Creative & Communications Association

Market Intelligence

Pathfinder Pulse Survey Q2 2026

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Background and Objectives

The primary objective of the Pathfinder Pulse survey is to assess both current and anticipated business conditions affecting the creative and communications industry in Ireland.

To achieve this a quarterly pulse of Chief Executive Officers across business operating in media, creative, PR, experiential and digital communications is carried out by Amárach on behalf of The Creative & Communications Association.

The findings are an important bellwether for business sentiment as fluctuations in marketing spend reflect wider market confidence. They are also important for external stakeholders helping to inform policy makers and regulators on key policy positions, aligning our sector with other business sectors on key policy positions.

This is the fourth survey which has been completed since the survey started in May 2025, allowing for the building of a robust dataset and a long term indication of key business trends and shifts which have emerged over the past twelve months.

Methodology

Fieldwork dates

10/07/2026 – 27/07/2026

Sample Definition

CEOs, leaders and founders.

Methodology

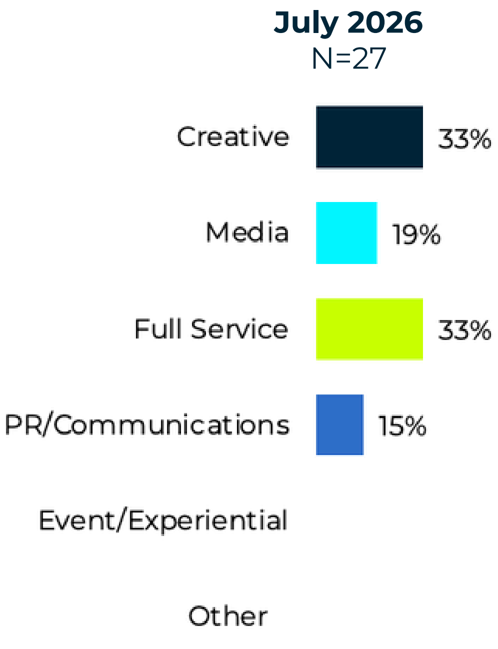
Online Survey of CEOs from member companies of the Creative & Communications Association.

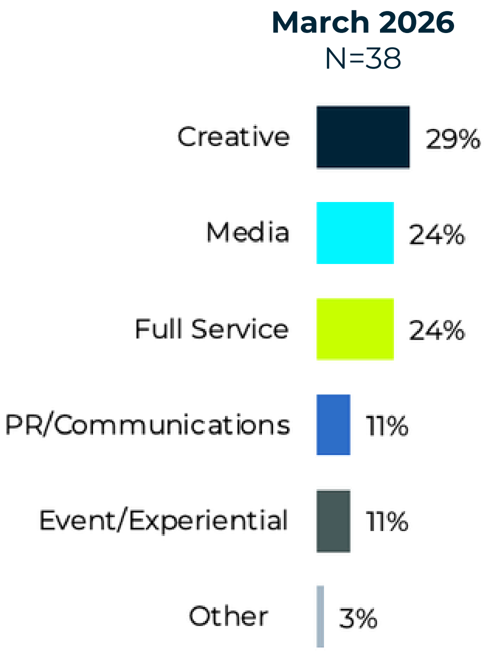
Sample Size

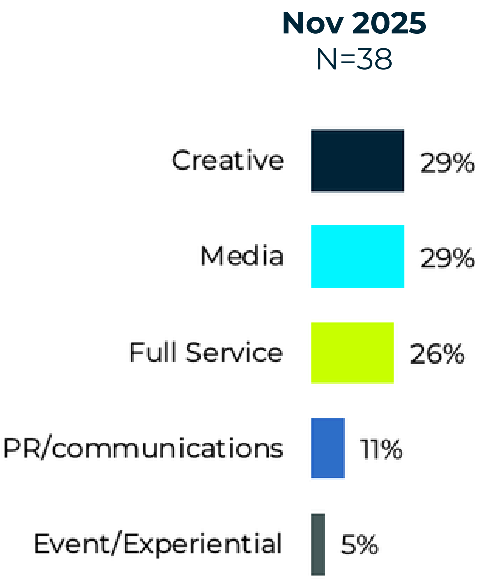
A total of 27 CEO surveys were completed reporting for July 2026. These responses represent the views of 32 individual companies.

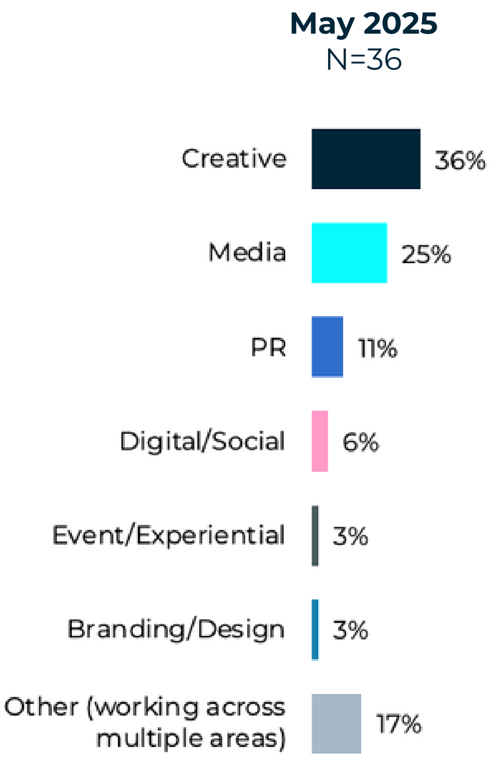
Sample Profile

Base: All respondents









Q11. Is your agency mainly?

Trend Analysis

Trend Analysis Across Four Surveys

The completion of four Pathfinder Pulse Surveys since the first survey was first conducted in May 2025, allows for key trends emerging over the course of the past twelve months to be analysed.

These results have been interpreted in the context of wider developments affecting the creative and communications sector over the period, including sustained economic uncertainty, the mainstreaming of artificial intelligence in marketing workflows, a cooling labour market and a changing regulatory agenda.

1 Outlook on client spending has remained positive despite global trading environment

- Expectations for client spend with Creative & Communication Association member companies for the rest of the year remain positive, with a net score of +30 recorded in July 2026. This reflects consistent positive sentiment recorded over the past twelve months, and an increase from the +11 score in May 2025.
- The outlook for total marketing spending by clients (with member companies or otherwise) stood at -15 in July 2026, as compared to -12 in May 2025, reflecting broader market caution rather than any weakening in client relationships.
- When asked to review client spending over the past year with Creative & Communication Association businesses, the score remains unchanged between Q1 2026 and Q2 2026, even as external tariff and cost pressures continue. While Q3-Q4 2025 had been close to neutral, a net spending score of -11 was observed in March 2026, a drop which coincided with the broader downturn in sentiment following the outbreak of conflict in Iran in February 2026.

2 Expectations for client retention and new business acquisition hold steady

- The outlook for client retention for the rest of the year remains strong at +15 in July 2026, a trend which has been consistent over the course of the past 12 months (with scores ranging from +8 in May 2025 to +18 in March 2026).
- The outlook for new business acquisition stands at +26 in July 2026, as compared to +33 in May 2025.

Trend Analysis Across Four Surveys

3 Cost pressures remain but are easing

- The net score in the non-salary cost of doing business has improved by 13 points over the course of the last year, but concerns remain strong with sentiment standing at -48 in July 2026.
- Concerns on salary costs have eased by 17 points, as compared to May 2025, but remain high with a -30 score observed in July 2026.
- Sentiment around employee retention is positive, rising by +12 in July 2026, reflecting a positive trend observed over the course of the year. The outlook for employee recruitment has also been positive over the past year, ranging from +16 in May 2025 to +23 in July 2026.
- Expectations for net profitability stand at +4 in July 2026, a recovery of 6 points since March 2026. This represents a drop, however, when compared to the +17 result recorded in May 2025.

4 Regulatory concerns remain prominent

- While sentiment on the overall impact of government policies has dropped from a score of -29 in November 2025 to -8 in July 2026, concern remains over the impact of public sector procurement rules, employment and HR compliance requirements, and the rate of taxation.
- Concern also remains high with regard to the impact of AI and copyright law; the regulation of consumer brands, and the Official Languages Act. Note that questions on specific regulatory issues were only asked in March and July 2026.

5 Resilience in the sector despite external pressures

- Sentiment about the outlook for the sector as a whole has improved over the course of the year, rising from -28 in May 2025 to -4 in July 2026 (the highest score of the past year). The overall arc of the results of the past year reflects a sector that has absorbed market changes and an uncertain global landscape without losing confidence in itself.

Trend Analysis

Net Scores Over Four Pulse Surveys

Net scores are calculated as the percentage giving a positive response minus the percentage giving a negative response. Figures are percentage points.

Measure	May '25	Nov '25	Mar '26	Jul '26
Client spending with agency, year to date (Q1)	0	-3	-11	-11
Expected spending with agency, rest of year (Q2)	23	37	11	30
Clients' total marketing spending, this year (Q3)	-12	19	-11	-15
New business acquisition (Q5)	33	39	42	26
Client retention (Q5)	8	13	18	15
Employee recruitment (Q5)	16	21	24	23
Employee retention (Q5)	0	6	13	12
Salary costs (Q5)	-47	-34	-21	-30
Cost of doing business, non salary (Q5)	-61	-58	-58	-48
Regulatory compliance burden (Q5)	-50	-37	-37	-29
Profitability (Q5)	17	26	-2	4
Outlook for the overall sector (Q5)	-28	-16	-16	-4
Impact of government policies (Q7a)	n/a	-29	-16	-8

Main Findings (Q2 2026)

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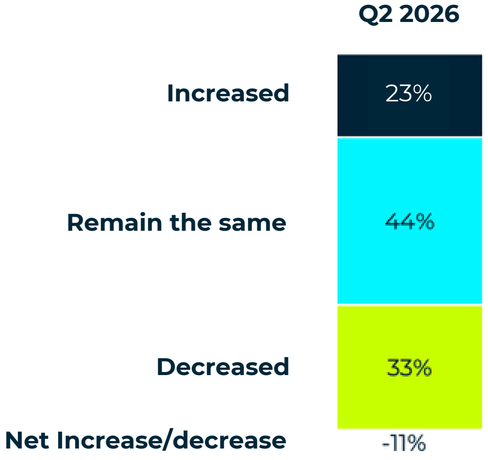
Main Findings

Client Spending Outlook: net (-11%), unchanged from Q1. Businesses operating in the media are still demonstrating positive growth, and those delivering creative are also showing an increase this quarter.

Base: All respondents - 27



Q1. Since the start of this year, has client spending with your agency increased, decreased or remained the same compared to the same period last year?

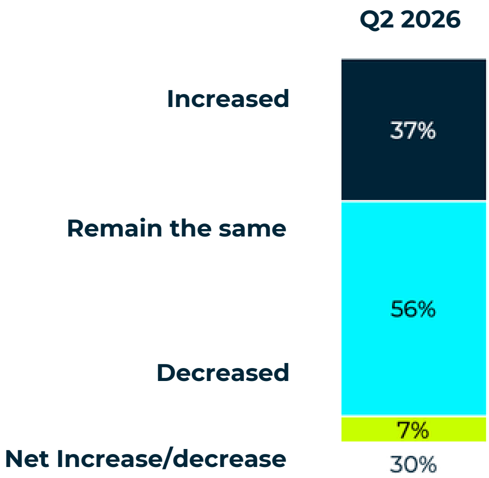
Companies providing a full suite of services are reporting slightly less decreases compared to Q1 suggesting a stabilisation in client spend.

	Business Type		
	Creative	**Media**	**Full Service**
N=	*9*	*5*	*9*
Increased	12%	60%	11%
Remain the same	44%	0	67%
Decreased	44%	40%	22%
Summary			
Net Increase/Decrease	-33%	20%	-11%

Main Findings

Companies remain optimistic for the remainder of the year. Creative has shown the strongest net optimism (+40%) alongside Full Service (+11%). Media is reporting a slight decrease (-13%) when compared to Q1 results.

Base: All respondents - 27



Q2. Thinking about the rest of the year, do you expect client spending (current plus new) with your agency to increase, decrease or remain the same?

	Business Type		
	Creative	**Media**	**Full Service**
N=	*9*	*5*	*9*
Increased	33%	40%	33%
Remain the same	56%	40%	67%
Decreased	11%	20%	0
Summary			
Net Increase/Decrease	22%	20%	33%

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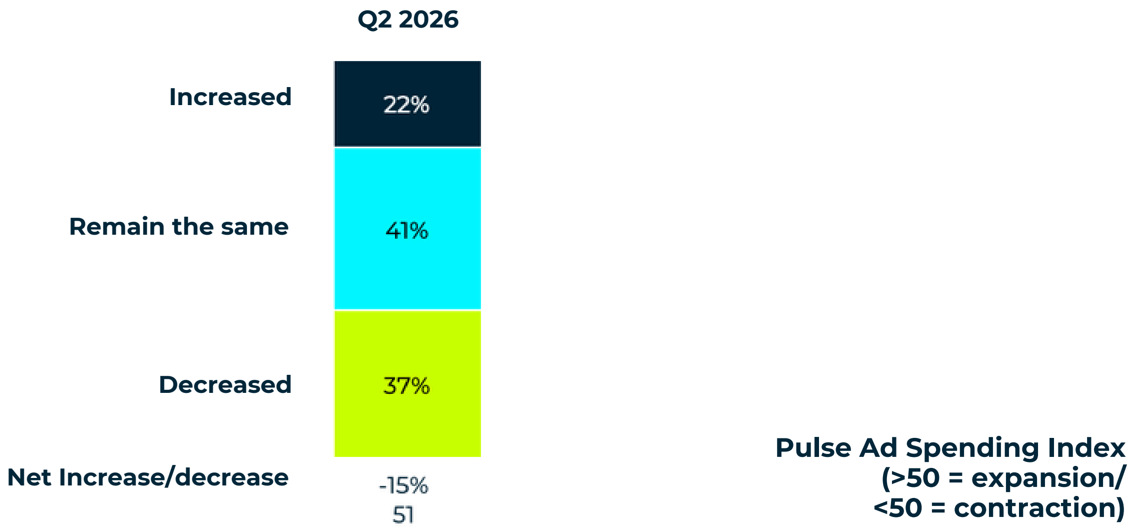
Main Findings

Expectations for client marketing spend is slightly higher than in Q1 (+5%) reflected in a higher sentiment index of 51.

Base: All respondents - 27



Q3. For 2026, do you expect your clients' total spending on marketing (whether with you or other agencies) to increase, decrease or remain the same compared to 2025?

Business Type

	Creative	Media	Full Service
N=	*9*	*5*	*9*
Increased	11%	60%	12%
Remain the same	56%	0	44%
Decreased	33%	40%	44%
Summary			
Net Increase/Decrease	-22%	20%	-33%

Main Findings

Where are clients spending more?

(BASE : Expect clients' total spending on marketing to increase/decrease in 2026)

Clients' spending will increase (n=6)

"They are spending more across the board. Last year there was a lot of uncertainty in the marketplace dictated mainly by geopolitical events. Clients seem to have priced that in and are returning to business as normal.

"Digital has further increased since 2025, which is where the major shift is with our existing customers. We have also acquired a number of new clients with medium to large budgets so this has also increased spend.

"Investing more in corporate comms and reputation management, as well as in digital and content creation with multiple creators.

Q4a. Where are clients spending more than last year
(say, by media category, or non-advertising activities if relevant)?

Where are clients spending less?

Clients' spending will decrease (n=10)

"Traditional media spend is being harder hit, as companies move into accelerated data transformation, moving money to digital or non-traditional formats.

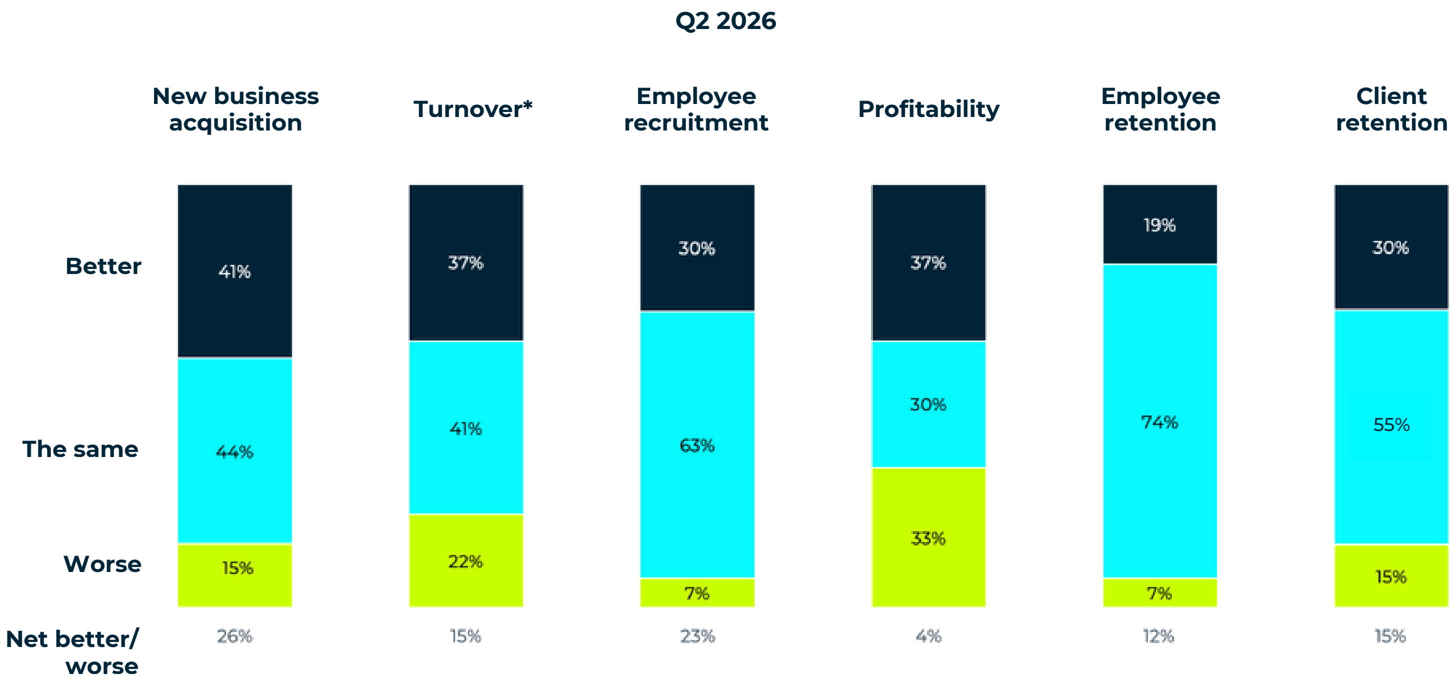
"Bringing more social content creation in house or going to specific agencies for social/digital.

Q4b. Where are clients spending less than last year
(say, by media category, or non-advertising activities if relevant)?

Main Findings

Expectation from business for the rest of 2026 show the strongest net positive sentiment around new business (+26%) although this has declined from (+42%) in Q1 2026. Employee recruitment (+23%), and client retention and turnover (+15%) are consistent when compared to Q1 2026.

Base: All respondents - 27



Q5. Over the rest of the year, do you think each of the following will be better, the same or worse than the year so far?

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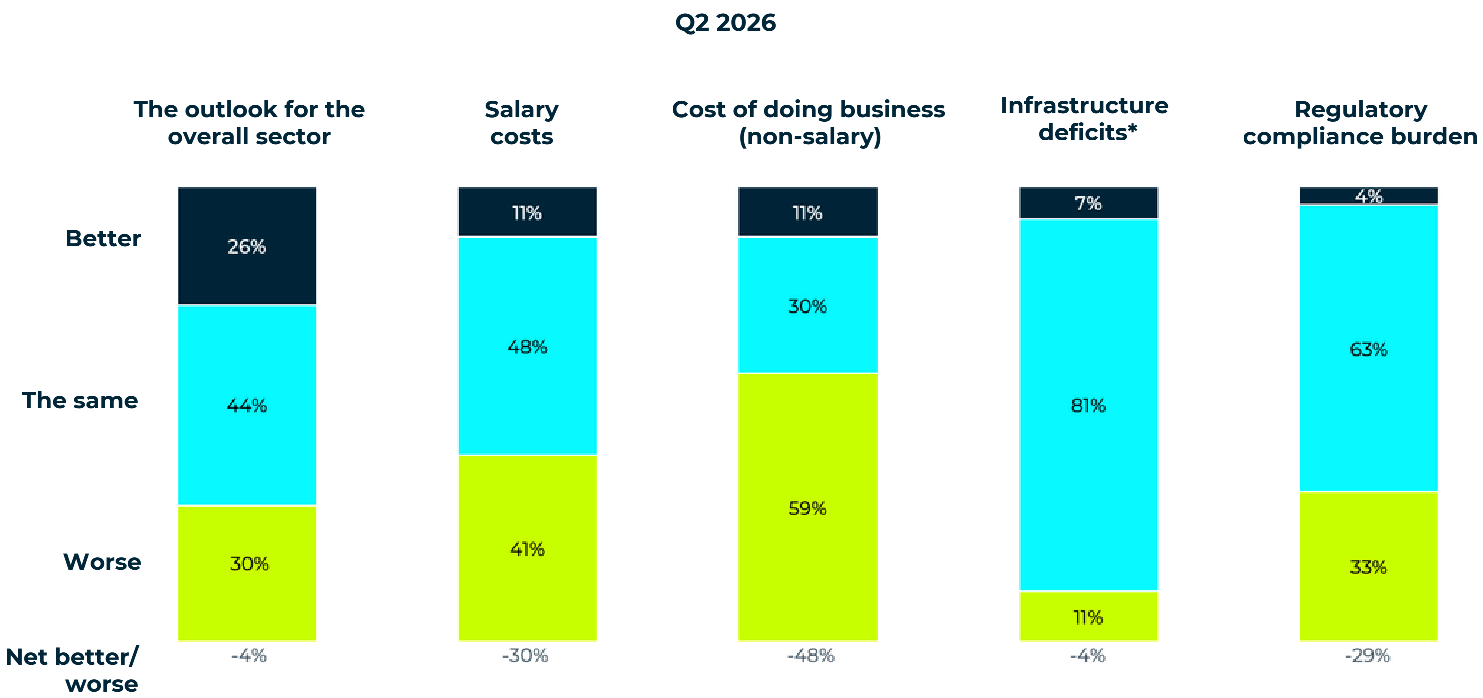
Main Findings

As in previous waves, the most negative sentiment is directed towards the cost of doing business (-48%), salary costs (-30%) and the regulatory compliance burden (-29%). However, sentiment towards the overall sector has improved steadily over time, with net sentiment at -4% compared to -16% in Q1.

Base: All respondents - 27



Q5. Over the rest of the year, do you think each of the following will be better, the same or worse than the year so far?

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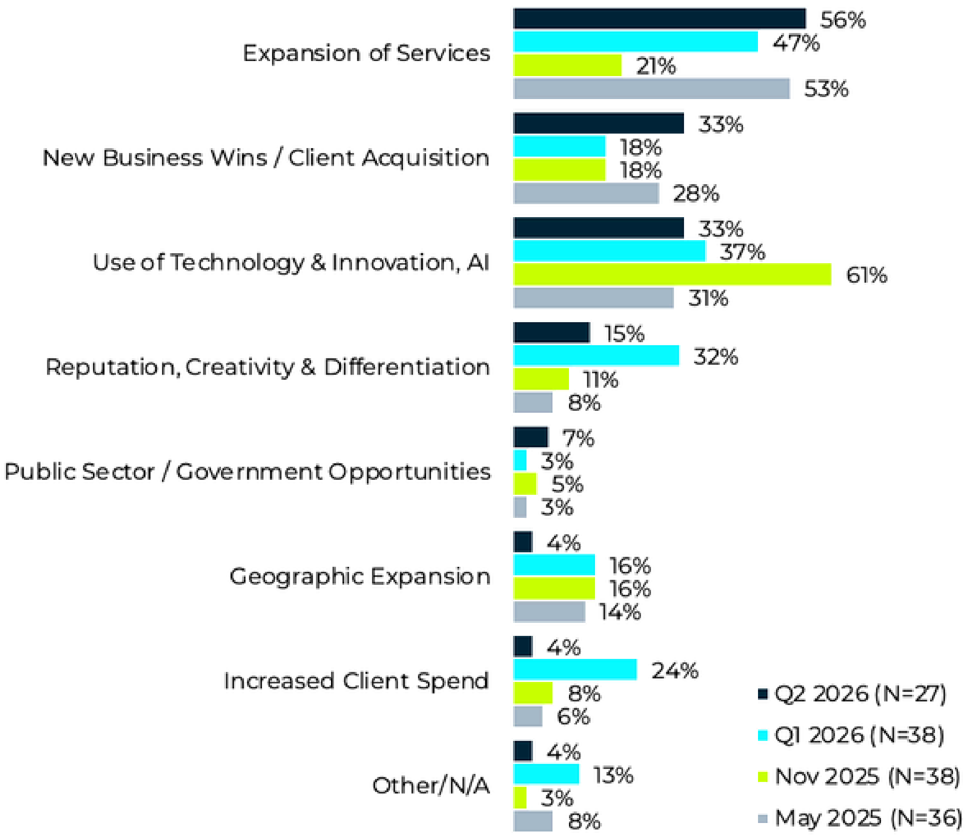
Main Findings

Expansion of Services is still the leading opportunity (56%), followed by New Business Wins/Client Acquisition (33%) and Use of Technology & Innovation (33%).



Q6. What are the top 2-3 opportunities for your agency right now, especially those that make you optimistic about the future of your business?

	Business Type		
	Creative	**Media**	**Full Service**
N=	*9*	*5*	*9*
Expansion of Services	56%	60%	67%
New Business Wins / Client Acquisition	33%	20%	22%
Use of Technology & Innovation, AI	33%	40%	22%
Reputation, Creativity & Differentiation	0	0	33%
Public Sector / Government Opportunities	11%	0	11%
Geographic Expansion	0	0	11%
Increased Client Spend	11%	0	0
Other/NA	0	20%	0

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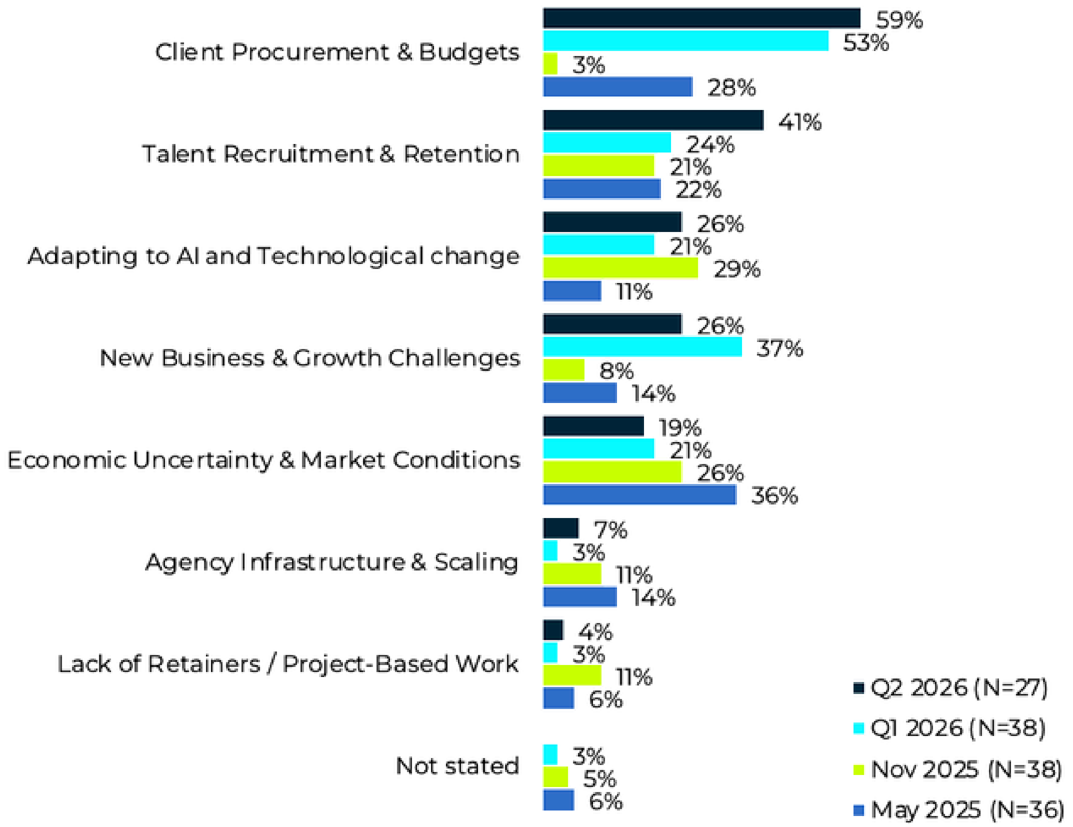
Main Findings

Client procurement and budget pressures remain the biggest challenge facing companies (+6%). Recruitment and retention is the second most significant challenge, increasing (+17%) since Q1.



Q10. In your own words, what is the biggest challenge facing your agency right now?

	Business Type		
	Creative	Media	Full Service
N=	*9*	*5*	*9*
Client Procurement & Budgets	89%	20%	67%
Talent Recruitment & Retention	33%	40%	56%
Adapting to AI & Technological change	33%	20%	33%
New Business & Growth Challenges	11%	60%	11%
Economic Uncertainty & Market Conditions	11%	20%	11%
Agency Infrastructure & Scaling	0	0	11%
Lack of Retainers / Project-Based Work	11%	0	0
NS	-	-	-

Regulatory Impact

Regulatory Impact

Reasons for saying current government policies are having a **positive** impact on business.

Base: Current government policies having a positive impact on business

Positive Impact on Business (n=3)

"There seems to be more advertising opportunities with the public sector recently. And the whole e-tenders process seems to be getting more streamlined.

"Strong economic performance, investment in key infrastructure and also in education.

"Despite the high costs and the cost of labour, the government are endeavouring to support by way of education training and other supports that a lot of SMEs and smaller agencies are not aware of.

Q7b/Q7c.

Regulatory Impact

Reasons for saying current government policies are having a **negative** impact on business.

Base: Current government policies having a negative impact on business

Negative Impact on Business (n=5)

"

The cost of doing business has increased significantly. From the point of view of a small business, those costs are becoming harder to carry. Especially when margins are already wafer thin and the market is uncertain.

"

Government procurement policies are costing agencies money with pitches that do not provide transparency. Advertising regulations are penal for certain categories and the advertising sector continues to suffer disproportionately.

"

Due to our client portfolio, government policies restricting advertising are meaning a switch away from traditional platforms.

"

Government spend needs to come down to 6% so will impact budgets. Given spend is down for agencies, Government bodies could reduce the ask for tendering and not ask for full creative thinking and research.

Q7b/Q7c.

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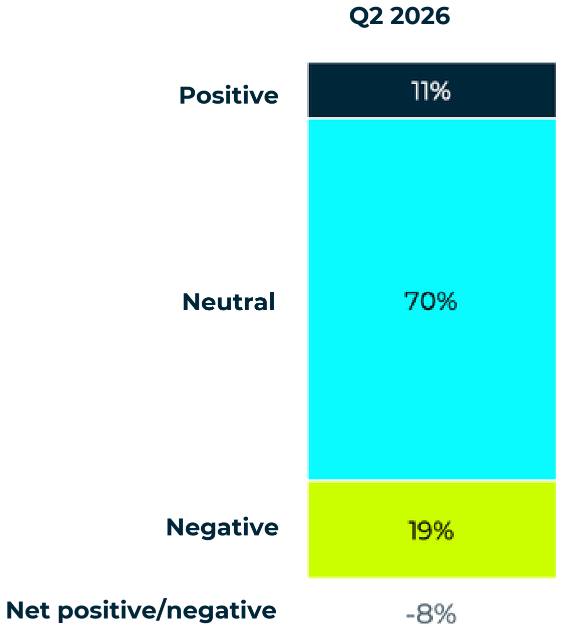
Regulatory Impact

Companies demonstrate that government policies are having less negative impact on their business with the net positive/negative score reducing from -16% in Qtr 1 to -8% this quarter.

Base: All respondents - 27



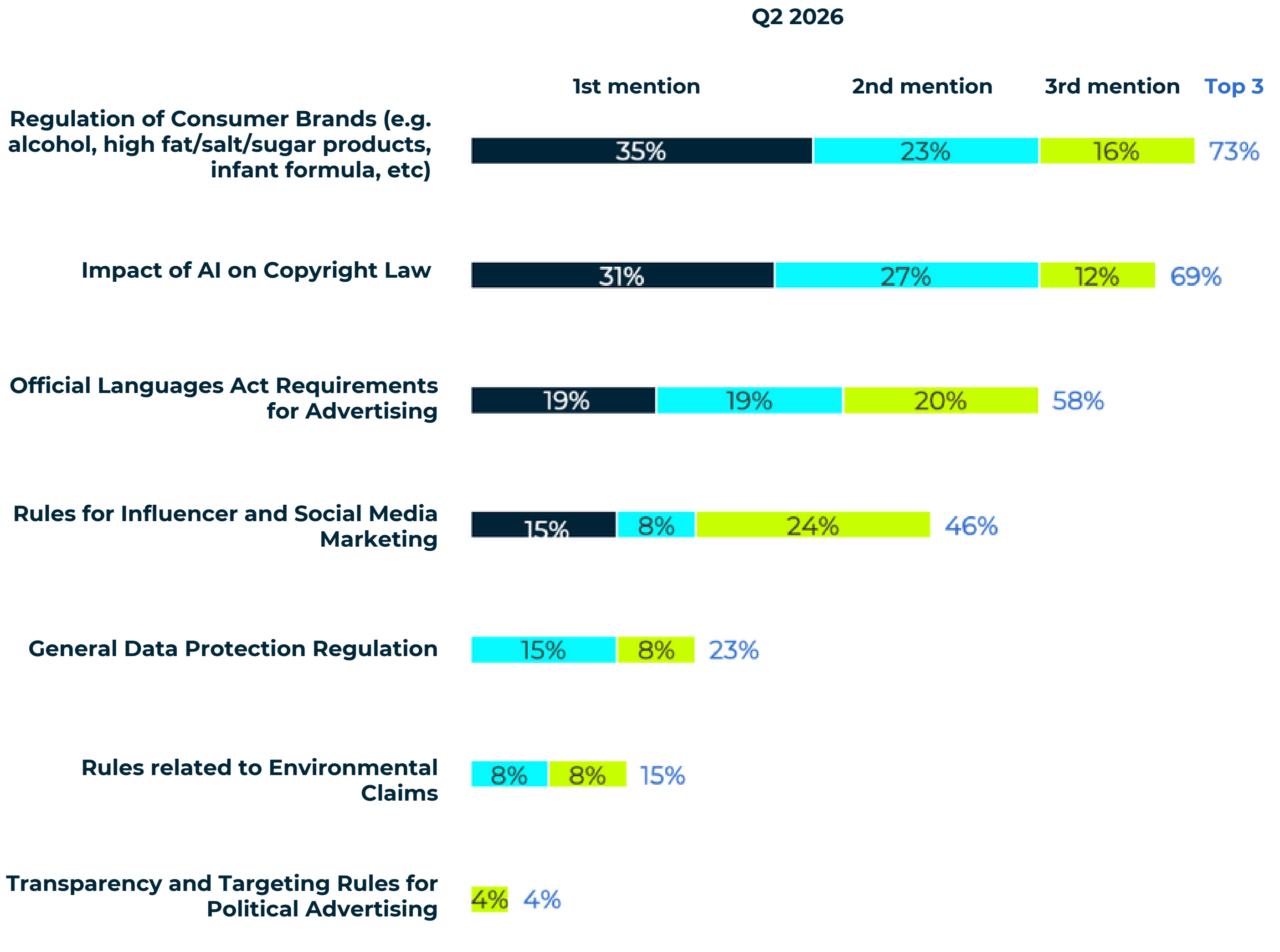
Q7a. On balance, are current government policies having a positive, negative or neutral impact on your business?

	Business Type		
	Creative	**Media**	**Full Service**
N=	*9*	*5*	*9*
Positive	0	20%	22%
Neutral	100%	20%	56%
Negative	0	60%	22%
Summary			
Net positive/negative			

Regulatory Impact

The top advertising related concern is the regulation of consumer brands. Concern about Official Languages Act has increased significantly (+27%) as has concern about the impact of AI on Copyright Law (+20%).

Base: All respondents – 26



Q8. Which advertising-related regulatory issues are of greatest concern to your organisation? Please rank your Top 3

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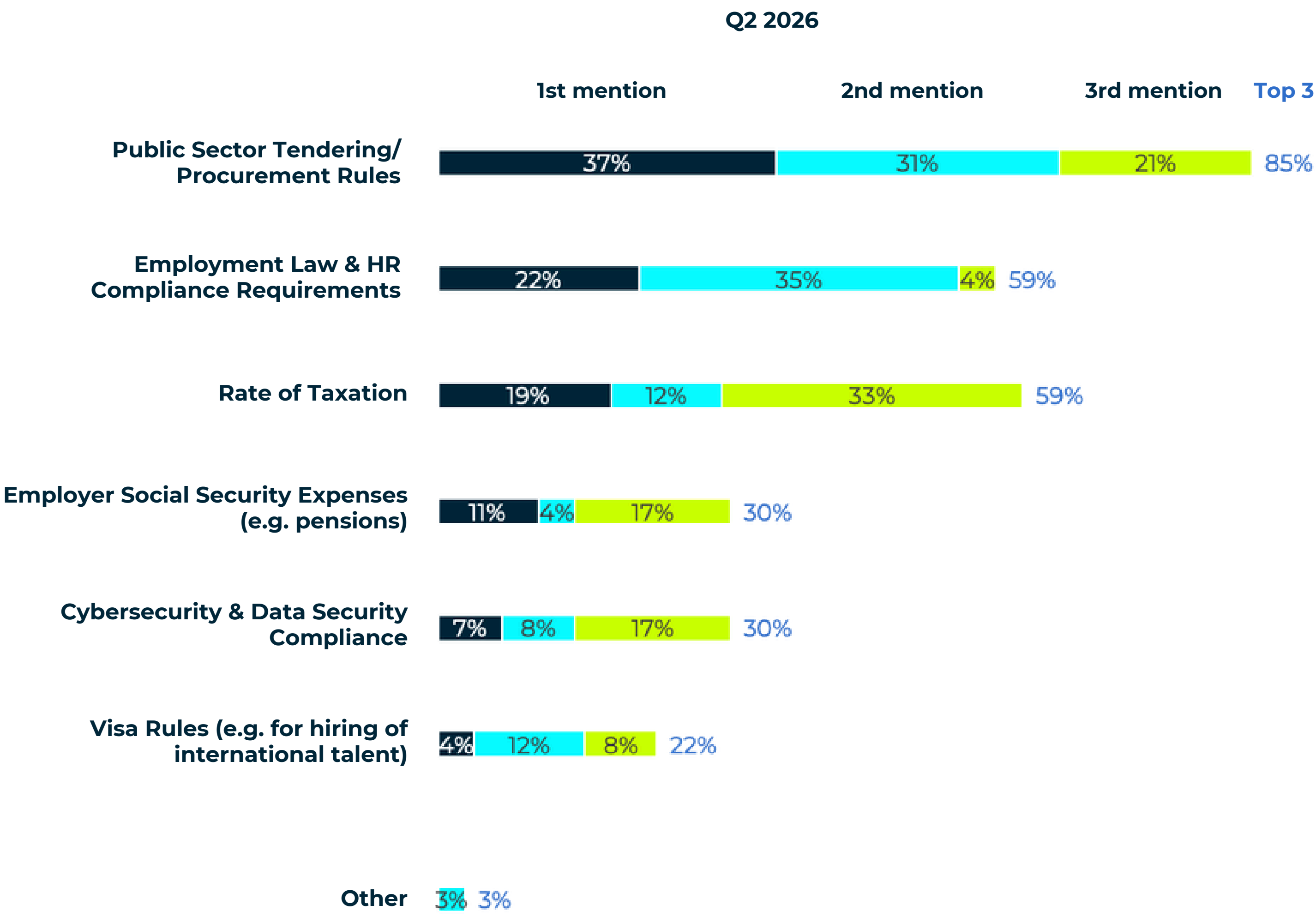
Regulatory Impact

The most widely cited regulatory concern with regard to the cost of doing business is public sector tendering / procurement rules (+13%). The rate of taxation, increased slightly, while concern about employer social security expenses declined (-26%).

Base: All respondents – 27



Q9. When thinking about the cost of doing business, which regulatory issues are of greatest concern to your organisation? Please rank your Top 3

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The Creative & Communications Association

We are the business representative organisation for Ireland’s creative and communications industry.

We represent and support our members with clarity of purpose: to enhance and future proof the creative and communications industry in Ireland.

We give our members a strong voice, better protection, and the intelligence to grow. Through Influence & Lobbying, Market Intelligence, Business Support, Convening & Connecting, and Learning & Development, we empower businesses operating in the creative and communications sector.

Our membership spans Media and Creative, Advertising, Public Relations and Affairs, Sponsorship, Events and Experiential design, Digital and Research and Strategic Consultancy.

www.ccai.ie

(01) 676 5991

6 Mount Street Upper, Dublin 2

keith.oconnor@ccai.ie