology organizations—helping clients create custom strategies, capitalize on emerging opportunities and grow their value. Our services include:

## CORPORATE STRATEGY

- Business Assessment
- Strategic Development
- M&A Target Identification and Qualification

## DATA-DRIVEN MARKETING TRANSFORMATION

- Data Activation Strategy
- Marketing Process and Platform Architecture, Design and RFP Management
- Marketing Org. Process Engineering

## M&A TRANSACTION SUPPORT

- Market Landscaping
- Target Company Assessment/ Customer Due Diligence
- Strategic Roadmapping

## MARKET INTELLIGENCE

- Custom Research
- Thought Leadership

Additionally, Winterberry Group is differentiated through its affiliation with Petsky Prunier LLC, the leading investment bank serving the technology, media, marketing, e-commerce and healthcare industries. Together, the two firms provide one of the largest and most experienced sources of strategic and transactional services in their addressable markets.

For more information, please visit [www.winterberrygroup.com](http://www.winterberrygroup.com)