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FEATURE

## **An inside job: when and how Power 100 marketers are going in-house**

Campaign's Power 100 marketers reveal the functions they're taking inside their own walls and why external agencies still matter as part of a hybrid model.



Formula E's chief marketing officer, Ellie Norman, no longer waits for the next agency update call before the motorsport brand jumps on cultural moments.

That's because the CMO's own team is able to do it instead, in real time. "Speed is non-negotiable, so a lot of our production, publishing and data analysis now happens in-house," she says.

Norman is one of the many marketers featured in Campaign's Power 100, which lists the most influential UK brand leaders in 2025, who use in-house agencies or teams to deliver certain briefs instead of external agencies.

When Campaign asked how important in-housing would be to the cohort in the next year, out of the 49 marketers answering, 90% said they already used internal teams to perform functions traditionally carried out by an external agency. Of this group of 44 using in-house teams, meanwhile, just under a third (30%) said it would play an increasingly central role for their brands in the coming year.

It is likely that many have already been bolstering those internal teams over the past year, with just under half of UK in-house agencies increasing their headcount in 2024, according to research by the In-house Agency Leaders Club.

The ways in which those in the Power 100 use internal teams range from design and social to account management, planning, creative and media buying.

And from a hiring perspective, talent now sees it as a viable way to develop their career, according to **Zoe Edwards**, recruiter at **The Industry Club**: "It used to be a concern that going in-house was second rate but it's now really appealing. Candidates will say, 'I'll only move if it's brand side.'"

Patrick Burgoyne, co-founder of the In-House Agency Leaders Club, also suggests that in-housing is experiencing a reputation makeover. Previously viewed as a function to cover "lower tier work" for brands, and by some as "a bit of a dead end" for talent, internal teams have evolved to be recognised as "high-level strategic partners", he says. The industry is beginning its "fourth wave of in-housing," a report by marketing consultancy Overline declared in June 2025.

Hybrid models, combining both external and in-house agencies, are “dominant” for the time being, but large brands with “sizeable” budgets are expected to move away from this and towards increasing their in-housing further as AI and automation develops.

Ad placement and targeting tools such as Google’s Performance Max and Meta’s Advantage Plus are “early indicators of the future of marketing activation: platform-first, AI-driven creative and media buying, optimized to sales data in real time”, according to Overline.

## **Banks and supermarkets leading the way**

The Power 100 marketers using in-housing span organisations across the airline, technology, financial, retail, food, drink, fashion, sport, energy, telco and charity sectors.

According to ISBA, brands are particularly focused on in-house functions as their handling of data – covering customers, their own business, and performance – develops, as well as in cases where the speed of communication with audiences needs to keep pace with changing products.

Nick Louisson, director of agency services at ISBA, says: “Advertisers see the role of data as being really important.”

He adds: “Sharing sensitive business data with external parties requires a long process for ensuring security and confidentiality of that data. The compliance and security process is lengthy, advertisers can be more agile when the use of the data is done in-house.”

As a consequence, companies that handle large amounts of data, such as financial services, are leading the way for in-housing. He adds: “Messaging, deals and interest rates change frequently; they’re also highly regulated. Those companies have a greater imperative to bring it in-house.”

AJ Coyne, vice-president of marketing and growth at Monzo, which also works with external shops Starcom and BBH for media and creative, respectively, explains how this plays out at the challenger bank. “In-housing is super important for us. We continue to invest a lot in headcount there. Things change every 15 minutes for a business like ours, so it’s difficult for [external agencies] to keep up with that,” he says.

“We’ve got a lot of the creative talent already, with the exception of some disciplines like motion, but we are investing in hiring studio managers, and in really strong production capabilities that we haven’t had before, especially in a world of AI.”

Retail is another vertical where recruiters are seeing more in-housing, **according to Edwards**, because of its fast pace due to price changes, seasonal pushes and promotions, which benefit from an internal team that can turn around the volume of assets required.

Sainsbury’s announced it was expanding its internal creative agency, Zest, in 2024 – and the supermarket is now “almost complete in terms of our in-housing journey”, Mark Given, its chief technology, data and marketing officer, says.

“We’re really proud of this capability with over 150 colleagues working across design, account management, planning and production,” he adds, while highlighting the work that the brand’s lead external creative agencies, New Commercial Arts and T&P continue to do, alongside PHD for media planning and buying.

## **Need for speed**

Speed and efficiency continue to be key drivers for in-housing – roughly one in six of the Power 100 marketers mentioned these factors while explaining the importance of their internal teams.

Burgoyne says that in-house leaders are often working for brands where there is a transition to more frequent marketing. “There is a shift from big campaigns at certain points of the year to having an ‘always-on’ model where there’s a need for constant, consistent communication,” he says.

“That plays into having a team employed with deep brand knowledge and the ability to be flexible, fast and efficient.”

Samsung’s chief marketing officer for Europe, Benjamin Braun, says in-housing “gives us speed and control” and is “critical” to how the technology business operates across the region.

“The CMO’s role is to ensure every touchpoint meets or exceeds expectations, and that’s much easier when creative, media, and data teams sit close to the brand,” he adds.

Braun established Studio S, the brand's in-house content studio, when he joined the company in 2019. This, he says, has not only increased agility but cost efficiencies too when producing video and photography. But, alongside creative, media and other in-house teams, Braun stresses the role of external shops too. "We continue to partner with specialist agencies when we need additional capacity, deep local market insight, or large-scale production support that benefits from their expertise," he adds.

Earlier this summer, Iris created "Unmissable moments", including two films to promote Samsung UK's launch of the Galaxy Z Fold7, and during the 2024 Paris Olympics and Paralympics the brand worked with BBH London for its campaign centred on athletes taking victory selfies. The advertiser's UK CRM agency is Digitas and it works with Starcom on media.

At VodafoneThree, chief brand officer Maria Koutsoudakis says the integration of two in-house teams – Vodafone's media and Three's creative – as part of the merger of the two companies in May 2025 has produced "incredible brand building capability at pace and efficiency".

However, the company's first joint campaign – "Two networks are better than one", featuring a 30-second film from each of the two brands – was created by its external agencies; Leo UK for Vodafone and Wonderhood Studios for Three. Media was handled by Carat, for Vodafone, and Zenith, for Three.

## **Hybrid: a happy medium?**

All of the Power 100 marketers who in-house, also work with external agencies, to varying degrees.

Tony's Chocolonely has a global in-house creative team, which has been in place for nearly two decades, but also works with House Of Oddities as its UK creative shop, "TikTok-first" agency Nonsensical on social and Mediaplus as its global media agency.

Nicola Matthews, head of marketing for UK and Ireland at the confectionery company, explains the approach it takes: "A brief will come to the internal team first but if we think we will get a better result by outsourcing to our brilliant network then we will."

She adds that “more and more we are looking to build the right network of external partners, or ‘creative friends’ as we call them, to support our capabilities... as we scale globally as there’s only so far our small-but-mighty in-house team can stretch”.

In the telecoms space, Cilesta Van Doorn, chief brand and marketing officer at BT, takes the same stance. “In-housing is hugely important for us in the year ahead, but always as part of a hybrid model. The sweet spot is the mix: having an in-house agency gives us speed and consistency, but the hybrid model ensures we stay ambitious, diverse, and creatively restless,” she says.

BT, which is reviving its eponymous brand, this summer hired Uncommon Creative Studio to handle its creative account. The wider group already works with creative shops Saatchi & Saatchi, on EE, and Adam & Eve/DDB, on BT Business. The brand says it is moving towards “combining the strengths of our in-house marketing and brand teams with the expertise of trusted agency partners”.

Jo McClintock, vice-president of brand and marketing at Trainline, says that it in-houses work if the team can meet the brand’s “high” standards. “Our in-house design studio – 20 talented writers, creators, videographers, designers, and illustrators – works alongside our media buying agency to deliver standout campaigns,” she adds.

The company also works with Mother London for UK projects, Wieden & Kennedy Amsterdam for global campaigns and Wavemaker for media.

Burgoyne says that there is a shifting perception of in-house teams and their partnerships with agencies, particularly when it comes to creative. “It’s much less common now to have a situation where an external agency comes up with a big campaign idea, and then hands it over to the internal agency to execute further, without the latter being involved at all in the process.

“What in-house agencies are asking for – and expecting – are collaborative, mutually respectful relationships with external creative agency partners where both are clear on their roles and are working together to make great work.”

For Channel 4’s own ads and idents, created solely through its in-house agency 4Creative, the work benefits from the team proximity, according to chief marketing officer Katie Jackson. “You can’t beat the awareness of what a brand is about unless you’re there in the trenches. Second to that, I would never change it because of the serendipitous opportunities that having that team in-house afford you,” she says.



4Creative's executive creative director, David Wigglesworth, for example, came up with the idea to use AI for the promotional campaign for Open House: The Great Sex Experiment from a conversation with Channel 4's commissioning editor in the canteen.

Under the previous ECD, Lynsey Atkin, who went on to co-found Baby Teeth, 4Creative picked up a Film Lions Grand Prix at this year's Cannes Lions awards for "Considering what?", a 140-second film made for the Paris 2024 Paralympic Games.

However, not all brands are convinced that in-housing is for them, with marketers who take this stance saying they prefer to focus on outside perspectives to avoid being stuck in the brand's bubble.

Burger King UK's chief marketing officer, Katie Evans, says: "In my experience, our agencies sitting outside of the business gives them broader creative and cultural reference."

Kevin McNair, marketing director at KP Snacks, agrees. "I much prefer to work with a range of agencies and use the power of the people they have in their businesses rather than a team within."

## **In-housing in the next year – 'a state of flux'**

Social and creative teams are continuing to be popular functions for internal teams.

Edwards says she has seen a 50% rise in the number of senior in-house creative roles when recruiting over the past 12 months.

"We've seen the biggest increase in the number of executive creative directors, creative directors and conceptual creative teams being hired. In-house agencies are getting to a point where they were previously production studios and they now want to do more conceptual work," she says.

Meanwhile in-house roles for "social-first" and "culture-first" work are also popular – areas that are "quite different to what above-the-line agencies are doing. It's a lot faster. It requires quicker turnarounds," she adds.

Louisson predicts more in-housing in the next year, but also an increased need for agency support to weather an unpredictable and fragmented media landscape.

“There will be more in-housing as people want to gain control over certain elements that they start becoming more confident in, but just as they get more confident in in-housing one element, there will be other new, emerging trends that they desperately need agency support with,” he says.

While 2025 has been a busy year for in-house roles, **Edwards** is predicting wider economic challenges will cause this to slow, prompting a shift to hybrid in-house positions.

“We’re seeing an emphasis on unicorns who can do everything in a budget conscious economy, – [brands] looking for people in-house who can do creative and also the editing, strategists who can write, and people who can start using more AI within their roles,” she says.

For Burgoyne, the nature of in-housing means its path is never consistent. Brands are always re-evaluating their needs and trying to build the best teams – inside and outside their business – accordingly.

“It’s not always a straight line,” he says. “Every in-house agency is different, and every in-house agency is constantly evolving and looking at what its role is within the business. It’s always in a state of flux.”

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In-housing rarely follows a single path. At **The Industry Club**, we work with brands to plan, build and evolve in-house and hybrid models — from senior hiring and team design through to long-term capability planning.

If you’d like to explore how we support organisations navigating these decisions, or to discuss your own in-housing challenges, please get in touch by emailing

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