



mirren

Now What?

Mining the Opportunities
with In-House Agencies

Mirren.com



In 2018 The ANA Rocked Our World



In 2018 The ANA Rocked Our World

“The Continued Rise of the In-House Agency”

Followed By Other Studies and Stories

The background of the slide is a photograph of a meeting or conference. A woman in a white top is standing and presenting to a group of people seated at tables. The scene is dimly lit, and the entire image is overlaid with a semi-transparent teal color. Two dark teal rectangular boxes are positioned horizontally across the upper half of the slide, containing white text.

Followed By Other Studies and Stories

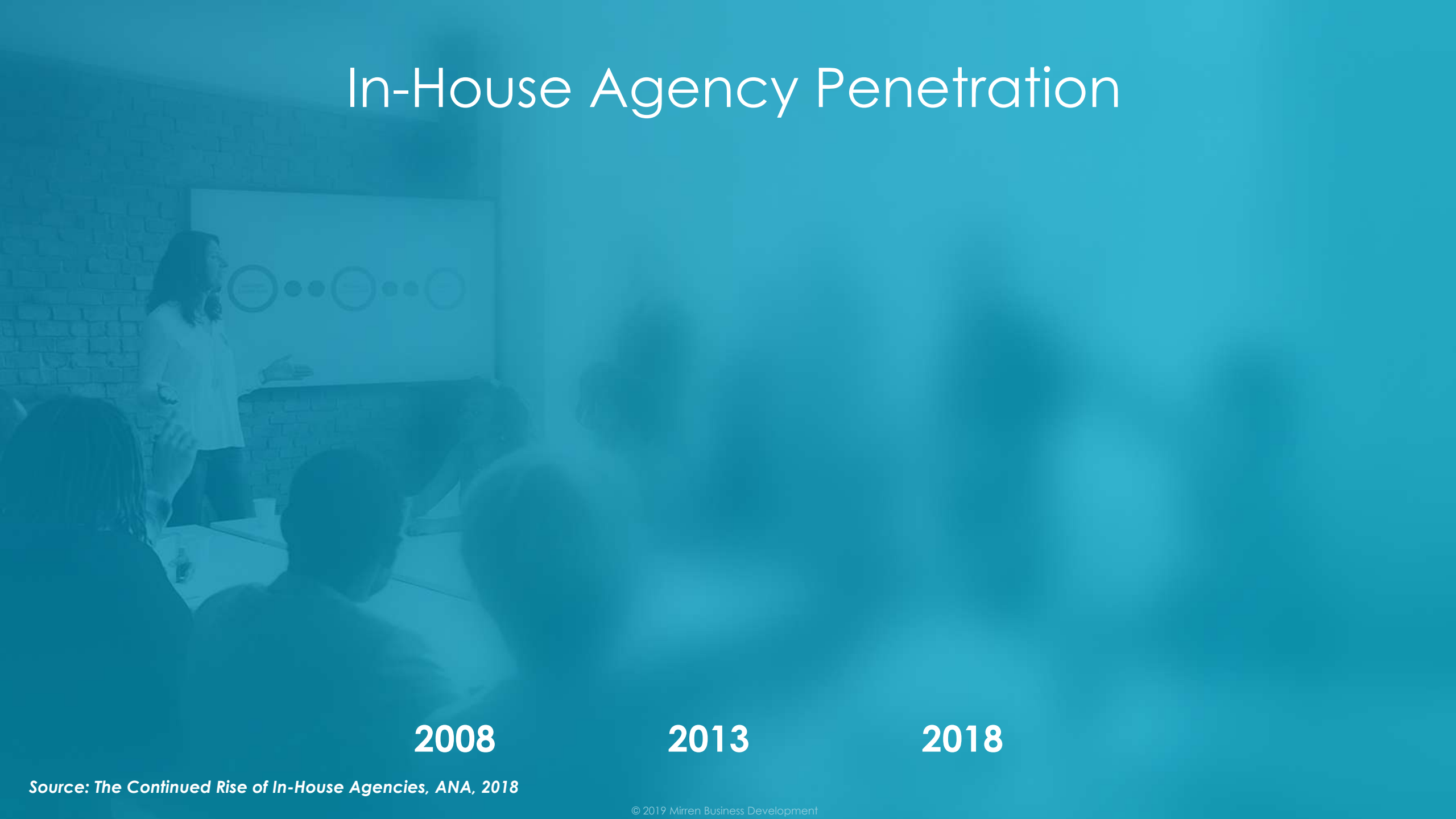
Forrester, SoDA, Mirum, In-House Agency Forum

Followed By Other Studies and Stories

Forrester, SoDA, Mirum, In-House Agency Forum

Extensive Reporting in WSJ, AdAGE, Forbes,
and the NYTimes

In-House Agency Penetration



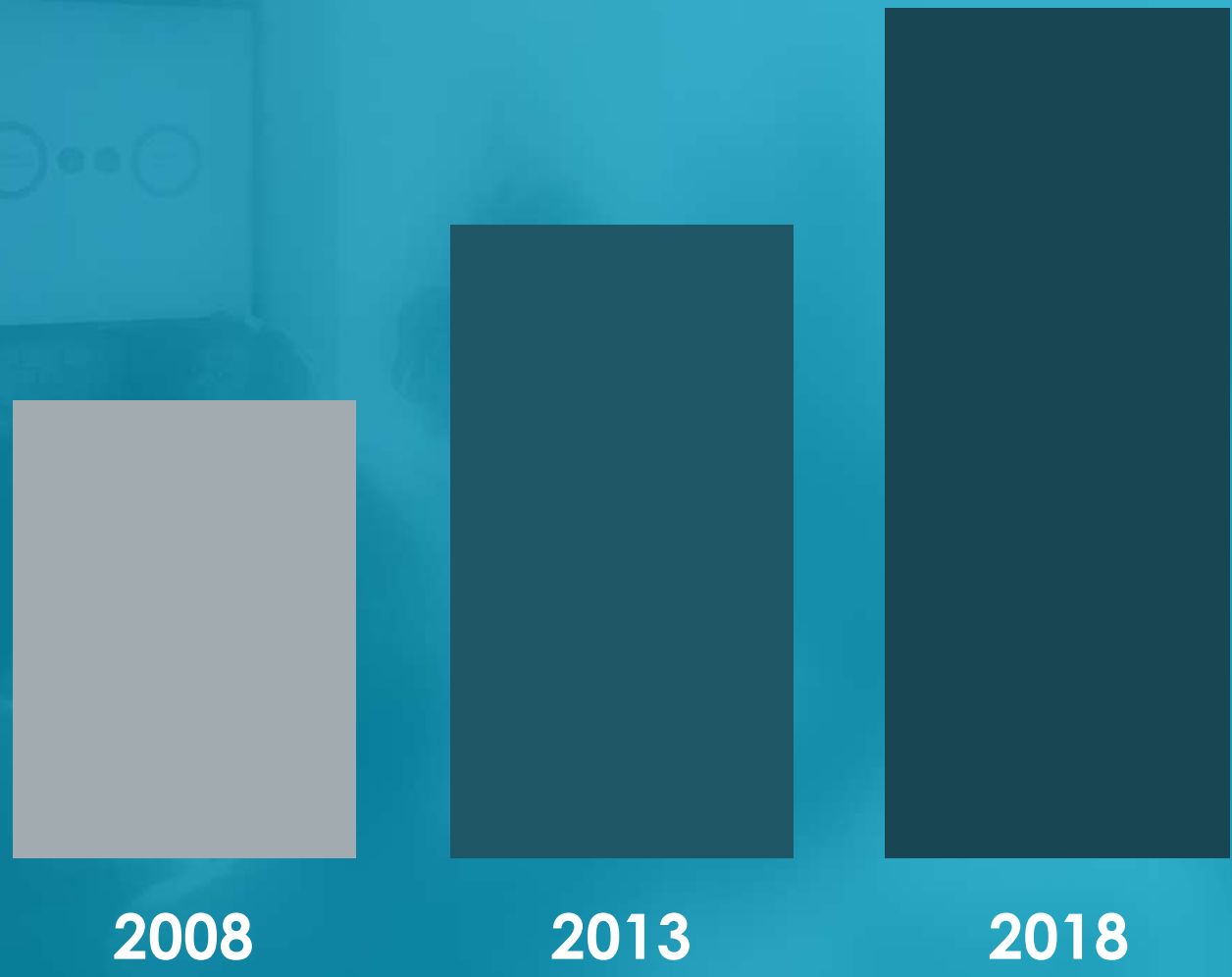
2008

2013

2018

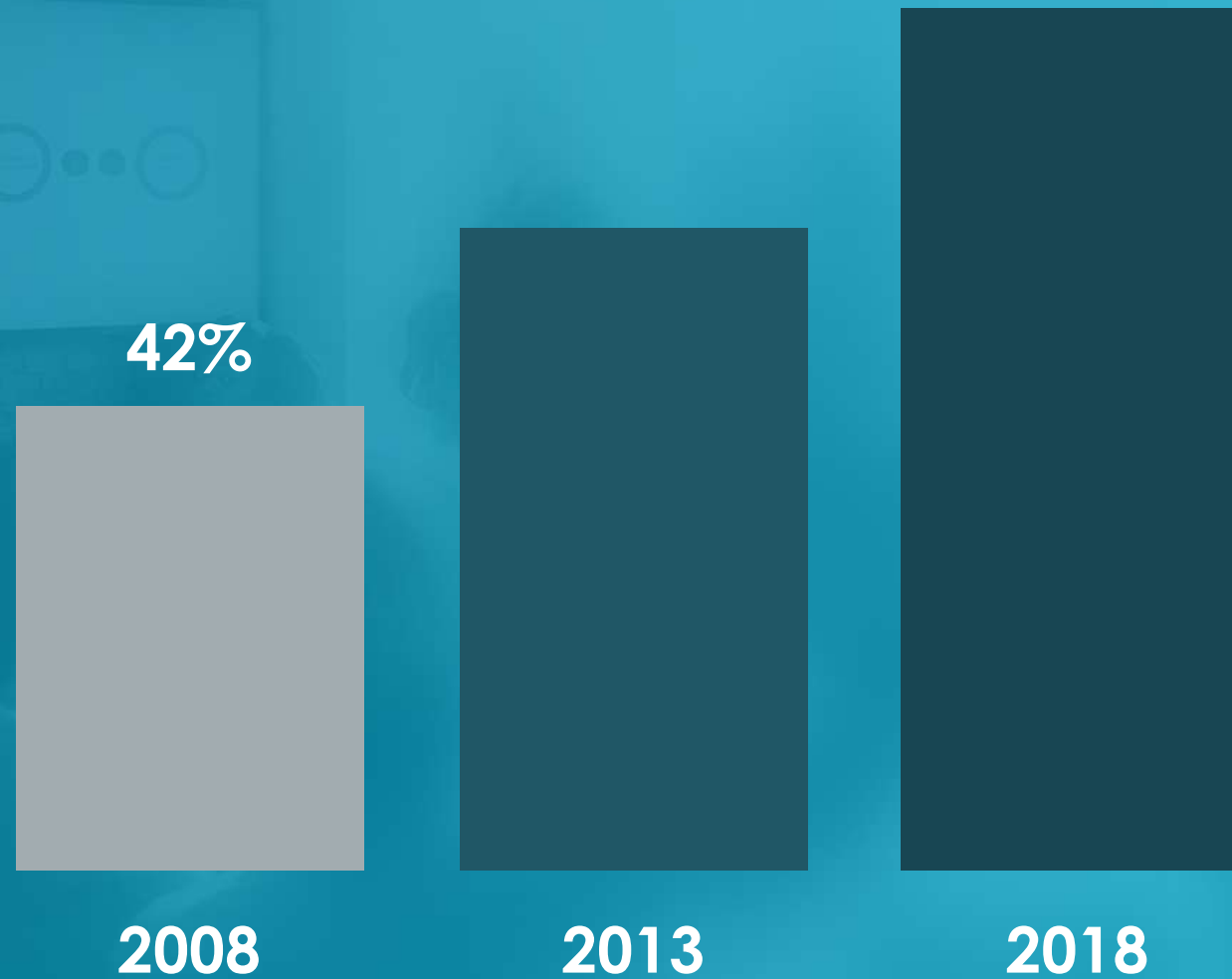
Source: The Continued Rise of In-House Agencies, ANA, 2018

In-House Agency Penetration



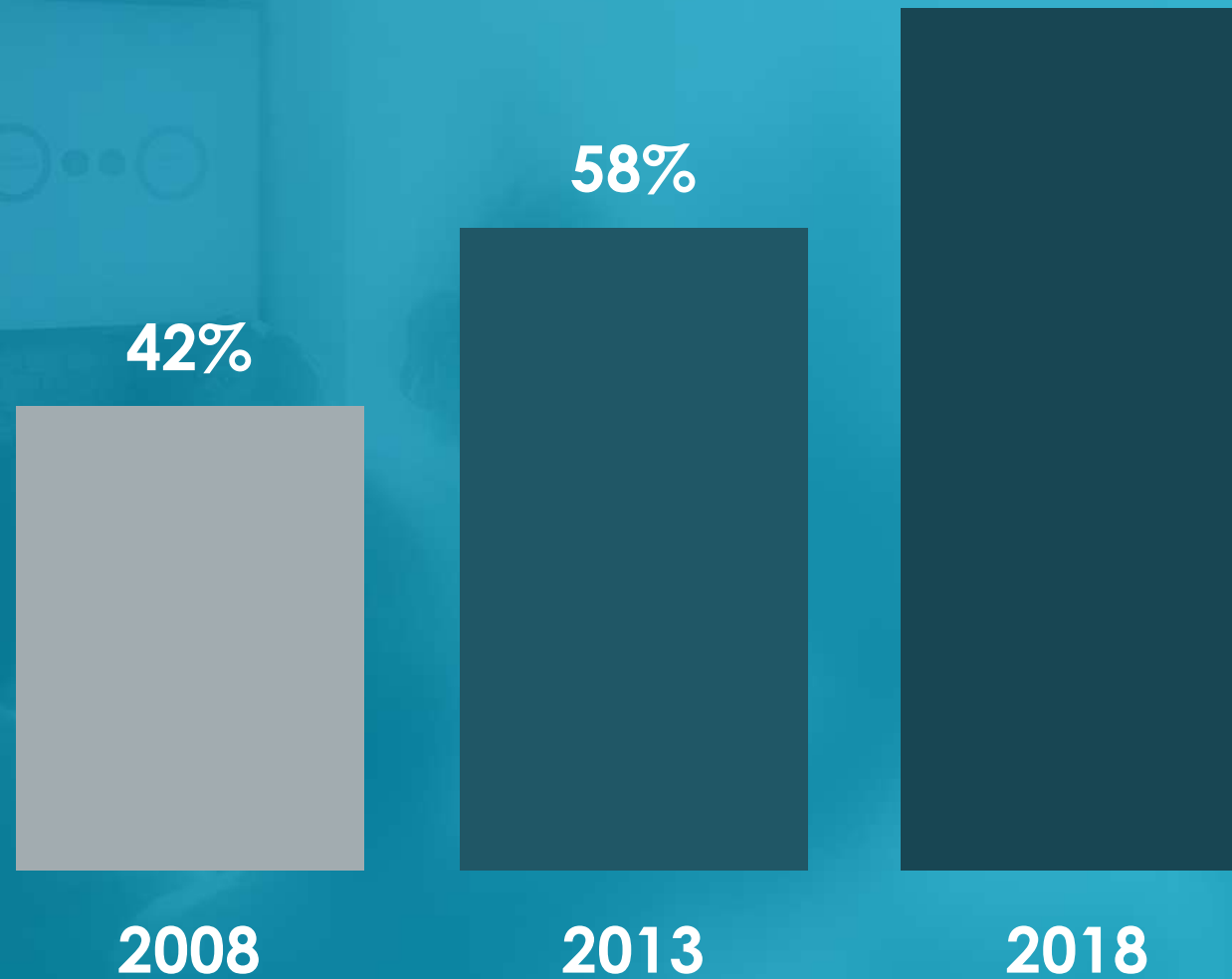
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In-House Agency Penetration



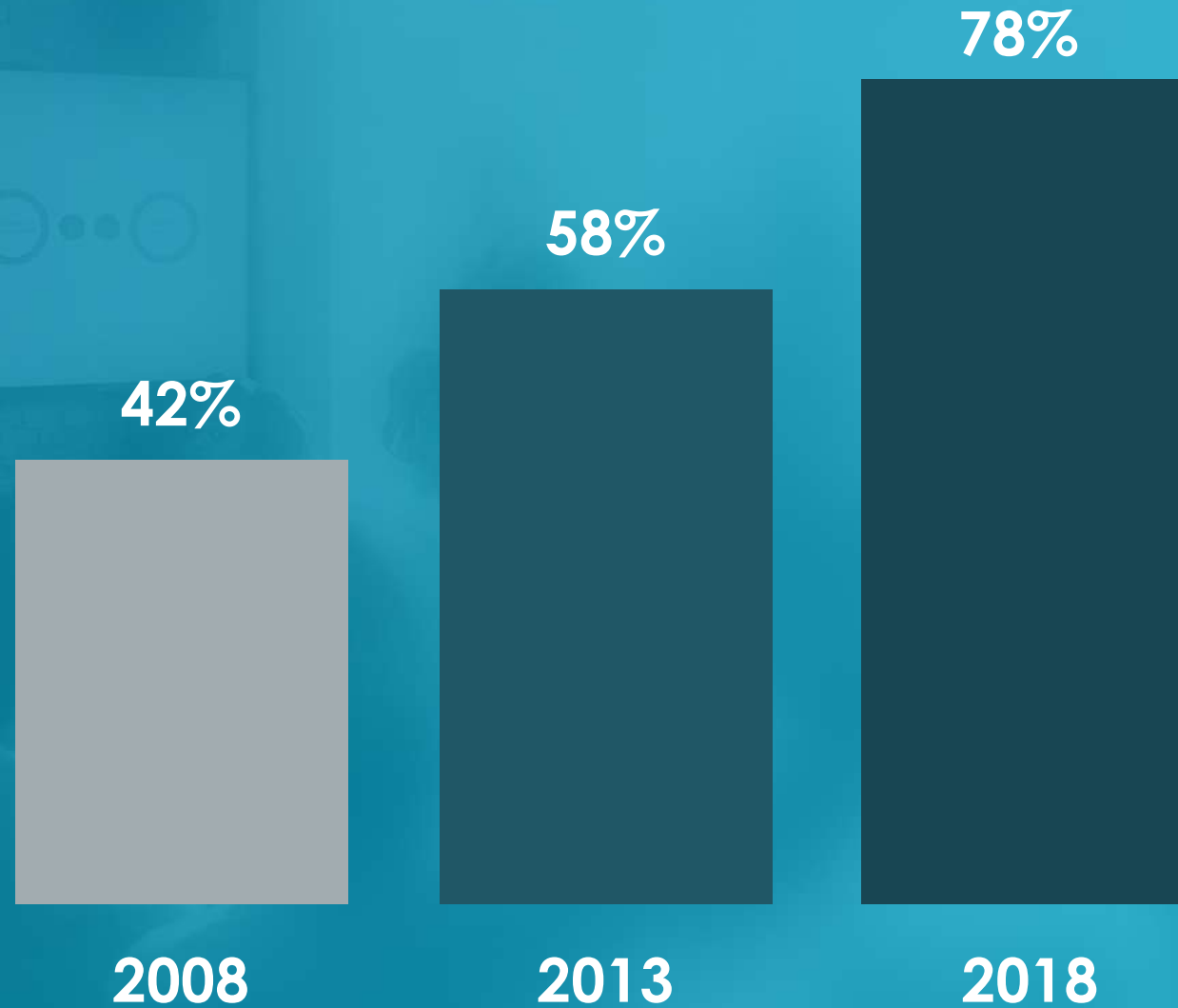
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In-House Agency Penetration



Source: *The Continued Rise of In-House Agencies*, ANA, 2018

In-House Agency Penetration



Source: *The Continued Rise of In-House Agencies*, ANA, 2018



In the Past Three Years **70%** Have Moved
Business In-House

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Business In-House

Up from **56%** in 2013



Agencies Agree

Agencies Agree

80% of Agencies Believe that Most of Their Clients Will Take Some Business In-House

Agencies Agree

80% of Agencies Believe that Most of Their Clients Will Take Some Business In-House

That's a **23%** Increase Over 2016



In 2013

The background of the slide is a photograph of a meeting or presentation. A woman in a white top is standing and gesturing towards a group of people seated at a table. The scene is dimly lit, with the primary light source being the teal overlay. The text is centered in two dark rectangular boxes.

In 2013

Cost Efficiencies

In 2013

Cost Efficiencies

Quicker Turnarounds

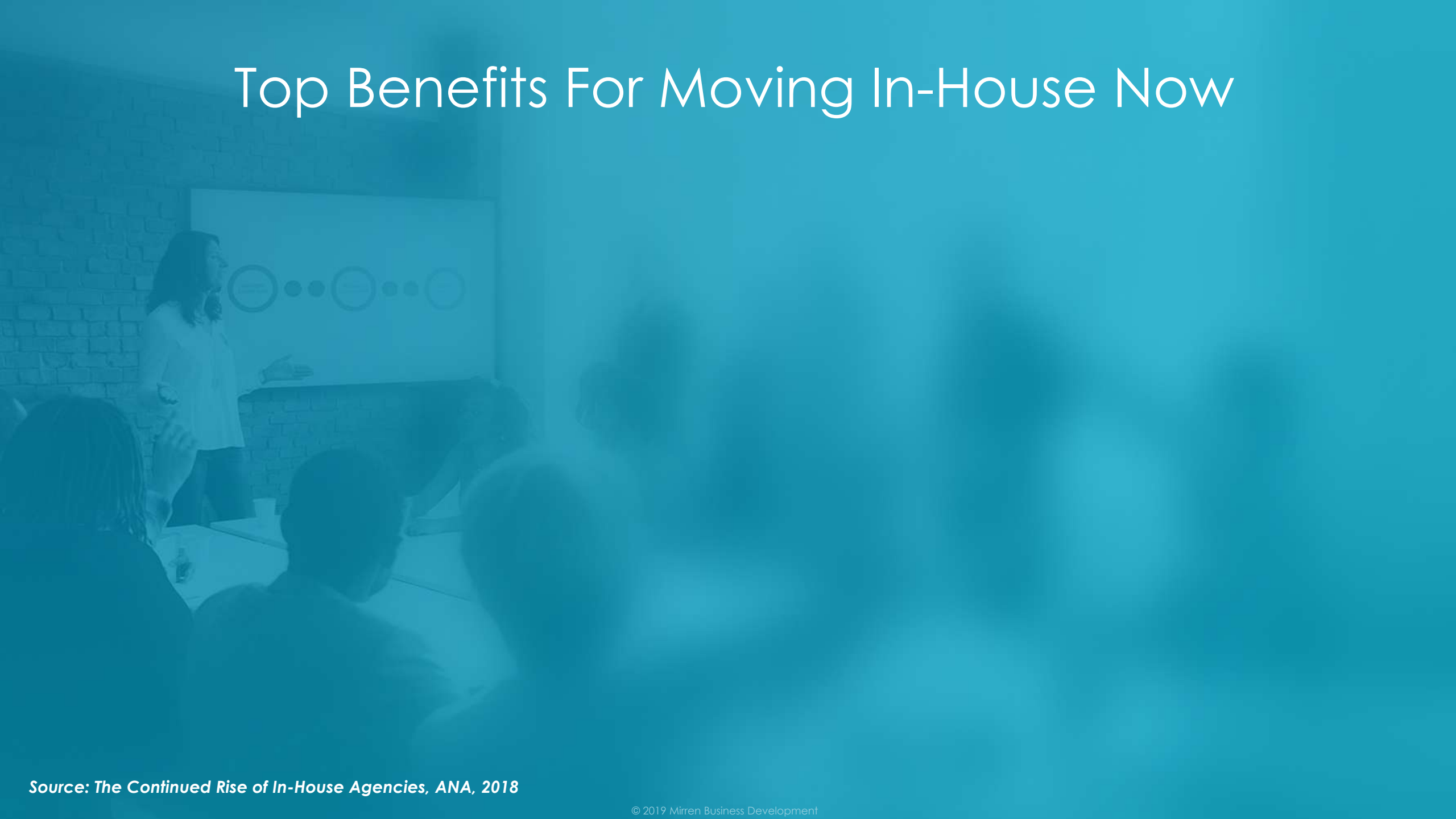
In 2013

Cost Efficiencies

Quicker Turnarounds

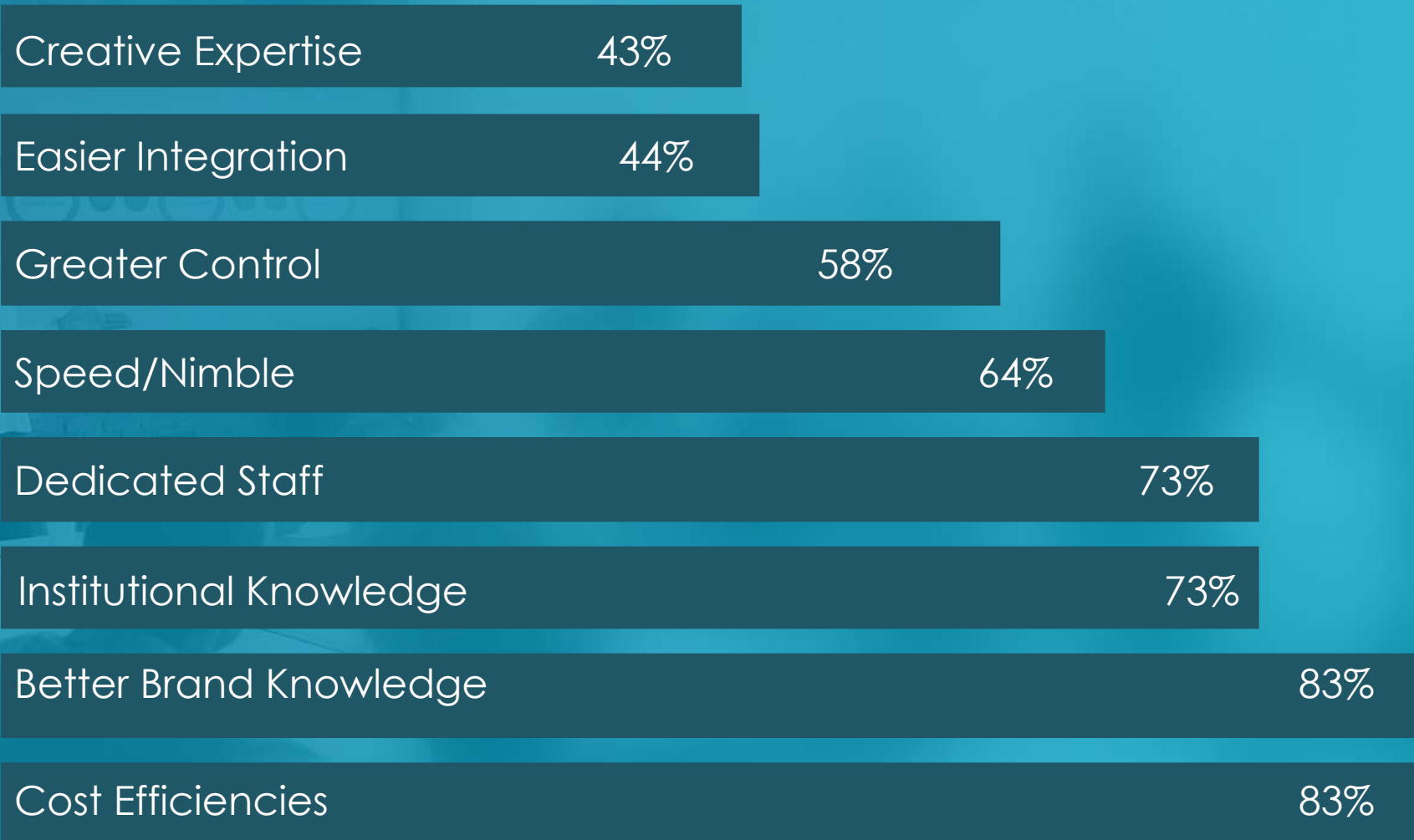
Transparency

Top Benefits For Moving In-House Now

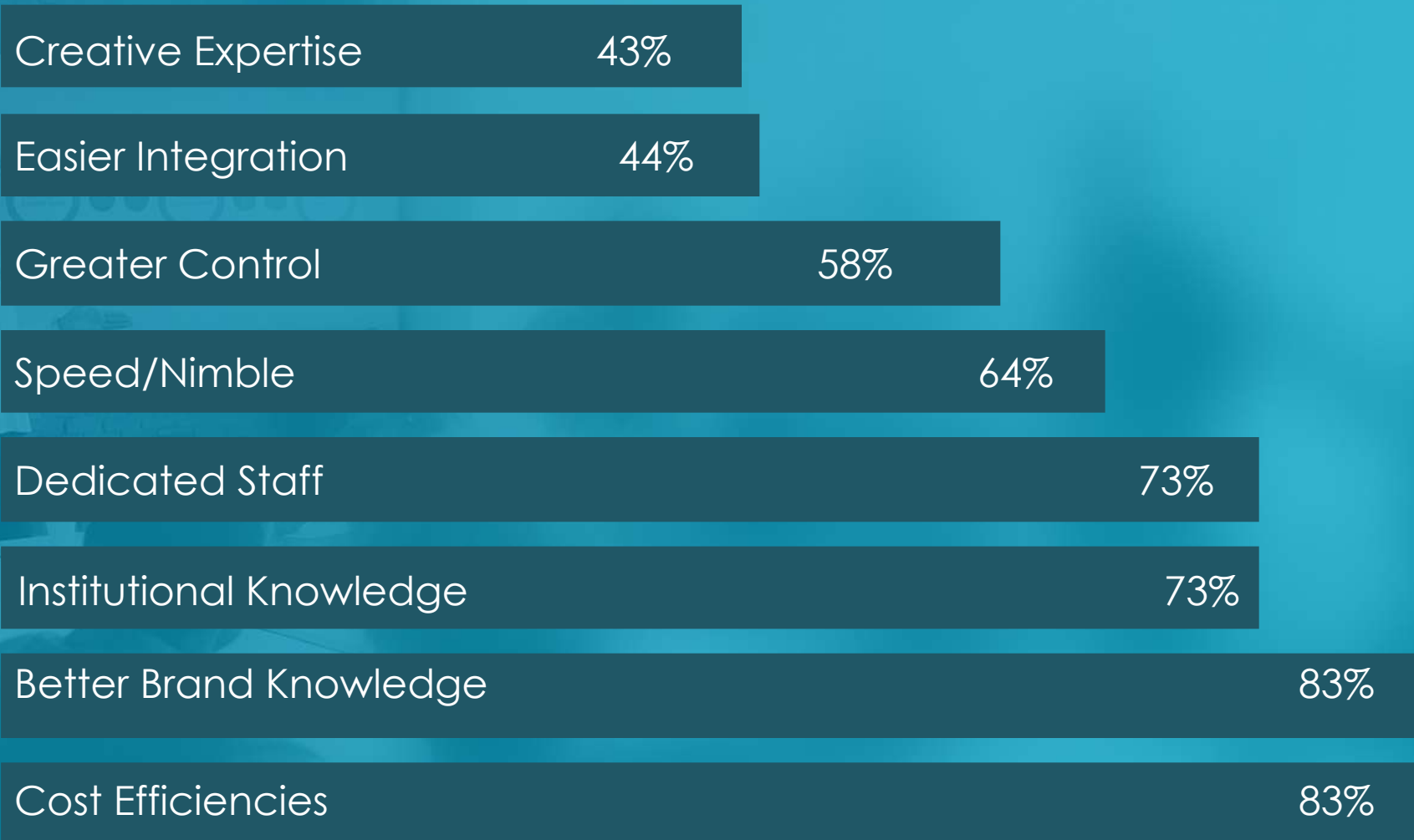


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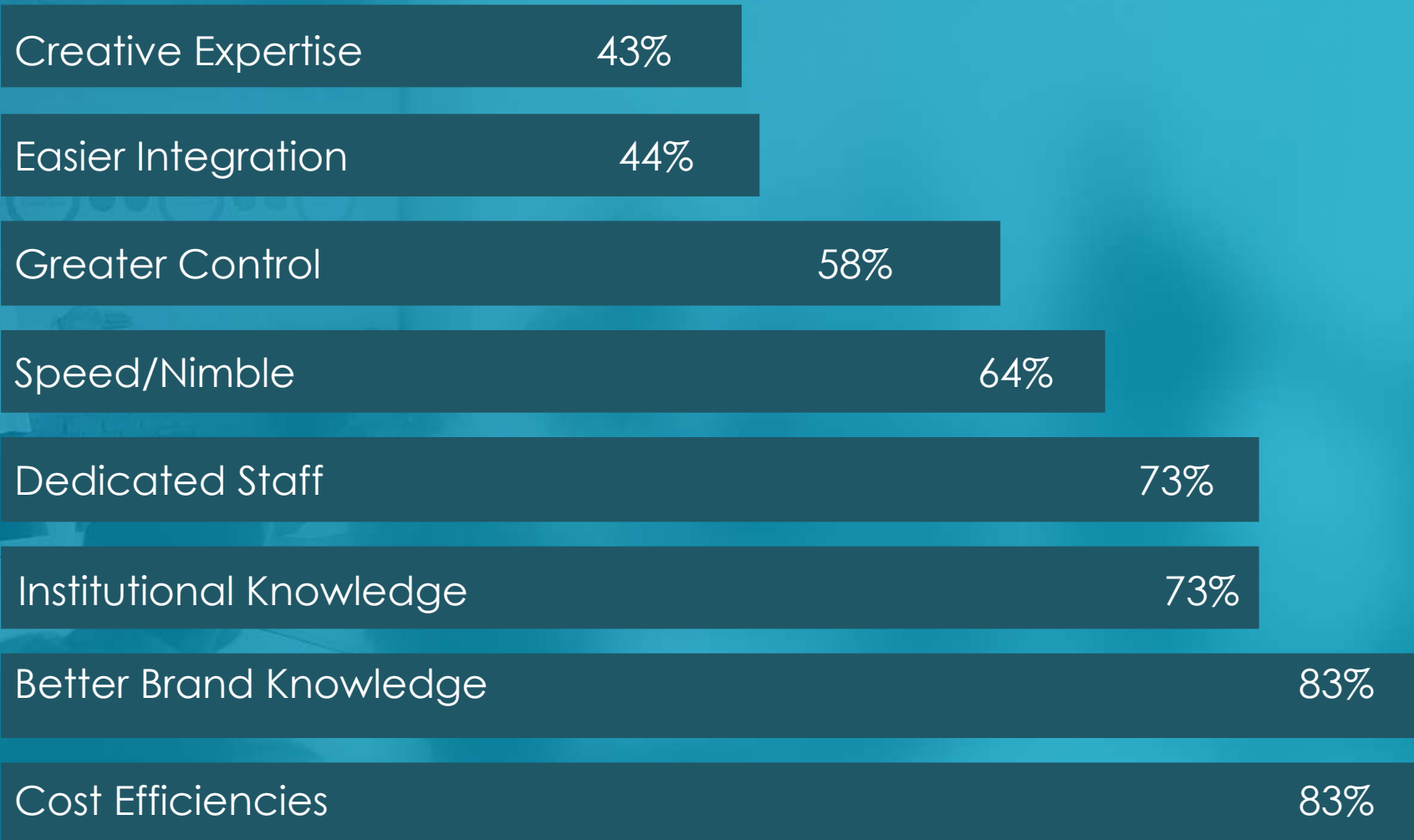
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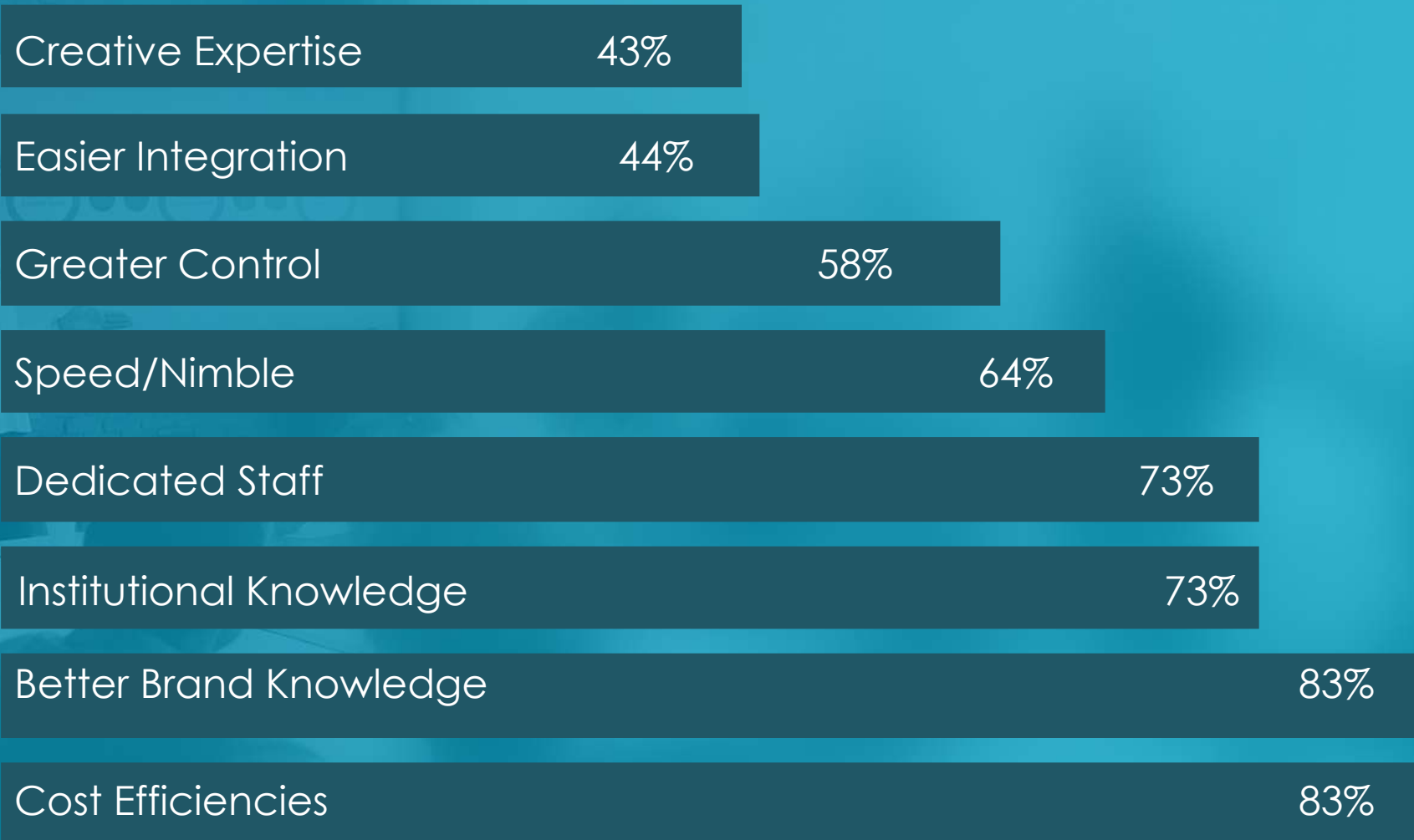
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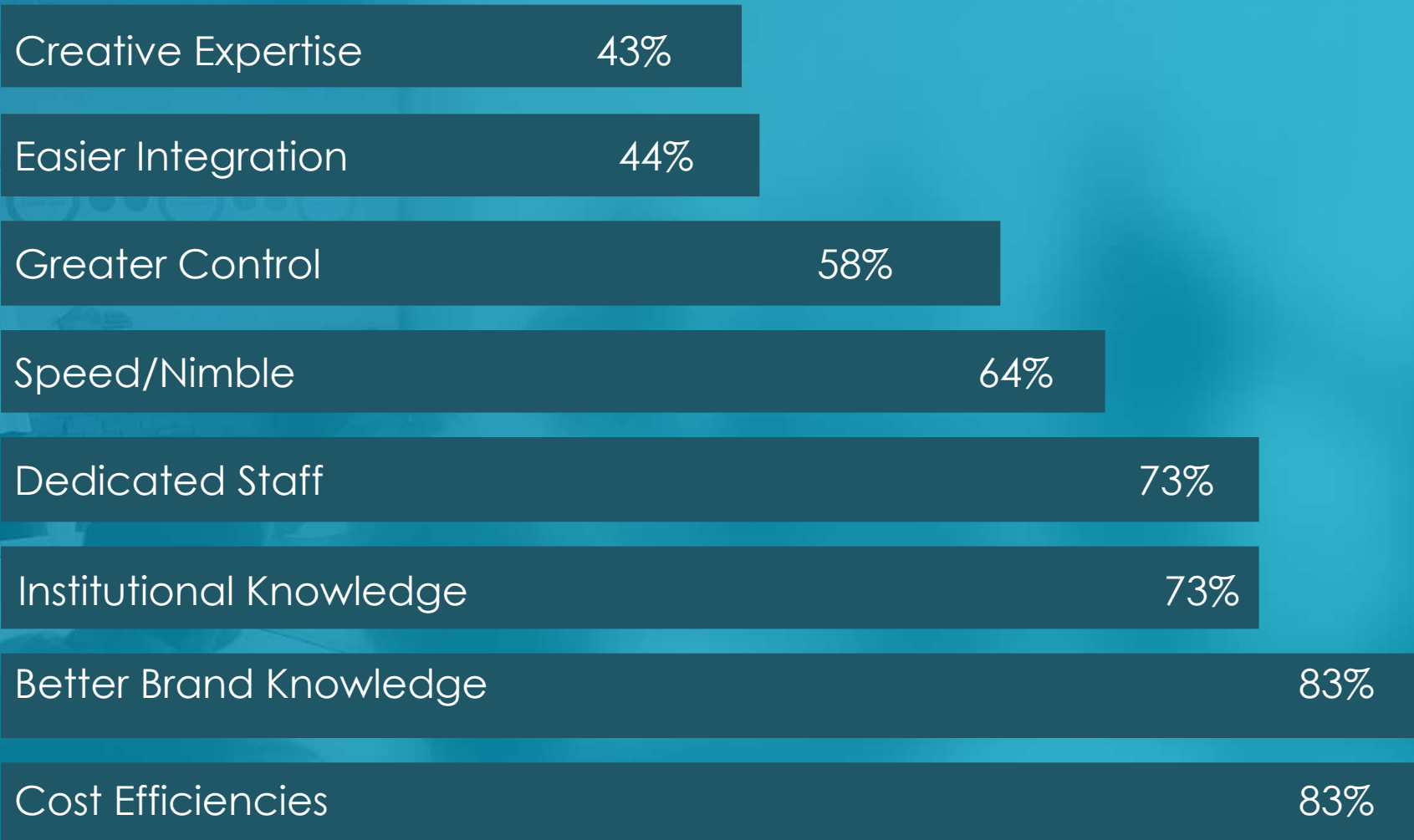
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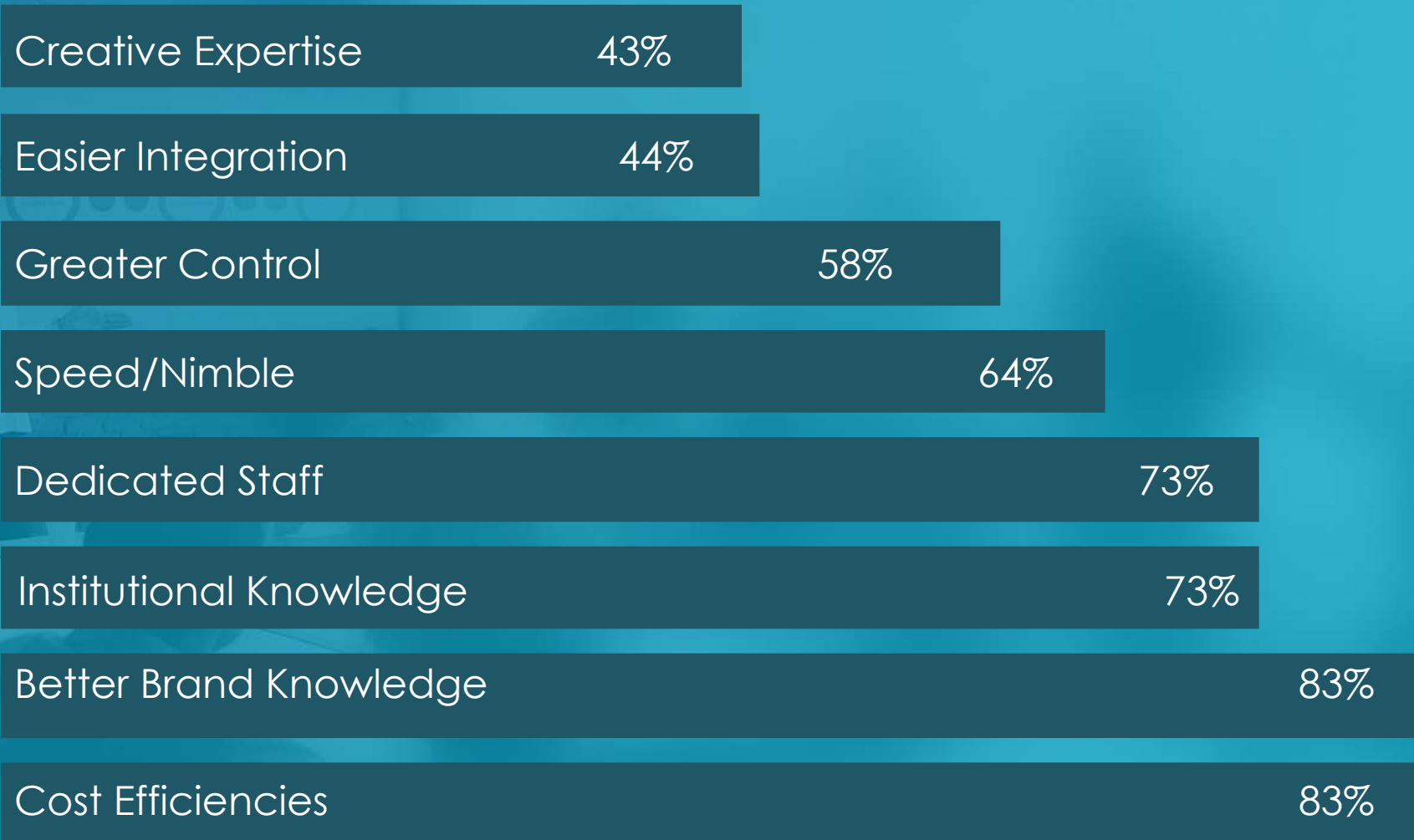
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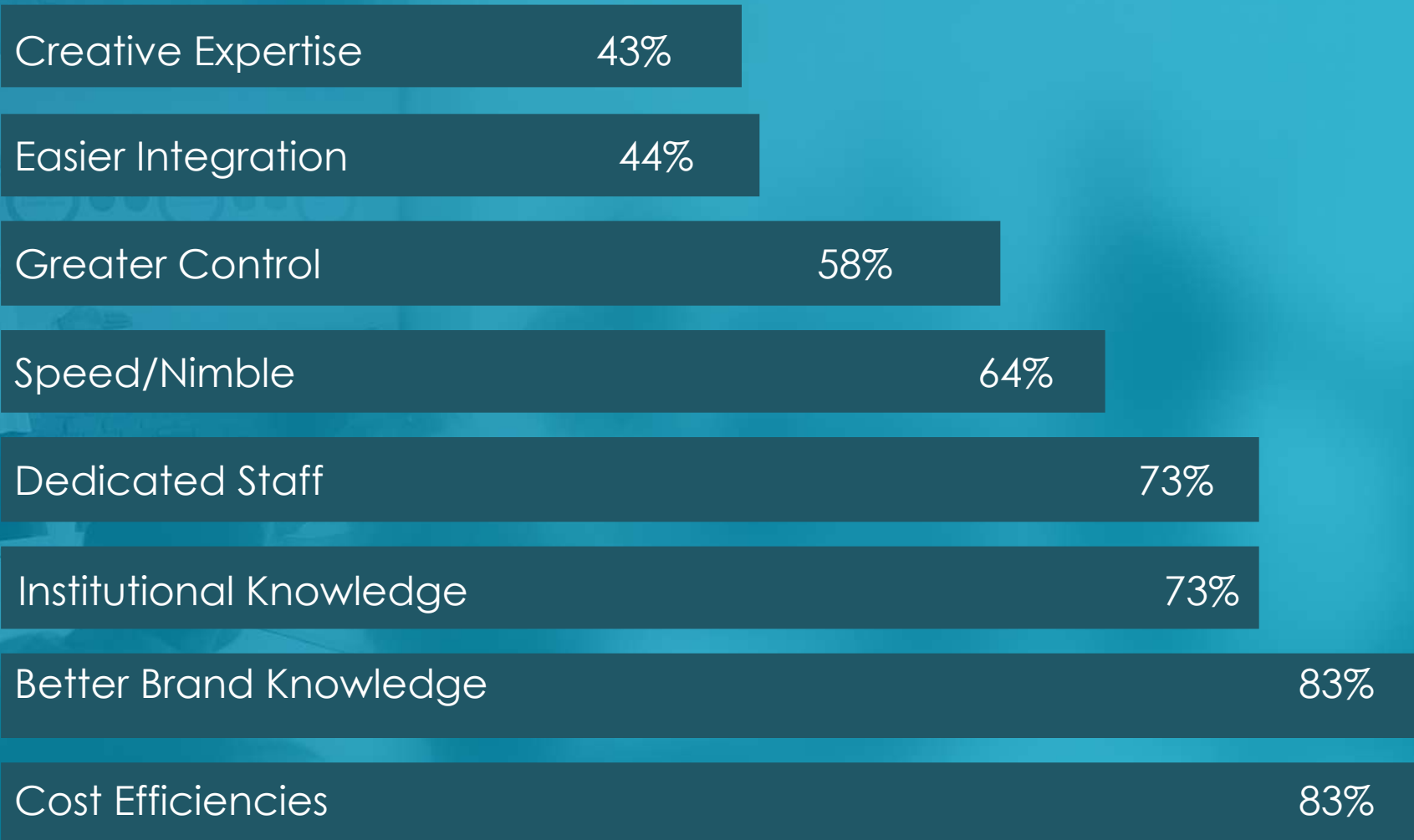
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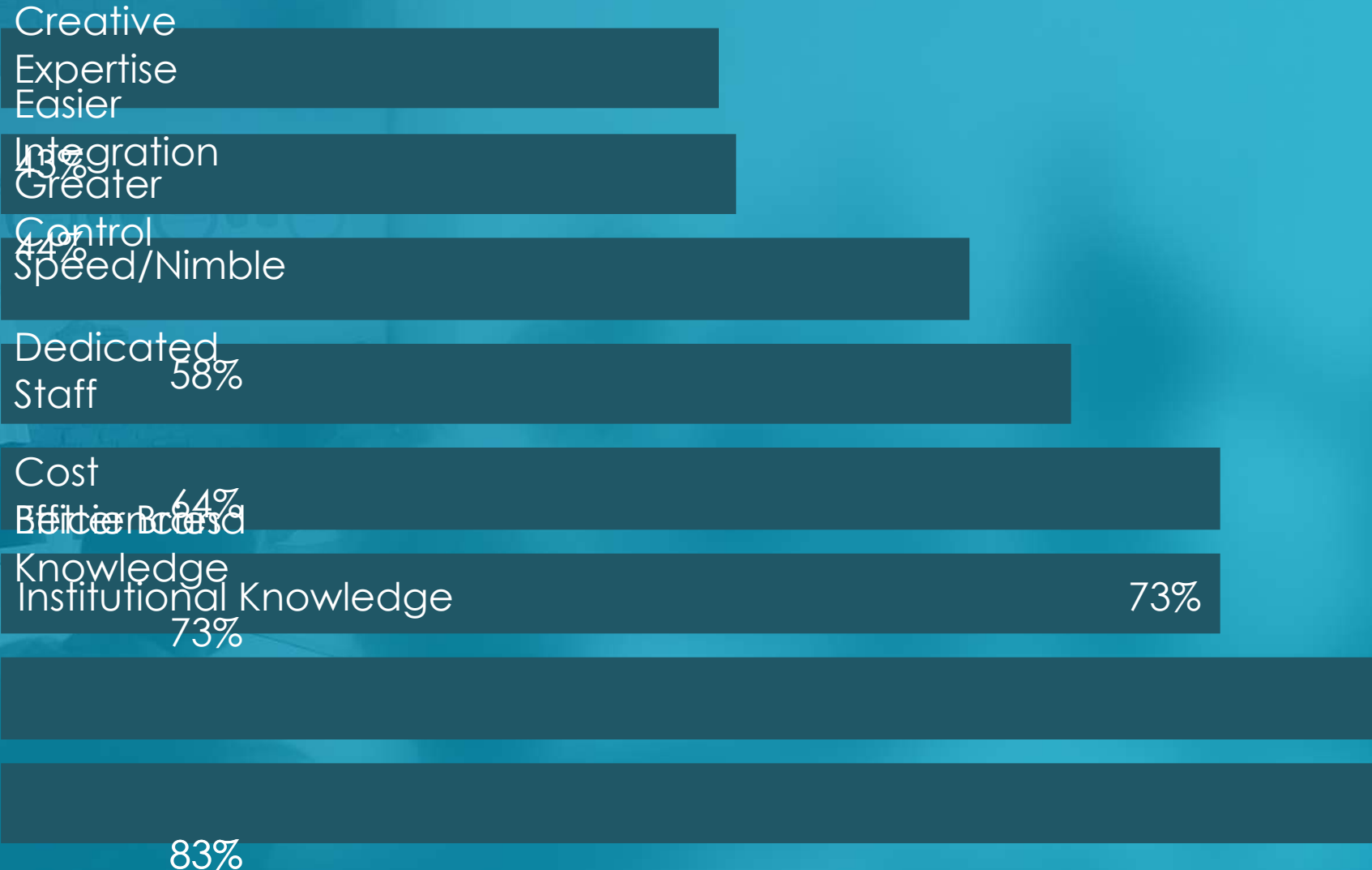
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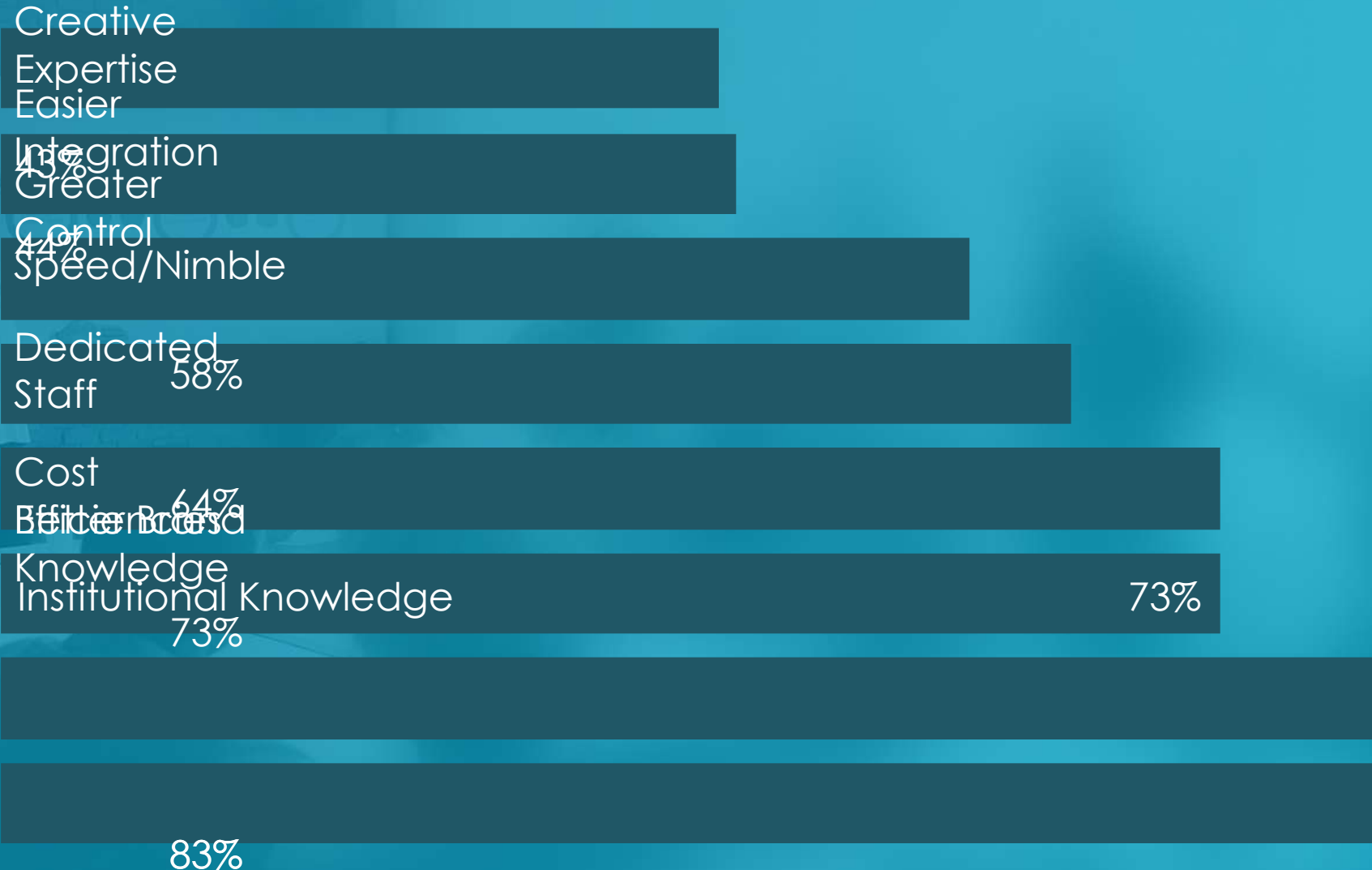
Top Benefits For Moving In-House Now



Top Benefits For Moving In-House Now



Top Benefits For Moving In-House Now





For Those Clients With In-House Agencies



For Those Clients With In-House Agencies

58% of Work is Being Done In-House

A blurred background image showing a woman in a white shirt standing at the front of a room, presenting to a group of people seated at tables. The room has a brick wall and a whiteboard with diagrams. The entire image is overlaid with a semi-transparent teal color.

“To Be Closer to Our Customers”



“To Be Closer to Our Customers”

“Data Ownership”



“To Be Closer to Our Customers”

“Data Ownership”

“Real-Time Responsiveness”

“To Be Closer to Our Customers”

“Data Ownership”

“Real-Time Responsiveness”

“Integration with Customer Service...”



Brands Feel They Need to Listen and Respond to Customers on a 24/7 Basis.

A woman in a white top is standing and presenting to an audience in a meeting room. The room has a brick wall and a whiteboard with a diagram of five circles. The scene is overlaid with a semi-transparent teal rectangle containing text.

“We want to be more in control of our
Customer Journeys.”

Karin Timpone, Marriott



Even Scary for Some Digital Agencies

Even Scary for Some Digital Agencies

27% of no longer work with digital agencies

Even Scary for Some Digital Agencies

27% of no longer work with digital agencies

Up from 13% Last year



“Data is the basis for our customer relationships”



“Data is the basis for our customer relationships”

”We need to take ownership of our data”



And the Stigma of In-House is Disappearing

Source: The Continued Rise of In-House Agencies, ANA, 2018

A blurred background image of a woman in a white shirt presenting to a group of people in a meeting room. The scene is overlaid with a semi-transparent teal filter. The woman is standing on the left, gesturing towards a screen or whiteboard. Several people are seated in the foreground, their backs to the camera, listening to the presentation. The room has a brick wall on the left and a whiteboard with some diagrams on the right.

Great Talent Is Defecting

Source: The Continued Rise of In-House Agencies, ANA, 2018



Great Talent Is Defecting

Better Pay/Benefits



Great Talent Is Defecting

Better Pay/Benefits

Better Working Conditions



Great Talent Is Defecting

Better Pay/Benefits

Better Working Conditions

Better Quality of Life

In-House Agencies



In-House Agencies

Have One Client — Shared Business Goals

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They Don't Need to Be a Profit Center

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Have One Client — Shared Business Goals

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Access to Data and Decision Makers

In-House Agencies

Have One Client — Shared Business Goals

They Don't Need to Be a Profit Center

Access to Data and Decision Makers

Faster/More Straightforward Approval Process

Most Still Create Some Separation



Most Still Create Some Separation



Most Still Create Some Separation



Most Still Create Some Separation



Yellow Fan
Studios

Spinn Creative Media

Most Still Create Some Separation



Yellow Fan
Studios

Spinn Creative Media

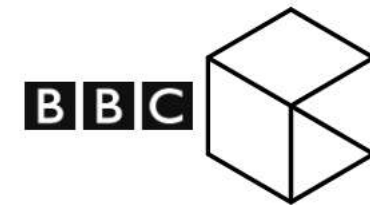


Most Still Create Some Separation



Yellow Fan
Studios

Spinn Creative Media





And These In-House Agencies Are Growing

Source: The Continued Rise of In-House Agencies, ANA, 2018



55% of In-House Agencies Added
Headcount in the Last Year

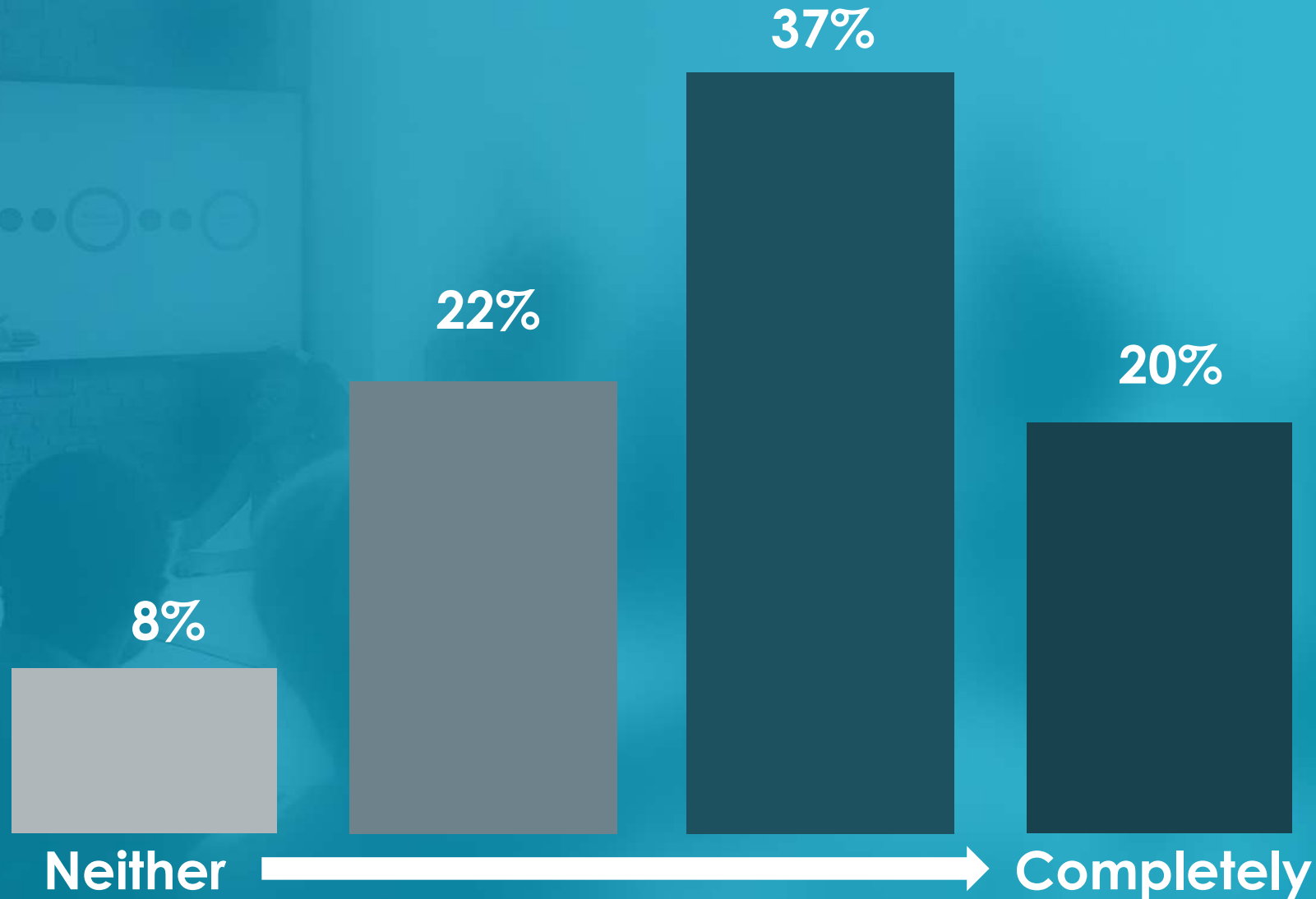


90% Say Workload For In-House Agencies is Increasing

90% Say Workload For In-House Agencies is Increasing

65% say by “A Lot”

In-House Agency Satisfaction



Source: *The Continued Rise of In-House Agencies*, ANA, 2018



But There Are Challenges with In-House



But There Are Challenges with In-House

Which Become Opportunities For Us

What to Bring In-House





What to Bring In-House

Managing Growth, Workload And Resources



What to Bring In-House

Managing Growth, Workload
And Resources

Sourcing Capabilities And Skill Sets

The background of the slide features a blurred photograph of a meeting. A woman in a white top is standing and gesturing, while others are seated around a table. The entire image is overlaid with a semi-transparent teal color.

What to Bring In-House

Managing Growth, Workload
And Resources

Sourcing Capabilities And Skill Sets

Handling Burstable Needs

Myopic

The background of the slide is a photograph of a meeting or presentation. A woman in a white top is standing and gesturing towards a group of people seated at a table. The scene is dimly lit, with the primary light source being the teal overlay. The overall mood is professional and collaborative.

Myopic

Cross Cultural References – Tone Deaf

Myopic

Cross Cultural References – Tone Deaf

Broader Consumer Trends & Insight

Myopic

Cross Cultural References – Tone Deaf

Broader Consumer Trends & Insight

Don't Invest In Creative R&D



Data Overload

Source: The Continued Rise of In-House Agencies, ANA, 2018



90% of Brands Will
Continue To Use Agencies

The background of the slide is a photograph of a group of people in a meeting, overlaid with a semi-transparent teal color. The text is centered within two dark teal rectangular boxes.

However...

The Way Clients Use Agencies May Have
Forever Changed

"The AOR, full-service Client/Agency relationship, is no longer the norm. It will be project-based, freeing Agencies from the RFP/pitching hamster wheel, allowing them to contribute in a more meaningful way. "

–Bob Liodice, ANA



Agencies That Are Smaller,
More Specialized And More Flexible
Are Likely To Do Well

“Act as your client’s missing piece,
accomplishing what they wouldn’t be able
to do on their own.”

–Paul Fahey, Overit



How?



Embrace It!

Source: The Continued Rise of In-House Agencies, ANA, 2018



Embrace It!

Identify The Opportunity For Your Agency To be a Supplement to In-House

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Identify The Opportunity For Your Agency
To be a Supplement to In-House

Simplify Your Model — Make Your Agency
Easy to Add



Embrace It!

Identify The Opportunity For Your Agency
To be a Supplement to In-House

Simplify Your Model — Make Your Agency
Easy to Add

Optimize the Process



Dual-Housing

Dual-Housing

Where Each Team Has a
Competitive Advantage

Audits



Audits

Engagements

Audits

Engagements

Products



Audits

Engagements

Products

Workshops



Develop Pricing That Is Flat Fee + Added Value Add-Ons

Embedded Team Members In-House

Embedded Team Members In-House

“The Integrator”

Embedded Team Members In-House

“The Integrator”

“The Strategist”

Embedded Team Members In-House

“The Integrator”

“The Strategist”

“The Coach”

Occasion Based Strategy



Occasion Based Strategy

For Brands

The background of the slide features a blurred photograph of several people in a meeting or workshop setting. They appear to be looking at a screen or document. The entire image is overlaid with a semi-transparent teal color. Three dark teal horizontal bars are positioned across the middle of the slide, each containing white text.

Occasion Based Strategy

For Brands

For Launches

The background of the slide features a blurred photograph of several people in a meeting or office setting. A semi-transparent teal overlay covers the entire image, with four horizontal dark teal bars containing white text.

Occasion Based Strategy

For Brands

For Launches

For Editorial Strategy/Content



Subscription-Based Intelligence



Genuine Target Audience Insight

A blurred background image showing a woman in a white shirt standing and presenting to a group of people seated around a table in a meeting room. The scene is overlaid with a semi-transparent teal filter.

Systematize Collaboration

The background of the slide is a photograph of a meeting in progress. A woman in a white shirt is standing and speaking to a group of people seated around a table. The scene is dimly lit, and the entire image is overlaid with a semi-transparent teal color. Two dark teal rectangular boxes are positioned horizontally across the center of the slide, containing white text.

Systematize Collaboration

Dashboards & APIs



Systematize Collaboration

Dashboards & APIs

Templated Meetings & Workshops

Audits



Audits

Projects



Audits

Projects

Products



Audits

Projects

Products

Workshops

New Models



New Models

Hybrid Approaches

The background of the slide features a blurred photograph of several people in a meeting or office setting. A semi-transparent teal overlay covers the entire image, and three dark horizontal bars are positioned across the center, each containing white text.

New Models

Hybrid Approaches

Productized/Outcome

New Models

Hybrid Approaches

Productized/Outcome

Appointment-Based
Perspective/Intervention