Creative & Communications Association

Market Intelligence

Pathfinder Pulse Survey Q3 2026



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Background and Objectives

This quarterly sentiment pulse of Leaders across businesses operating in media, creative, PR, experiential and digital communications is carried out by Amárach on behalf of The Creative & Communications Association.

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

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

Pathfinder Pulse commenced in May 2025 aiming to build a robust dataset and long-term indicators of key business trends and shifts. This latest Quarter 3 survey was conducted in the week following the Government Budget for 2027 and gathers sentiment on it and the regulation of consumer brands.

Methodology



Fieldwork dates

12/10/2026 – 21/10/2026



Sample Definition

CEOs, leaders and founders.



Methodology

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



Sample Size

A total of 32 CEO surveys were completed reporting for October 2026, each representing an individual member company.

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Sample Profile

Base: All respondents

32 member companies responded, 31% Creative, 28% Media, 19% Full Service and 16% PR/Communications businesses.

Agency type	Oct 2026	Jul 2026	Mar 2026	Nov 2025	May 2025
N=	***32***	*27*	*38*	*38*	*36*
Creative	**31%**	33%	28%	29%	36%
Media	**28%**	19%	24%	29%	24%
Full Service	**19%**	33%	24%	26%	–
PR/Communications	**16%**	15%	10%	11%	11%
Event/Experiential	**3%**	–	11%	5%	3%
Digital/Social	**–**	–	–	–	6%
Branding/Design	**3%**	–	–	–	3%
Other (incl. working across multiple areas)	**–**	–	3%	–	17%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Figures may not sum to 100% due to rounding. "–" indicates no respondents in that category (or category not listed in that wave). In May 2025 "Full Service" was not a listed option; agencies working across multiple areas were recorded as "Other".

Q11. Is your agency mainly?

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Trend Analysis

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Trend Analysis

These results have been interpreted in the context of wider developments affecting the creative and communications sector, including Government Budget for 2027, global uncertainty, the rapid mainstreaming of AI workflows and the regulatory agenda.

1 Client demand is stable, and the wider marketing market is more positive

- Expectations for clients' total marketing spending in 2026 have moved into positive territory, with a net score of +3 in Q3. This is an 18-point improvement on Q2 and the first positive reading since Q3 2025.
- Expectations for client spend with member companies for the rest of the year remain positive at (+9), a stronger positive sentiment than in previous quarters.
- Client spending with member agencies so far this year is broadly stable at -9, a modest improvement on the -11 recorded in both Q1 and Q2 2026. Media agencies are reporting net growth (+11).

2 New business and client relationships remain solid

- The outlook for new business acquisition remains firmly positive at +21. New business has been the most consistently positive indicator in the survey, recording a positive score in every wave (ranging from +21 to +42).
- The outlook for client retention for the rest of the year is positive at +9, the fifth consecutive positive reading.

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Trend Analysis

3 Outlook for business performance is strong across recruitment and retention

- Sentiment around employee retention has reached its highest level since the survey began (+32).
- The outlook for employee recruitment remains consistently positive at +22, within the +16 to +24 range seen over the past eighteen months.
- Infrastructure deficits are now seen as neutral (net 0), an improvement from -16 in Q1 2026 and -4 in Q2 2026.

4 Cost and regulatory pressures have intensified

- The cost of doing business (non-salary) remains the most negative measure at -66, followed by salary costs (-44) and the regulatory compliance burden (-38). Each has deteriorated since Q2 2026.
- These pressures are feeding through to expectations for profitability (-12, from +4 in Q2) and turnover (-16, from +15) for the final quarter of the year.
- In the immediate aftermath of Budget 2027, the net score on the impact of government policies has moved to -31 (from -8 in Q2), and over half of members (53%) disagree that the Budget package will help address the rising cost of doing business. This highlights the need for greater sector engagement with Government.

5 Confidence in the sector is at its highest level since Q2 2025

- Sentiment about the outlook for the sector as a whole has improved in every survey, rising from -28 in Q1 2025 to -3 in Q3 2026 – the highest score recorded. The proportion expecting the sector outlook to worsen has more than halved, from 47% in Q1 2025 to 22% today.
- The overall arc of eighteen months of results is of an industry that has absorbed geopolitical shocks, cost pressures and rapid technological change while growing steadily more confident in itself.

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Trend Analysis

Net Scores

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

Measure	Oct '26	Jul '26	Mar '26	Nov '25	May '25
Client spending with agency, year to date (Q1)	**-9**	-11	-11	-3	0
Expected spending with agency, rest of year (Q2)	**9**	30	11	37	23
Clients' total marketing spending, this year (Q3)	**3**	-15	-11	19	-12
Turnover (Q5)	**-16**	15	23	n/a	n/a
New business acquisition (Q5)	**21**	26	42	39	33
Client retention (Q5)	**9**	15	18	13	8
Employee recruitment (Q5)	**22**	23	24	21	16
Employee retention (Q5)	**32**	12	13	6	0
Infrastructure deficits (Q5)	**0**	-4	-16	n/a	n/a
Salary costs (Q5)	**-44**	-30	-21	-34	-47
Cost of doing business, non salary (Q5)	**-66**	-48	-58	-58	-61
Regulatory compliance burden (Q5)	**-38**	-29	-37	-37	-50
Profitability (Q5)	**-12**	4	-2	26	17
Outlook for the overall sector (Q5)	**-3**	-4	-16	-16	-28
Impact of government policies (Q7a)	**-31**	-8	-16	-29	n/a

Turnover and infrastructure deficits were first asked in March 2026. Government policy impact was first asked in November 2025.

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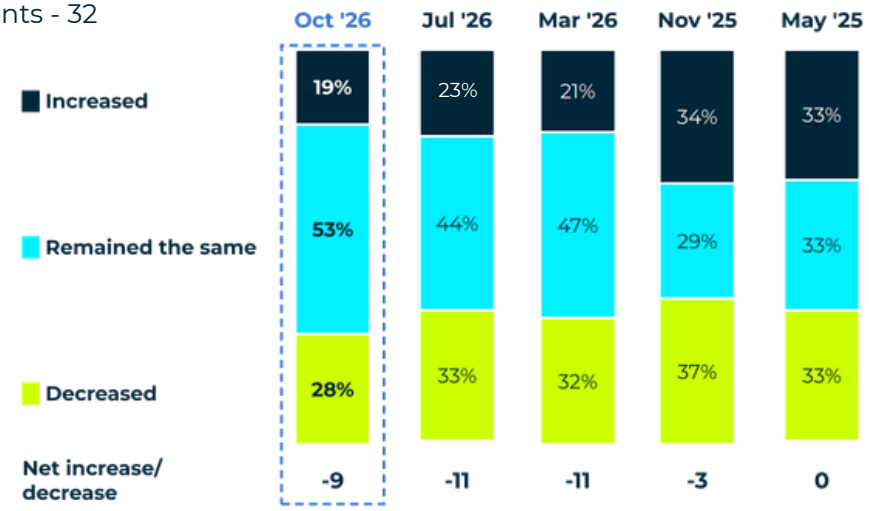
Main Findings (Q3 2026)

Main Findings: Agency Revenues

Client spending so far this year is stable (net -9%), a slight improvement on Q2 (-11%). Over half of members (53%) report spending at the same level as last year, and Media services are reporting net growth.

Base: All respondents - 32



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?

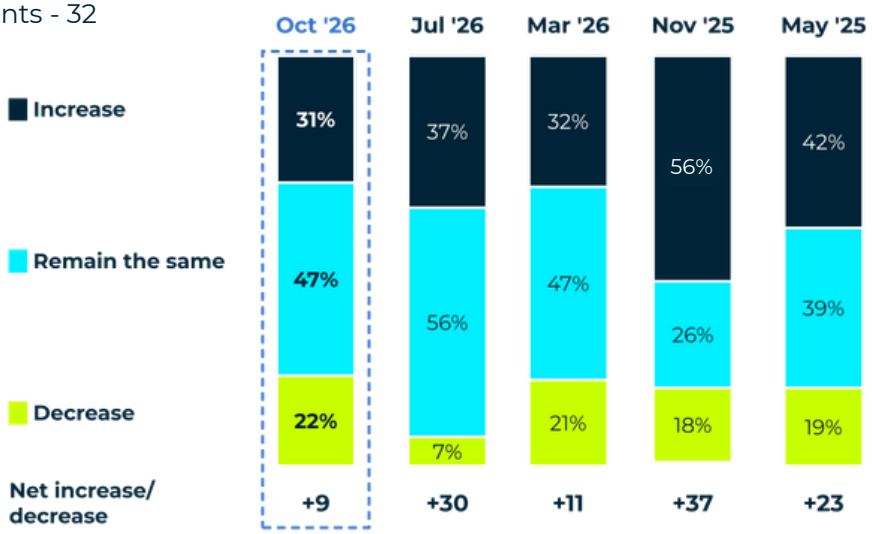
Media services continue to show positive growth (+11%) and companies providing Full Service are in balance (0%). Creative services report the most pressure year to date, although six in ten say spending has held steady.

	Business Type		
	Creative	**Media**	**Full Service**
N=	*10*	*9*	*6*
Increased	0	33%	33%
Remain the same	60%	44%	33%
Decreased	40%	22%	33%
Summary			
Net Increase/Decrease	**-40%**	**11%**	**0**

Main Findings: Client Spending

Members remain net positive about client spending for the rest of the year (+9%), the fifth consecutive positive reading. Almost one in three (31%) expect spending with their business to increase.

Base: All respondents - 32



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?

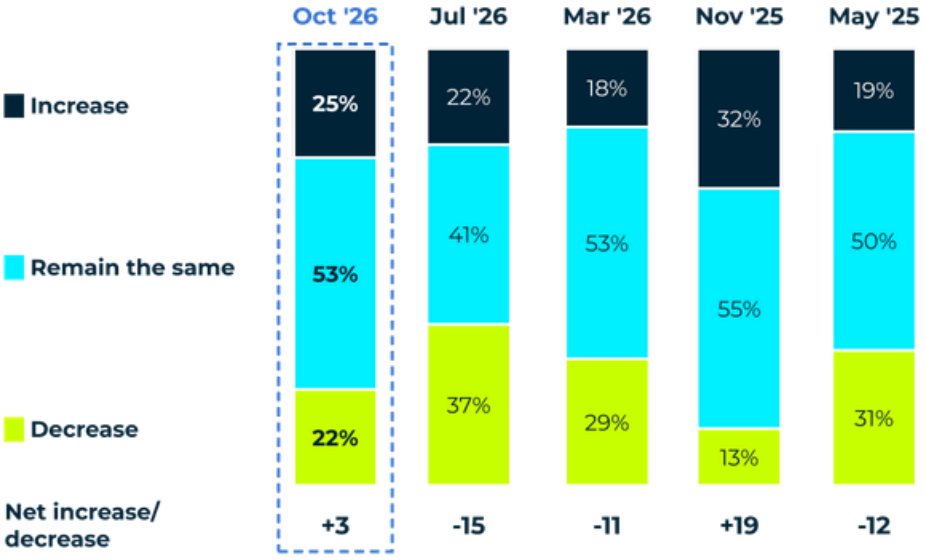
Full Service companies are the most optimistic for the rest of the year (+16%), followed by Media (+11%). Four in ten Creative companies (40%) expect spending to increase.

	Business Type		
	Creative	**Media**	**Full Service**
N=	*10*	*9*	*6*
Increased	40%	33%	33%
Remain the same	20%	44%	50%
Decreased	40%	22%	17%
Summary			
Net Increase/Decrease	**0**	**11%**	**16%**

Main Findings: Marketing Budgets

Expectations for clients' total marketing spend in 2026 have turned positive (+3%), an 18-point improvement on Q2 (-15%). One in four members (25%) expect clients' overall marketing budgets to grow.

Base: All respondents - 32



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?

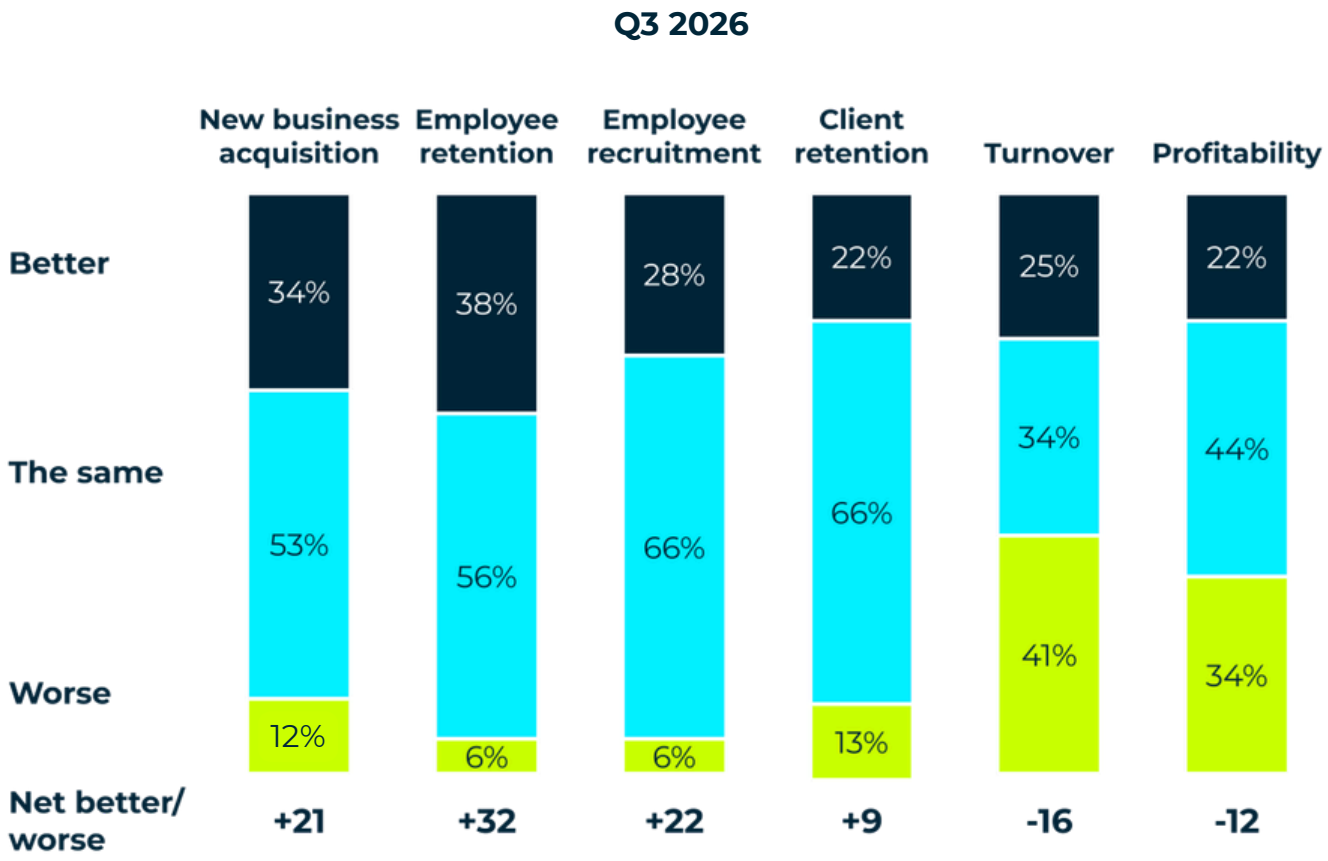
Full Service (+16%) and Media agencies (+11%) are net positive about clients' total marketing spend, while seven in ten Creative agencies (70%) expect it to hold steady.

	Business Type		
	Creative	**Media**	**Full Service**
N=	*10*	*9*	*6*
Increased	10%	34%	33%
Remain the same	70%	44%	50%
Decreased	20%	22%	17%
Summary			
Net Increase/Decrease	**-10%**	**11%**	**16%**

Main Findings: Business Performance

Employee retention is the standout positive for the rest of 2026 (+32%), with employee recruitment (+22%) and new business acquisition (+21%) also strongly positive. Turnover (-16%) and profitability (-12%) are softer for the final quarter.

Base: All respondents - 32

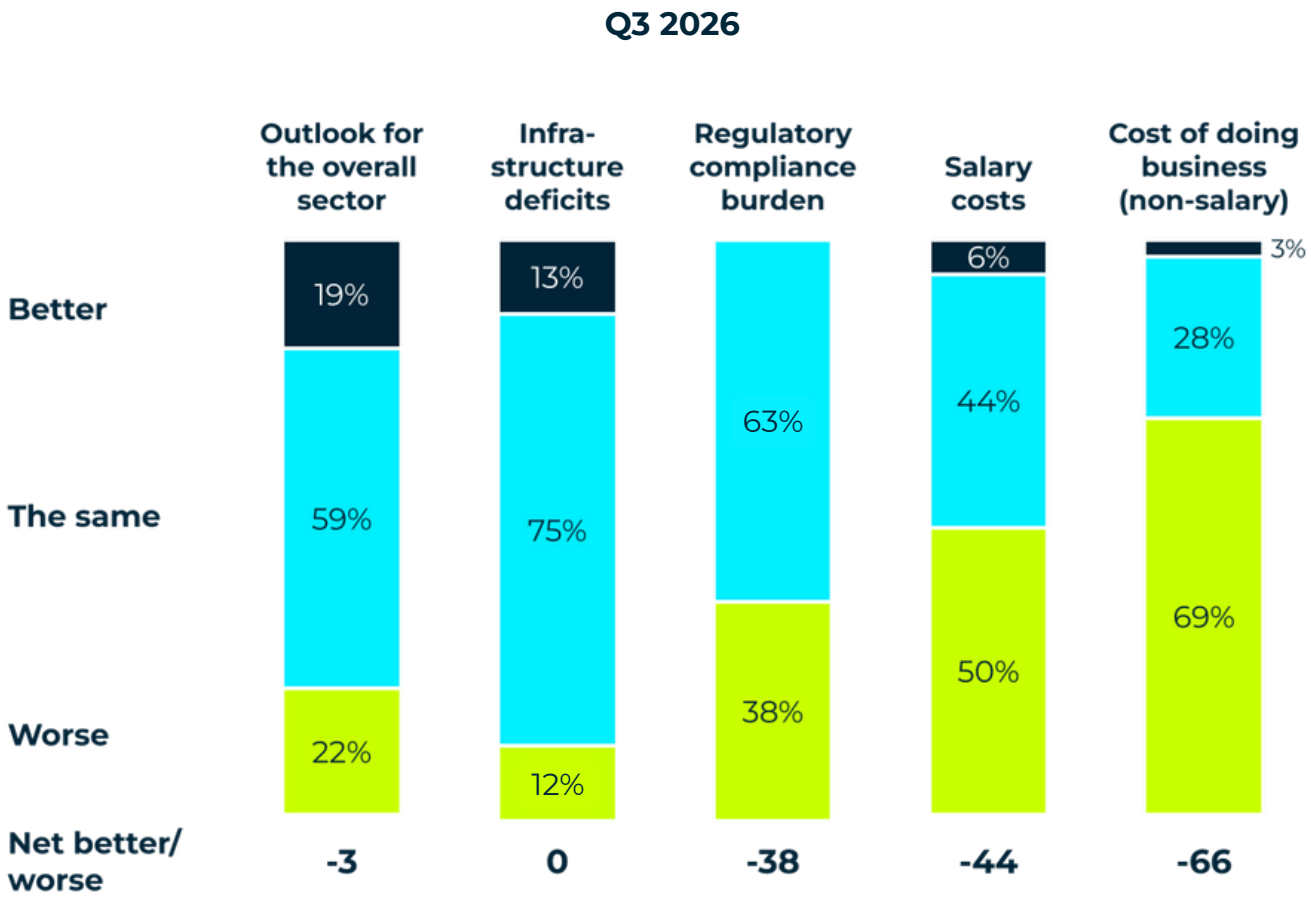


Q5. Over the rest of the year, do you think each of the following will be better, the same or worse than the year so far?

Main Findings: Sector Outlook

Q3 2026 reports sentiment towards the overall sector is the most positive to date (3%, from -28% in May 2025), and infrastructure deficits are now neutral (0%). As in previous waves, cost is the key pressure point: non-salary costs (-66%), salary costs (-44%) and the regulatory compliance burden (-38%).

Base: All respondents - 32



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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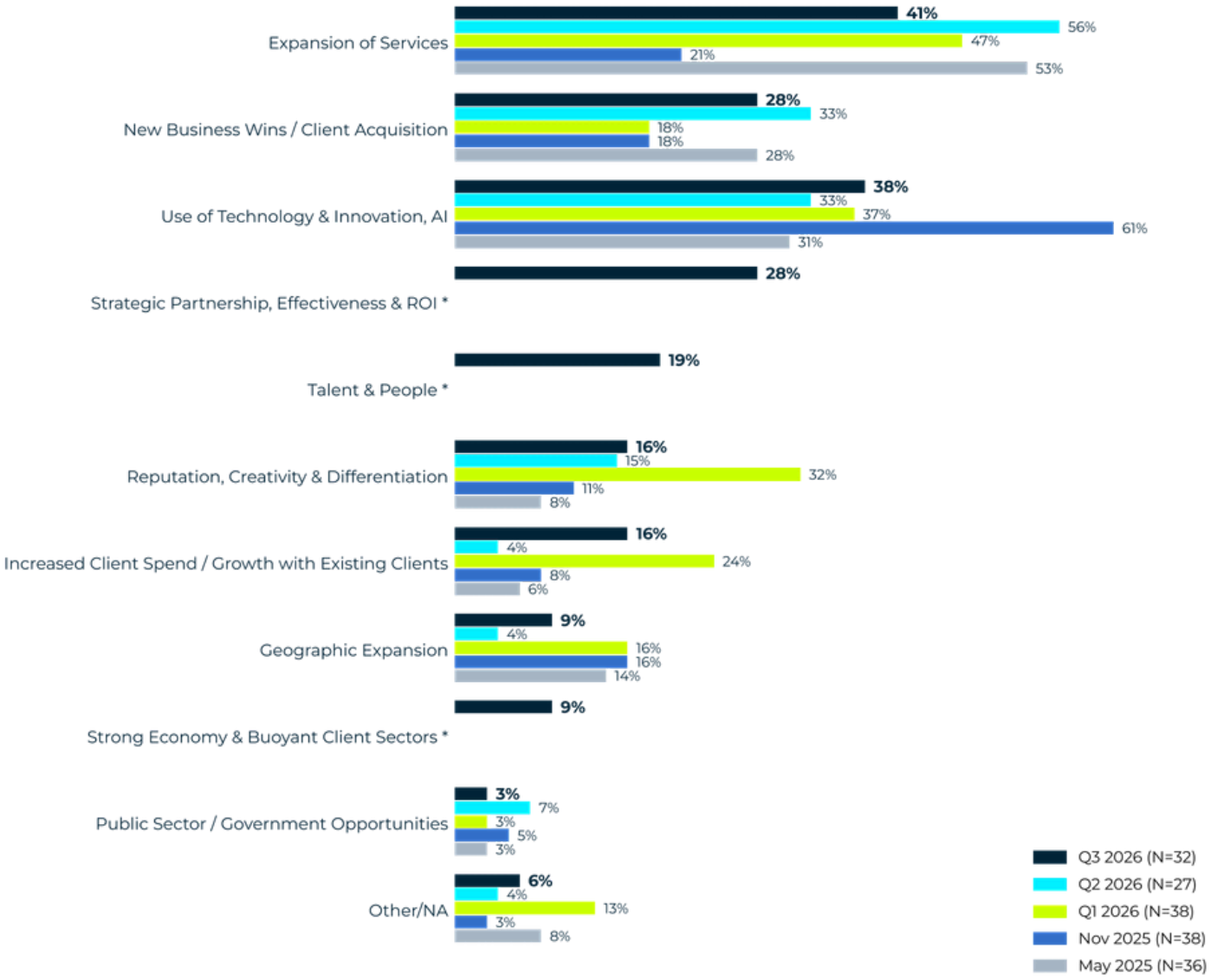
Main Findings: Opportunities

Expansion of Services remains the leading opportunity (41%), followed by Use of Technology & Innovation, AI (38%). New this quarter, a strong theme of strategic partnership, effectiveness and ROI emerges (28%), alongside confidence in own talent (19%).

Base: All respondents - 32



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?

*Open-ended responses coded into themes; respondents could mention more than one theme, so totals exceed 100%. * New theme identified in Q3 2026 – no trend data available.*

Main Findings: Opportunities

Media services are most likely to see opportunity in strategic partnership and proving effectiveness (67%), while Creative services lead on expansion of services (50%).

	Business Type		
	Creative	**Media**	**Full Service**
N=	*9*	*5*	*9*
Expansion of Services	50%	22%	33%
New Business Wins / Client Acquisition	30%	33%	33%
Use of Technology & Innovation, AI	40%	44%	17%
Strategic Partnership, Effectiveness & ROI	20%	67%	17%
Talent & People	20%	33%	0
Reputation, Creativity & Differentiation	30%	11%	0
Increased Client Spend / Growth with Existing Clients	20%	11%	17%
Geographic Expansion	0	0	17%
Strong Economy & Buoyant Client Sectors	0	22%	0
Public Sector / Government Opportunities	10%	0	0
Other/NA	0	0	17%

Main Findings: Opportunities

Where do members see opportunity?

> CMOs are facing increasing pressure to demonstrate the effectiveness of their spending, creating an opportunity for agencies that can provide clear evidence of outcomes... Clients are now seeking partners who can help minimise this waste.

> Some nice new business gains that converted in Q3 ... Retention of these new clients will establish a good platform for 2027.

> The growing importance of culture and real-world brand experiences given the rise of AI slop and a craving for "real".

> We've a clear strategy, good culture and great people. That's a recipe for maximising opportunity.

> AI GEO – media relations and digital PR plays an important role in this shift from Google search to AI search.

> Proven effectiveness of advertising and media helps to validate spend. Strong Irish market, still largely independent of UK and rest of Europe is encouraging.

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?

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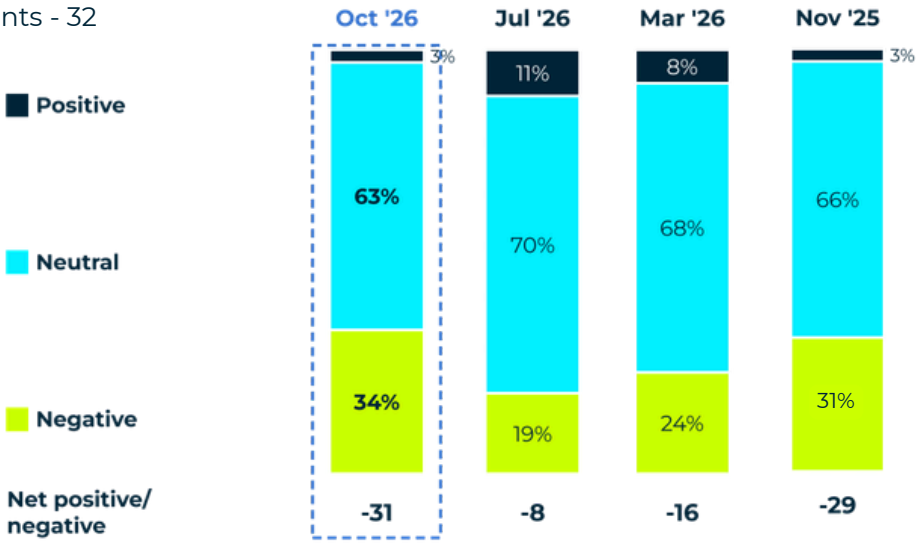
Regulatory Impact

Regulatory Impact

Fieldwork took place in the week after Budget 2027, and the net score on the impact of government policies has moved to -31% (from -8% in Q2). Nonetheless, over one third describe current policies as negative for their business.

Base: All respondents - 32



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

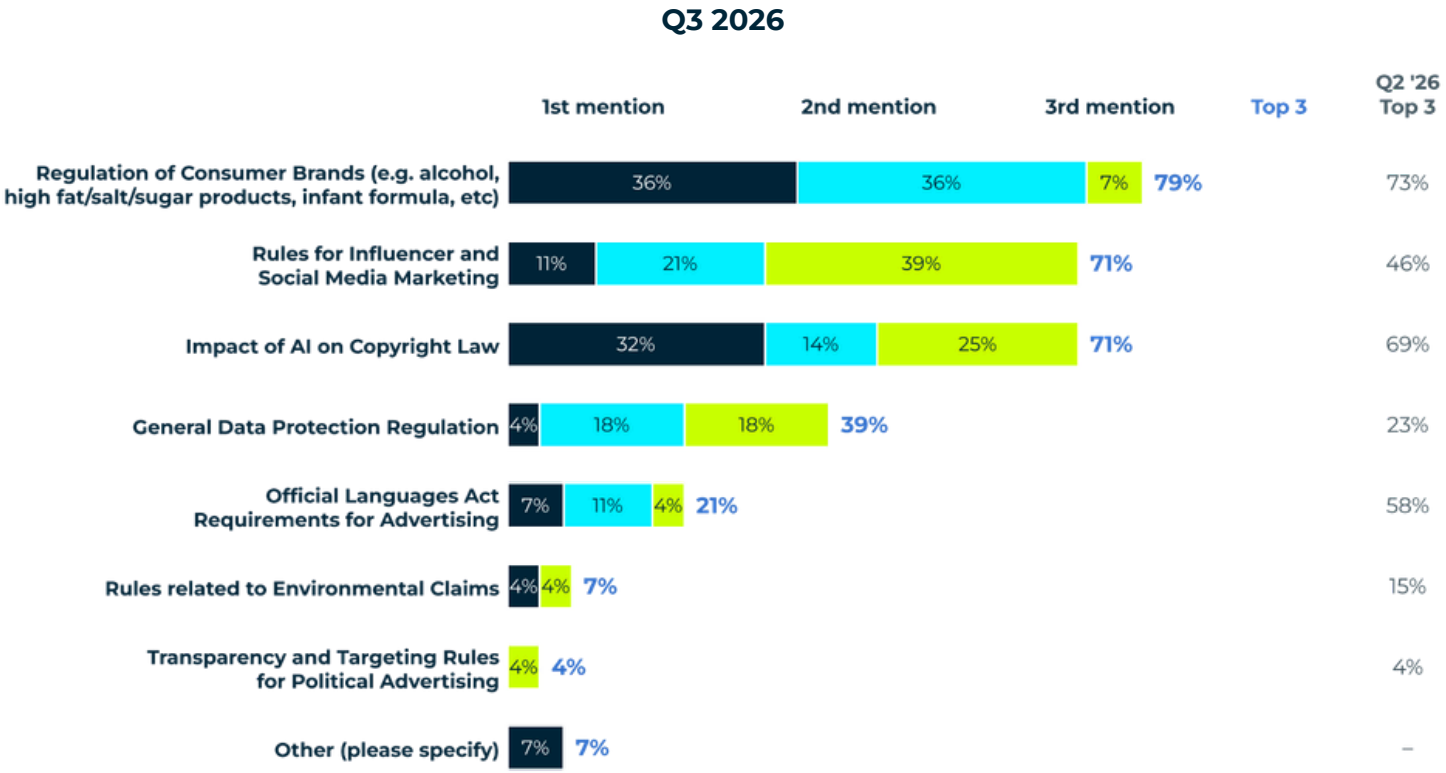
Media and Full Service companies face a different set of regulatory challenges to Creative companies. Media and Full services are net neutral on the impact of government policy (0%), while Creative companies are the most critical.

	Business Type		
	Creative	**Media**	**Full Service**
N=	*10*	*9*	*6*
Positive	0	11%	0
Neutral	30%	78%	100%
Negative	70%	11%	0
Summary			
Net positive/negative	**-70%**	**0**	**0**

Regulatory Impact

Regulation of Consumer Brands remains the top advertising-related concern (79%). Concern about rules for influencer and social media marketing has risen sharply (71%, up from 46%), while concern about Official Languages Act requirements has eased significantly (21%, down from 58%).

Base: Gave an answer – 28



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

"Other" concerns mentioned: AI being used by clients and other agencies to replace work traditionally done by humans in agencies; work visa requirements for new starters from outside the EU. 4 respondents did not rank any issue. Q9 (cost-of-doing-business regulatory issues) was not asked in Q3 2026.

Impact of AI on Copyright Law is the leading concern among Creative companies (78% top 3), while every Full Service agency ranks rules for influencer and social media marketing in its top three.

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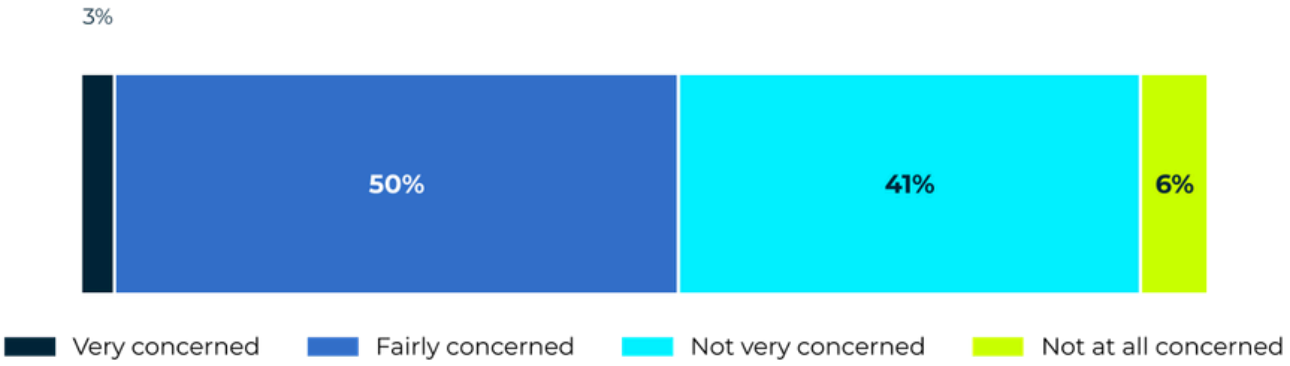
Regulatory Impact - Consumer Brands

Consumer Brand Regulations

Just over half of members (53%) are concerned about the Regulation of Consumer Brands, mostly "fairly concerned" (50%). Media companies show the highest level of concern (67%). Fundamentally, the more complex the regulatory environment becomes, the less willing will advertisers be to make what may be perceived as 'risky' investments in advertising and media.

Base: All respondents - 32



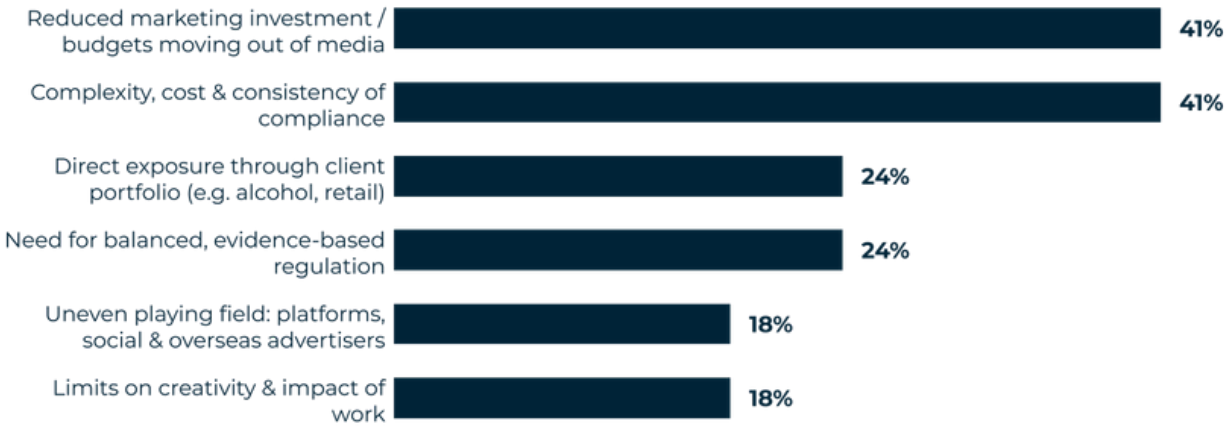
Q8a. Thinking about the Regulation of Consumer Brands, how concerned is your organisation about this issue?

	Business Type		
	Creative	**Media**	**Full Service**
N=	*10*	*9*	*6*
Very concerned	10%	0	0
Fairly concerned	40%	67%	50%
Not very concerned	40%	33%	50%
Not at all concerned	10%	0	0
Summary			
Very/fairly concerned	**50%**	**67%**	**50%**

Consumer Brand Regulations

Among those concerned, the main worries are that regulation will reduce marketing investment or move budgets away from (Irish) media (41%), and the complexity, cost and consistency of compliance (41%). Members consistently stress their support for balanced regulation that protects consumers.

Base: Very or fairly concerned about the Regulation of Consumer Brands – 17



Q8b. What is your main concern regarding the Regulation of Consumer Brands?

Open-ended responses coded into themes; respondents could mention more than one theme. Small base – interpret with caution.

Main concerns about the Regulation of Consumer Brands

> I'm not against regulation. Responsible advertising standards protect consumers and protect trust in our industry. What I'd want is regulation that applies equally to platforms and overseas advertisers, gets reviewed against real outcomes, and is designed with the industry instead of around it.

> Regulation should protect consumers without unnecessarily restricting responsible brand activity or the investment that supports Ireland's creative and cultural economy.

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Consumer Brand Regulations

Members share their views in their own words.

> The restrictions that have been put in place across certain categories have seen spend fall as a result. The shift to digital spend is not helpful to the local market given the dominance of large global platforms.

> Regulation / new rules around consumer brands limit the available media space that they can communicate through – this has the potential to decrease their overall marketing investment and has ripple effects on the trading landscape.

> Brands need to understand what they need to communicate, where they can advertise and how they can substantiate their claims.

> The consistency of the implementation of the regulation isn't there. Where we abide by the rules others don't, particularly in social.

Q8b. What is your main concern regarding the Regulation of Consumer Brands?

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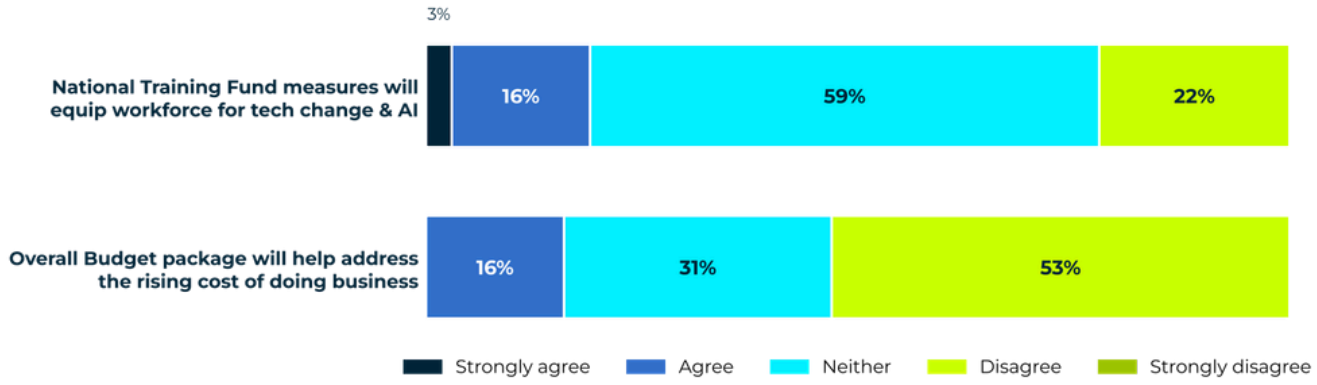
Impact of Budget 2027

Impact of Budget 2027

Members are reserving judgement on Budget 2027's skills measures: 59% neither agree nor disagree that the National Training Fund action will equip their workforce for technological change and AI. Over half (53%) disagree that the overall Budget package will help address the rising cost of doing business.

Base: All respondents - 32



Q12. To what extent do you agree or disagree with the following statements about the Budget?

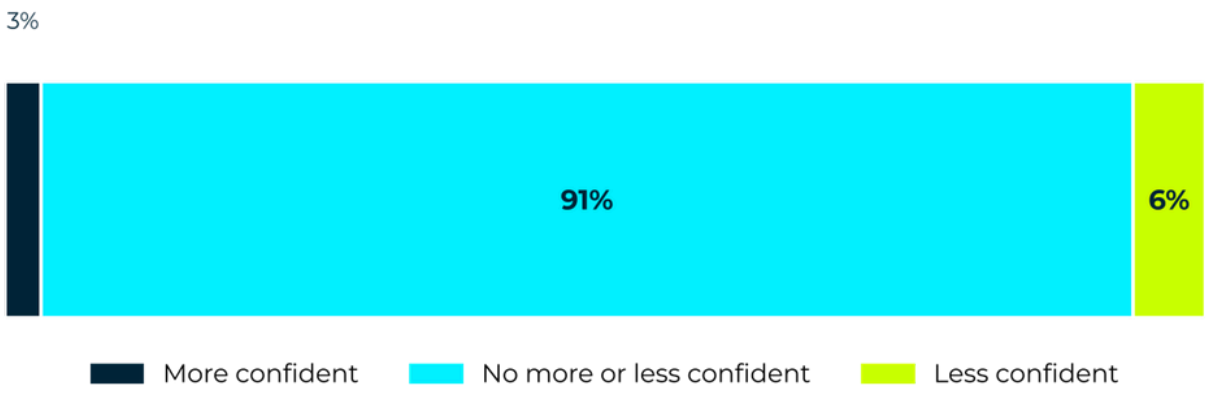
	Business Type		
	Creative	**Media**	**Full Service**
N=	*10*	*9*	*6*
National Training Fund – agree	20%	22%	0
National Training Fund – disagree	10%	33%	17%
Cost of doing business – agree	10%	22%	17%
Cost of doing business – disagree	80%	44%	33%
Summary			
Net agree – National Training Fund	**10%**	**-11%**	**-17%**
Net agree – Cost of doing business	**-70%**	**-22%**	**-16%**

No respondent selected "strongly disagree" for either statement.

Investment Decisions

Investment plans for 2027 are on a steady footing: nine in ten members (91%) say the Budget has left them no more or less confident about their investment decisions, with very few (6%) less confident.

Base: All respondents - 32



Q13. How confident do you feel about investment decisions for 2027 as a result of this Budget?

	Business Type		
	Creative	**Media**	**Full Service**
N=	*10*	*9*	*6*
More confident	0	11%	0
No more or less confident	90%	78%	100%
Less confident	10%	11%	0
Summary			
Net more/less confident	**-10%**	**0**	**0**

No respondent selected "strongly disagree" for either statement.

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Implications for the Sector

Implications for the Sector

The October 2026 Pulse paints a picture of a resilient, confident sector: client demand is holding up, the wider marketing market has turned positive, agencies are retaining their people and confidence in the sector's outlook is higher than at any point since the survey began. Cost pressures are a key concern, but they are well understood and provide a clear focus for collective action.

1 Enter 2027 planning from a position of strength

With clients' total marketing spend now expected to grow and new business sentiment positive in every wave, companies are well placed for the 2027 planning and pitching season. Converting a healthy pipeline – and retaining the new clients won this year – is the immediate opportunity.

2 Make talent the competitive edge

Record employee retention and steady recruitment sentiment show that companies' investment in their people is paying off. The €150 million for workforce and AI skills from the National Training Fund is an opportunity to build on this; many members are reserving judgement, so clear guidance on how agencies can access it would be valuable.

3 Lead the conversation on effectiveness

Members increasingly see their future in strategic partnership (especially media companies) and proving the return on marketing investment. As CMOs face pressure to demonstrate effectiveness, the sector can position itself as the partner that turns marketing spend into measurable growth – a powerful counter-argument to budget cuts.

4 Use AI as an accelerator of creativity

Technology and AI remain a top-two opportunity, now framed as practical enablers – from AI-search (GEO) and production efficiencies to proprietary tools that help smaller companies compete. Agencies that pair AI with human creativity and "real-world" experiences are best placed to stand out.

5 A clear, constructive advocacy agenda

Members are not against regulation; they want it to be proportionate, evidence-based, consistently enforced and applied equally to global platforms and overseas advertisers (rather than, say, disadvantaging domestic, Irish media). Together with the cost of doing business, this gives the Association a well-evidenced agenda for engagement with Government. The marked easing of concern about the Official Languages Act shows how quickly sentiment can improve when issues are addressed.

6 Quiet confidence for the year ahead

Sentiment about the sector's outlook has improved in every survey since May 2025. With nine in ten members holding steady on their 2027 investment plans, the sector enters the new year with stability, momentum and a growing belief in its own value.

Creative & Communications Association

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.

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