

In-Housing Is About More Than Programmatic

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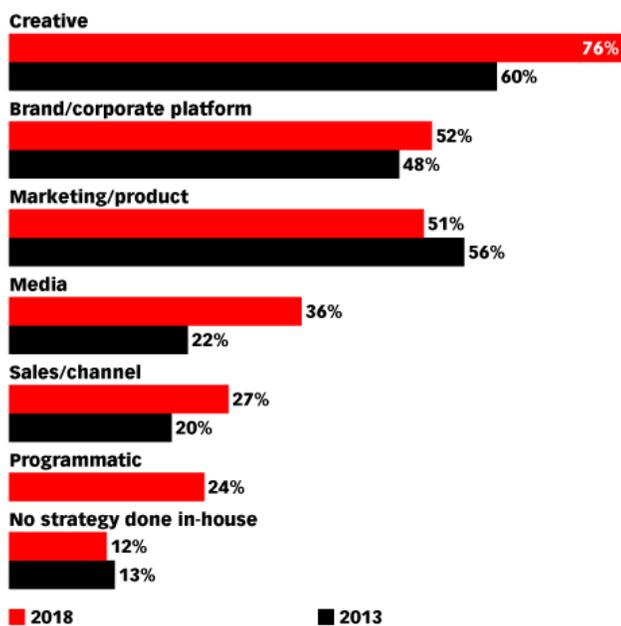
Ross Benes

In a survey of 412 US client-side marketers conducted by the [Association of National Advertisers \(ANA\)](#), 78% of respondents claimed to use an in-house agency, up from 58% in 2013. (An “in-house agency” is defined as a department, group, or person who has responsibilities that are typically performed by an external advertising or other communications agency.)

But not all marketers are doing it for the same reasons, proving the importance of defining what falls under this complex umbrella. For example, 76% of marketers said that creative services are handled by their companies’ in-house agencies. Meanwhile, nearly one-quarter of respondents said they in-housed programmatic.

Which Services Are Handled by US Companies' In-House Agencies?

% of respondents, 2013 & 2018



Note: 2018 n=237 client-side marketers
Source: Association of National Advertisers (ANA), "The Continued Rise of the In-House Agency," Oct 15, 2018

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Studies found that examined programmatic in-housing adoption rates vary. In an August 2017 survey by Infectious Media of 200 brand advertisers worldwide, just 1.4% of respondents **managed their own programmatic campaigns in-house**. However, in a more recent study conducted in May 2018 the Interactive Advertising Bureau (IAB) found that two-thirds of the 119 US brand advertisers surveyed **reported moving their programmatic buying completely or partially in-house**.

Discussions of programmatic and in-housing have begun to broaden in the past few years.

"Most in-housing conversations used to focus squarely on programmatic buying, but that's changing now," said Lauren Fisher, eMarketer principal analyst and author of our upcoming "US Digital Display Trends 2019" report. "More and more companies are now looking at this as a way to reclaim ownership of the customer journey, and all the data, strategy and execution that goes with understanding and acting on that journey. They're realizing that the programmatic buying piece—the execution piece—is part of the larger puzzle."

This more holistic form of in-housing might be coming of age, but it's still hardly one of the initial reasons brands decide to in-house. About four in 10 advertisers polled by the ANA said that **cost efficiencies were the primary benefit** of having an in-house agency. No other benefit—including speed, creative expertise, more control and better brand knowledge—garnered 20% of the total responses.

For more on how in-housing discussions, and practices, are evolving, look out for our upcoming US Digital Display Trends 2019 report, publishing next week.

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