

# Attribution: Understanding & Expectations in MENA Survey Results

Q1 2023

## IAB MENA Attribution Survey Objectives

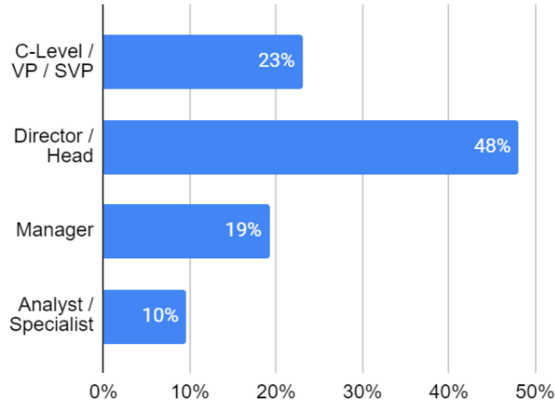
- The IAB MENA Measurement Taskforce conducted a survey among IAB MENA members unveiling their understanding and expectations of attribution.
- The survey objective was to assess the industry's understanding of attribution vis-a-vis what the glossary document shows.
- The survey consisted of 13 questions and 51 completed responses were received.

## IAB MENA Attribution Survey Key Learnings

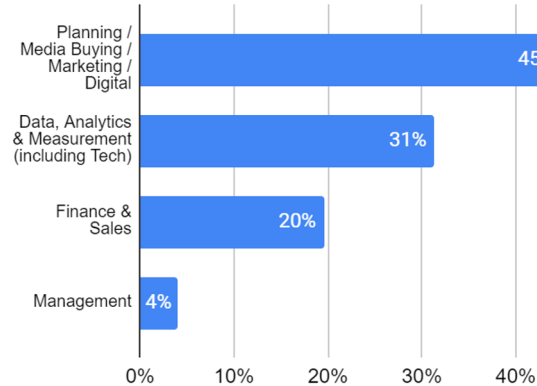
- The primary marketing performance KPIs are mainly bifurcated between digital direct response (Leads and App Downloads) and Brand Lift.
- Marketing effectiveness reporting is practically evenly split between 3<sup>rd</sup> party vendors, web analytics, and paid media platforms.
- Understanding of attribution in the industry is slightly skewed towards digital attribution.
- For Leads, App Downloads and ecommerce, Last Click/Touch and Multi-Touch (digital) attribution are the main methodologies applied.
- The Advertiser/Brand primarily leads with having the final say on attributing marketing results with the Media Agency following close behind.
- The challenges and limitations of attribution are around skill set, cost, and data access. These can be addressed by education/training on the skills required as well as the benefits of various marketing attribution methods.

# Variety of survey respondents across agencies, consultancies, tech vendors and media with a focus on planning/marketing/digital and data/analytics/measurement

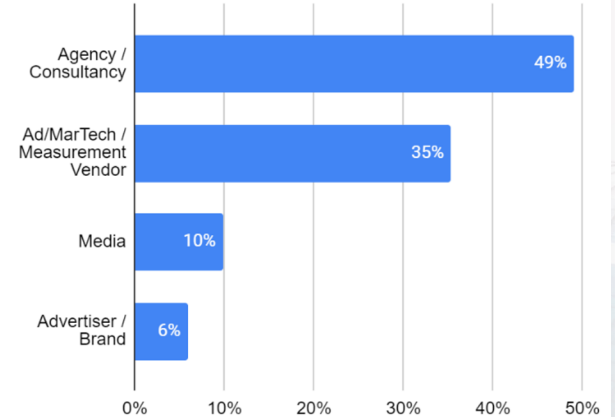
What is your current job level?



What is your current job speciality?

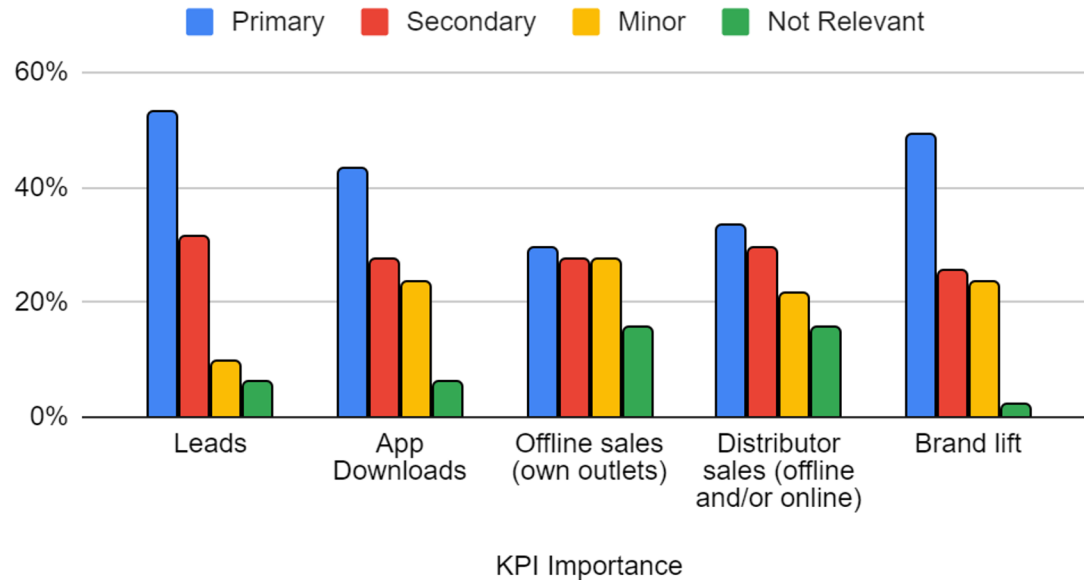


What type of Company do you work for?



# KPIs are bifurcated between direct response (Leads and App Downloads) and Brand Lift

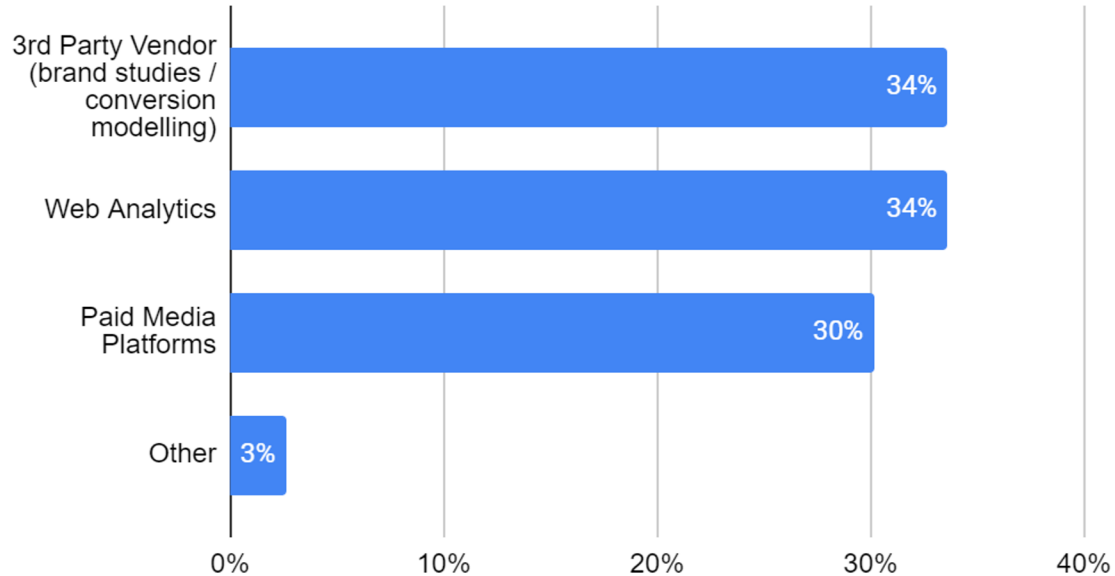
## KPI Importance



\*Missing "E-commerce sales" submissions

Marketing effectiveness reporting is practically evenly split between 3<sup>rd</sup> party vendors, web analytics and paid media platforms

## Marketing Effectiveness Reporting

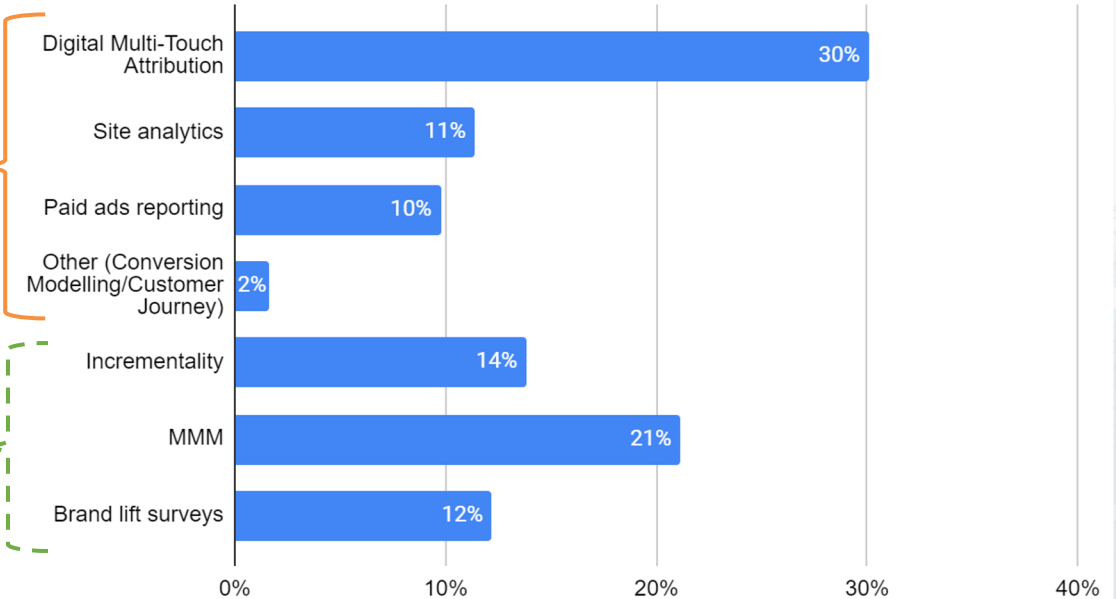


Understanding of attribution in the industry is slightly skewed towards digital attribution (53% of responses). The remaining 47% can encompass both digital and offline.

Almost 53% focused on digital...

...with the remaining 47% potentially across both digital and offline.

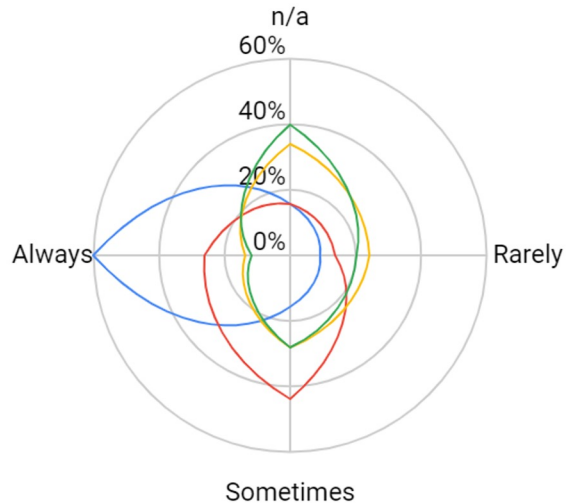
When you hear the words "Marketing Attribution," what do you you mainly think of?



Both Leads and App Downloads skew towards Last Click/Touch majority of the time with Multi-Touch (digital) attribution as a close secondary methodology for attribution.

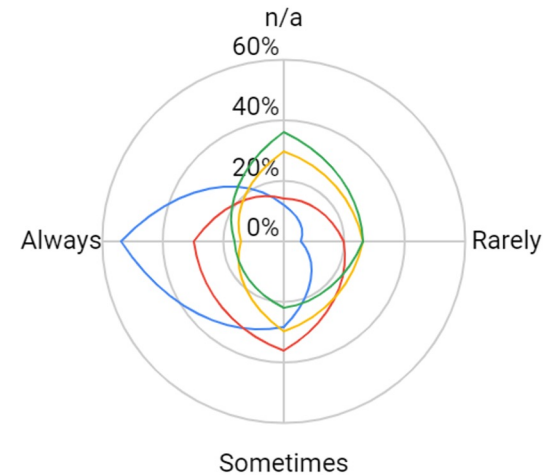
### Leads - Attribution Methods Usage Frequency

- Last Click
- Multi-Touch
- Media Mix
- Incrementally



### App Downloads - Attribution Methods Usage Frequency

- Last Click
- Multi-Touch
- Media Mix
- Incrementally



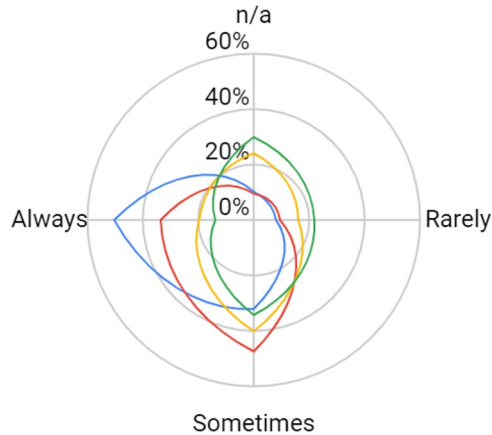
*\* Note: Last Click data for Leads were extrapolated.*



E-commerce attribution skews towards Last Click/Touch with Multi-Touch (digital) attribution a close second. For offline and distributor sales, there is little attribution done

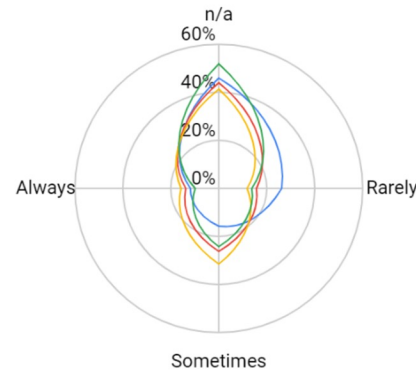
### E-Commerce Sales - Attribution Methods Usage Frequency

■ Last Click    ■ Multi-Touch    ■ Media Mix  
■ Incrementally



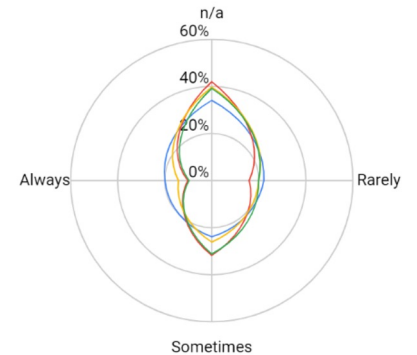
### Offline Sales (own outlets) - Attribution Methods Usage Frequency

■ Last Click    ■ Multi-Touch    ■ Media Mix  
■ Incrementally



### Distributor Sales (offline and/or online) - Attribution Methods Usage Frequency

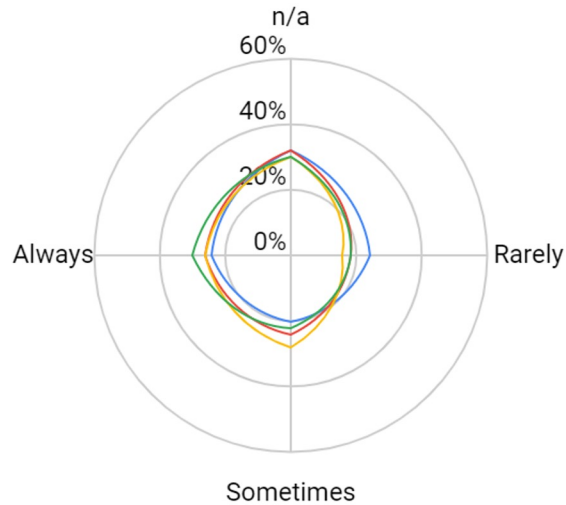
■ Last Click    ■ Multi-Touch    ■ Media Mix    ■ Incrementally



None of the listed attribution methods are likely applicable to Brand Lift studies.

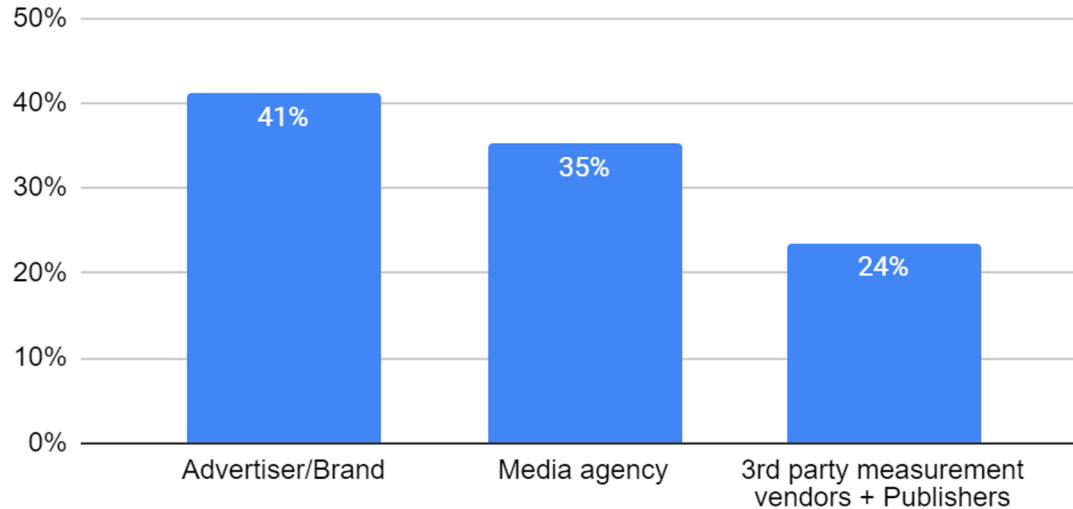
### Brand Lift - Attribution Methods Usage Frequency

— Last Click    — Multi-Touch    — Media Mix  
— Incrementally



The Advertiser/Brand primarily leads with having the final say on attributing marketing results with the Media Agency following close behind.

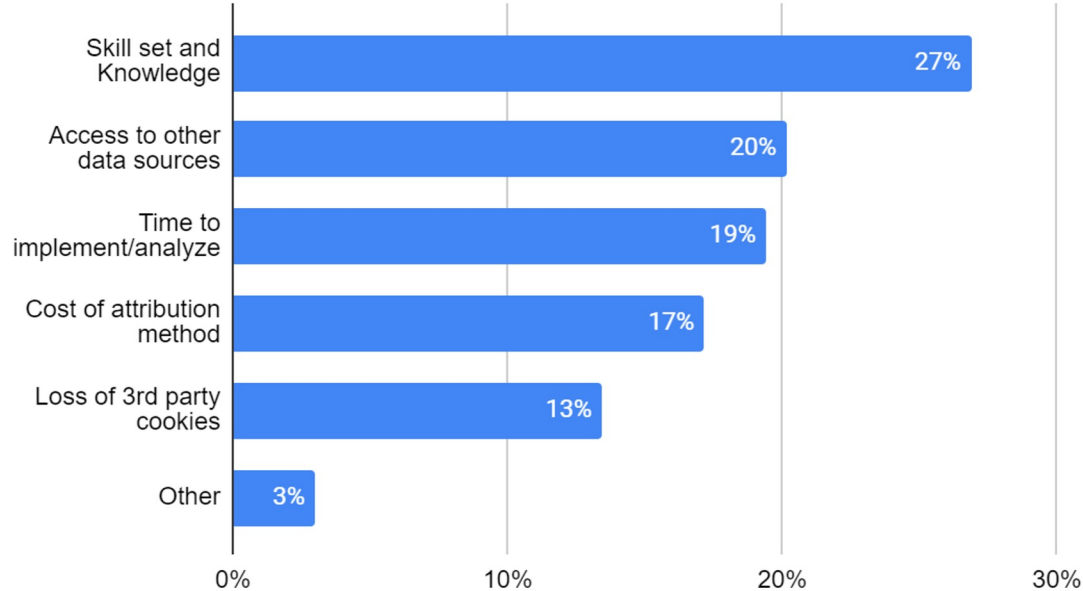
### Final say/decision for marketing attribution



Who is primarily credited with the final say/decision for marketing attribution?

Challenges of skill set, cost and data access can be addressed by education/training on the skills required as well as the benefits of various marketing attribution methods.

Main challenges for attribution in MENA



## Perception of attribution's limitations being around data, skills, and training

*"The purchase decision is not just linked to one particular touchpoint. It's made based on multiple touchpoints - some are media, others are non-media related."*



*"Digital only attribution does not consider the impact of brand and offline advertising. While MMM can cover everything, but considered to be too slow for performance...."*

*"Third-party MTA solutions are limited by data signal loss (third-party cookies & ATT), MMM requires specialised skills that smaller organisations and agencies typically do not employ, and incremental lift studies on publisher platforms are siloed."*

*"Limitation of attribution method will be inability of measuring the impact of non-media factors...."*

## Discussion Points

- Attribution -> Digital attribution in the minds of most in the industry. Likely due to the prominent use of the word on digital attribution sections of Google (Ads and Analytics), Facebook, and other digital ad platforms.
- Instead of trying to convince industry that Attribution encompasses more than just digital touchpoints, focus on grouping Attribution, Incrementality and MMM as 3 inter-related prongs for Marketing Effectiveness/Science with a focus/purpose being to drive maximum results of marketing budgets.
- More training and awareness on (universe/realm of visibility, limitations, etc.) digital attribution, incrementality, and MMM.
- Direction of the industry (both loss of 3<sup>rd</sup> party cookies and focus on privacy and consent) is driving MMM & Incrementality to be more required as either a replacement or add-on to existing marketing performance reporting. This is driving more vendors to join the market and reducing costs. This is also helped by the release of open-source MMM libraries from Google, Facebook, Uber, and others. With the big recent leaps in AI, this should also help in reducing the overall costs of MMM.

End