Advertising and Communications Industry

Census 2025

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About Iapi

Iapi is the business representative organisation for the advertising and communications industry in Ireland. Representing over 80% of the industry's workforce, our members are indigenous and multinational agencies of all sizes providing professional services to private and public sector clients. Iapi members connect clients with their audiences, they understand behaviour and know how to influence it.

Iapi represents its members to business, policy makers, and government, while also supporting our members to navigate challenges and seize opportunities. We provide trusted insights through market leading events, training and awards as well as publishing industry forecasts and trends to guide our members decision-making.

Foreword

I am delighted to present this year's Iapi Census which provides comprehensive insights to guide business decisions across the advertising and communications industry and highlights key trends to stakeholders. The Census presents an industry that's expanding, exporting, and evolving. Having gathered the view of our members in early Autumn, a clear picture of the industry in Ireland has emerged. This is an industry winning more business, partnering more deeply with clients, and helping home-grown brands scale both nationally and internationally. Our challenge now is to ensure that this growth is sustainable and built on strong commercial discipline, talent investment, and long-term strategic focus.

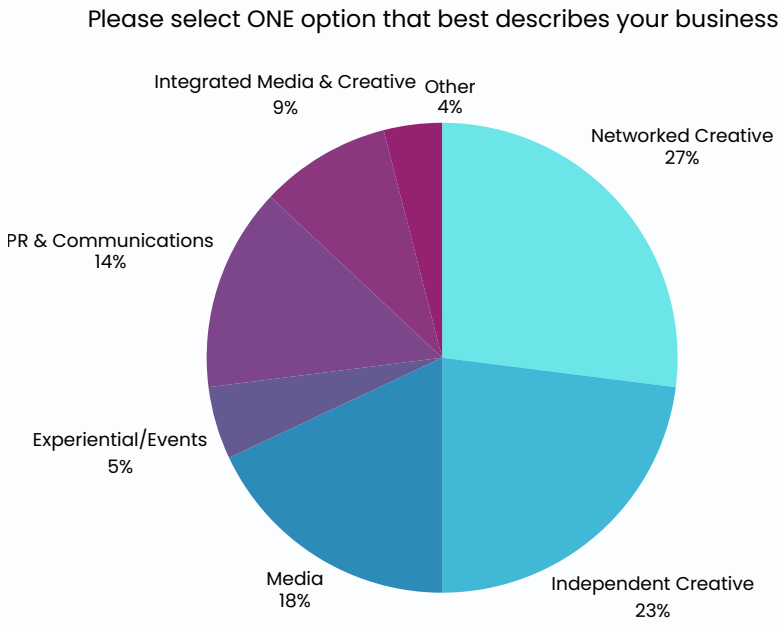
The 2025 Census report focuses on Workplace and Commercial trends reflecting a change in approach to previous years. The publication of a new quarterly Iapi CEO sentiment pulse (with Amarach) addresses some of areas captured previously by the Census. Our Census response rate of one third of our membership reflects average survey rates with participation from all large agencies representing 65% of the workforce but with lower response rates from smaller independent agencies. Finally, this year's Census includes an in-depth salary survey assessing rates of pay across key functions in the industry and this confidential report has been shared directly with participants.

Executive Summary

Executive Summary: Introduction

This years Census was carried out in July and August 2025 across the membership base of Iapi. Representing 65% of the total workforce, 33% of members (or 22 individual agencies) responded to the Census. This includes all of the large member agencies. The response rate from smaller independent agencies was lower than in previous years.

Findings in this report are derived from the responses of those agencies who participated and as such commentary is directional and discusses trends in general based on those replies.



Executive Summary

This year's census adopted an updated approach to previous years. In 2024, there were three separate surveys each focusing on a different aspect of our industry. These were structured as a Commercial Survey, a Talent Survey and a Leadership Sentiment Survey. In 2025, we streamlined this into a single, more concise and focused survey. The comparison in response rates to the 3 surveys last year relative to this year by agency type are outlined in the table below, showing different response rates to this year's census in comparison to the previous year.

Where we have made comparisons in this report to figures from the 2024 census, it is again important to note that these comparisons are intended to comment on general trends and are subject to limitations related to differing sample sizes and agency type makeup.

In 2024, we heard from 50 member agencies in at least one element of the census. This year, 22 agencies responded, representing 65% of the overall workforce.

It is worth noting that the views of digital and social agencies are not represented and other agency types, namely events and experiential agencies, have limited representation.

	2024			2025
	Commercial (N= 29)	Talent (N= 23)	Leader Sentiment (N= 40)	Census (N= 22)
Media	5	3	13	4
Networked creative	6	5	7	6
Independent creative	7	6	7	5
Experiential / Events	2	2	2	1
PR & Comms	3	1	4	3
Digital/ Social	2	1	3	0
Integrated Media & Creative	3	3	2	2
Other	1	2	2	1

Executive Summary: Commercial Performance

The IAPI member agencies who responded to this year's census reported strong financial performance in 2024, with revenues reportedly growing on average by 24% year-on-year. Media billings also reportedly grew by 3% year-on-year. This indicates generally positive trends, although must be considered alongside the sampling limitations previously mentioned.

Across respondents, the average revenue (or fee income) reported in 2024 was €7.2m. Integrated Media and Creative agencies reported the largest profits in the industry in response to our survey.

All agency types except Independent Creative agencies reported year-on-year revenue growth according to the figures provided by responding agencies.

The first six months of 2025 are reported as promising for companies revenue-wise, with a 20% increase compared to revenue from the start of 2024. Media billings have increased by 13%. Responding agencies are predicting a 66% increase in revenue between 2024 and 2025, showing optimism about this year's performance in our sample group.

While reported revenues grew year-on-year, the profit margin for responding agencies in 2024 was lower than that for responding agencies in 2023 (4% vs 8%). This could reflect increased costs and challenging macro-economic circumstances and could also be influenced by sample size limitations. The average predicted profit margin for 2025 is 7% as reported by responding agencies.

Income from retainers is reportedly making up a greater portion of responding companies' revenue compared to previous years. In 2024, responding agencies reported that 36% of revenue came from retainers, compared to 22% reported the previous year. This could demonstrate a shift in focus to maintaining strong client relationships, perhaps as a response to the increasing investment required by pitching processes.

7.2m average revenue for respondents

4% Profit Margin reported in 2024

2025 YTD average revenues increase 24%

Executive Summary: New Business

95% of respondents won new business since the start of 2025. 32% have also lost business in the last 12 months, the estimated value of which is reported as €4.1 million on average. All of these losses were reportedly from private sector clients.

The practice of pitching for businesses continues to grow, with responding agencies undertaking an average of 28 pitches in 2024 (up from 20 in 2023).

The average pitch income reported for the year was €440k, however the average reported cost per pitch was €40.8k. Based on the average number of pitches reportedly undertaken in 2024, it is estimated that the companies who responded to our census spent an average of €1.1 million on pitching last year.

The greatest cost element is staff time, with respondents citing an average of 10.4 thousand hours spent on pitching in 2024 – the equivalent of 5 full-time employees' yearly hourly allocation.

On average, respondents predict it takes 4 months to recover and break even on new business wins from pitch activities.

Responding agencies are also expanding their international reach, with 55% reporting domestic clients are using their services in international markets. 59% of respondents also say they export services to clients in other markets.

50% of respondents are working with Irish indigenous brands established in the last five years and report achieving an average of 14% growth for these brand with their services.

95% have won new business in 2025

Pitching cost €1.1m per agency in 2024

Average pitch income in 2024 was €440k per respondent

55% of Irish clients using services abroad

Executive Summary: Talent

The total workforce employed by IAPI members is estimated at 3,007 (an 11% increase since 2024). This figure is the only one in our report not only based on survey responses but on direct agency reporting at the end of 2024.

According to census data, the highest volume of staff are operating in Client Services, Creative Services and Media Planning departments.

Over two-thirds of all staff employed by agencies are reportedly aged between 26 and 45 years. According to responses, staff costs currently account for around 65% of annual revenue.

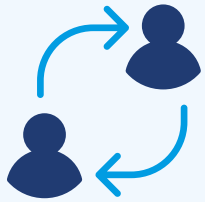
Staff turnover was reported at 14% in 2024, a 3% increase from 2023. Respondents from integrated media and creative agencies reported turnover rates of 26%, significantly above the average reported figure.

Over two-thirds (39%) of respondents report social media skill shortages, with digital and strategic planning skills gaps also cited. Responding agencies' most prevalent educational needs are in digital platforms and communications, contemporary marketing and communications, and leadership in creative commercial communications planning. Despite reported skills shortages and needs, agencies report allocation of 4% of annual turnover to training and development.

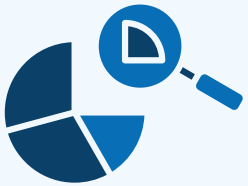
86% of respondents offer paid maternity leave and 68% provide paid paternity leave. The average number of paid paternity leave days responding agencies provide is 29, which is three times the figure reported in 2023.

Almost two-thirds (64%) of all respondents have either a three-day or two-day in the office approach. 86% of respondents agree their current working arrangements meet their business needs and 77% do not expect working arrangements to change over the next 12 months.

14% Talent Turnover +3% YOY



Skill gaps in social media, digital and strategic planning



86% believe their working arrangements meet the needs of their business

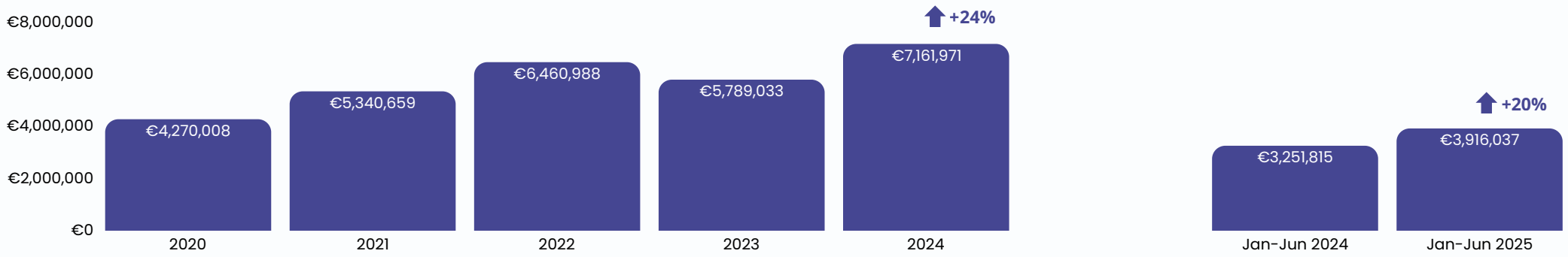
Commercial Performance

Average Revenue & Media Billings

Responding agencies' revenues grew by 24% between 2023 and 2024, indicating a bounce back after a decline of 10% YOY reported in the previous year. In the five-year period since the beginning of 2020, revenue has reportedly increased 68% YOY according to census results. Comparing the first 6 months of 2024 to the first 6 months of 2025, revenue is up by 20% according to census data.

While the data gathered in our census indicates a positive trend, it is important to consider these figures alongside the limitations of the smaller sample size and minimal representation among certain agency types in our sample. When only analysing the revenue figures reported by respondents who answered both last year's and this year's survey, the year-on-year revenue growth rate is reported at 22% and the growth rate for the first half of the year is reported at 18%. This direct matching strengthens validation that there is positive growth in the sector.

Q 3 - Please provide your revenue less non-salary costs (Average figure across respondents)

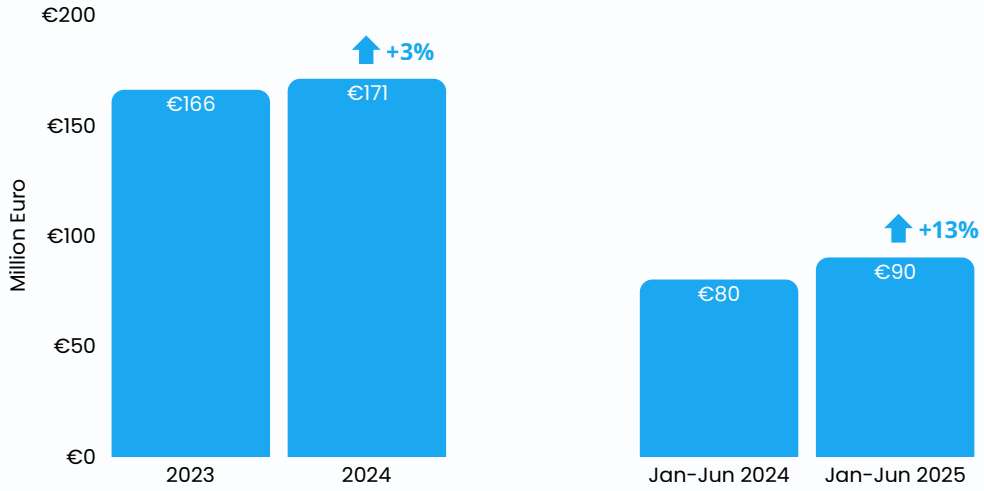


Average Revenue & Media Billings

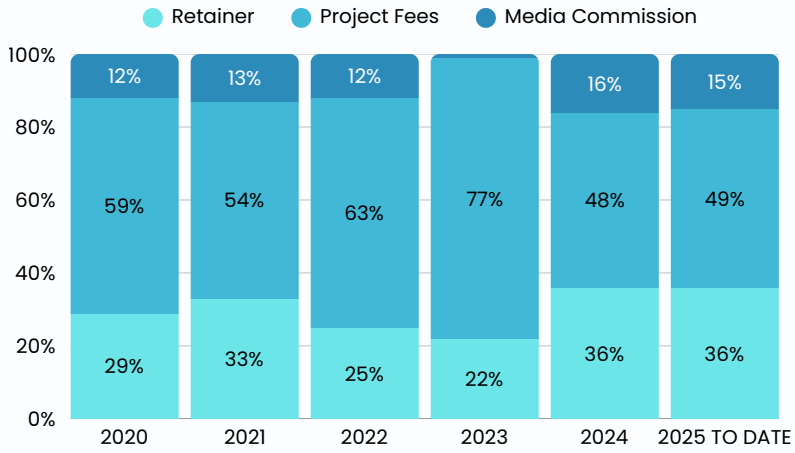
According to census data, responding media groups' average billings are reportedly up by 3% YOY and 13% for the first 6 months of 2025 compared to the first 6 months of 2024. These figures are taken from the same sample group who responded in both 2024 and 2025, allowing for more accuracy in reported media billings.

When looking at the breakdown in the makeup of respondents' revenue, income from commissions continues to be reported as the largest revenue stream. According to this year's census data, retainer fees seem to be making up a larger portion of revenue relative to previous years, indicating agencies are perhaps establishing strong client relationships and shifting their focus to retaining existing business.

Q 9 - Please provide a breakdown of your Media Billings
(Average figure for all respondents)



Q 7 - Please indicate the percentage split between retainer vs. Commission vs. Project fees within your fee income/revenue

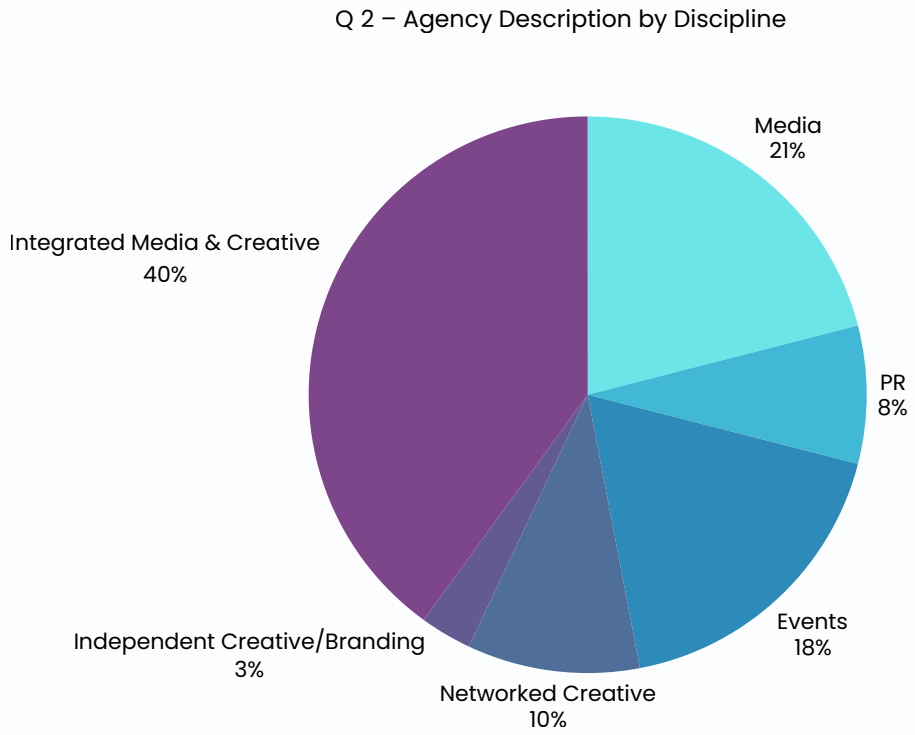


Revenue Distribution by Agency

Comparisons in average revenue reported average revenue by agency type. We then analysed these figures as a proportion of the overall revenue reported by respondents.

According to the survey data, on average respondents from integrated media and creative agencies reported the highest revenue figures in 2024, followed by media and events agencies. Independent creative/branding respondents reported the smallest revenue share in the sector overall.

We have not included the actual average revenue numbers by agency type reported by respondents as in last year's census due to the sampling limitations. However the chart indicates the proportional contribution of each sector to overall industry revenue.

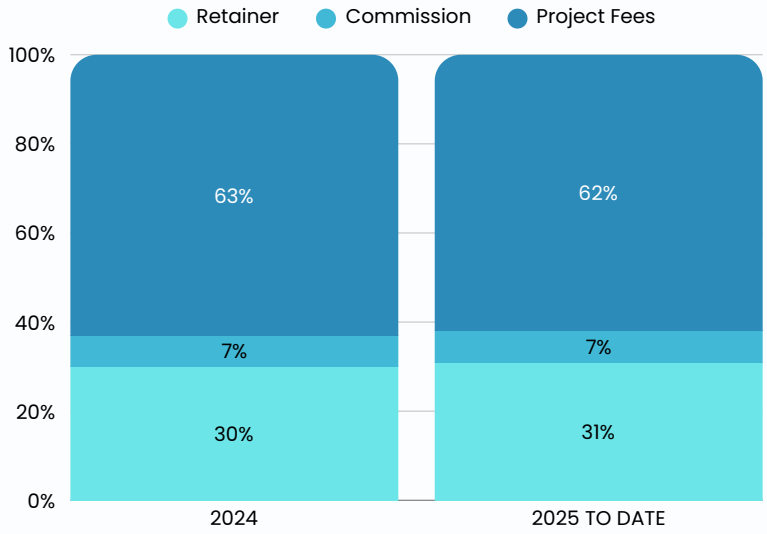


Revenue Breakdown

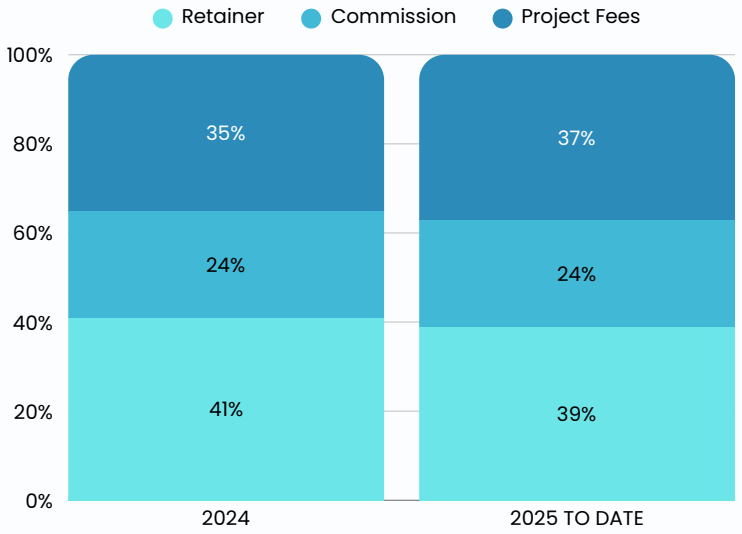
Respondents from creative agencies are reportedly less likely to see commission as a key revenue stream compared to other responding agency types, with this type of fee income accounting for 7% of responding creative agencies' overall reported revenue compared to 24% of all other responding agencies' total revenue.

Project fees, on the other hand, vital to this group of respondents, make up almost two-thirds of all revenue reported last year and in the first six months of 2025, according to responded provided to the census.

Q 7 - Please indicate the percentage split between Retainer Vs. Commission Vs. Project fees within your fee income/revenue (Creative agencies only)



Q 7 - Please indicate the percentage split between Retainer Vs. Commission Vs. Project fees within your fee income/revenue (All other agency types)



Profits, Predictions & Challenges

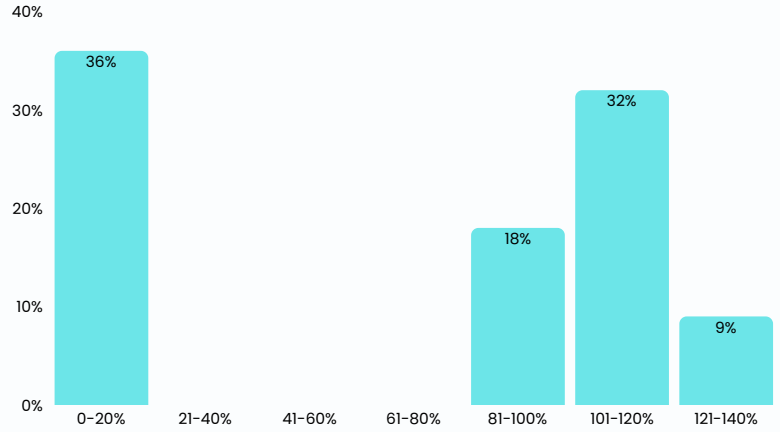
Respondents are reportedly feeling positive about their business performance this year, with 95% predicting increased revenue this year compared to 2024. On average, agencies predict a 66% increase in revenue between 2024 and 2025, although the predictions they reported range from -7% to +140%. The exponential growth predicted by certain respondents does skew this average and the distribution in respondents' reported revenue growth forecasts are explored in the chart below.

Responding media agencies are reportedly anticipating a 3% growth in media billings from last year, with estimates ranging from -15% to +20%.

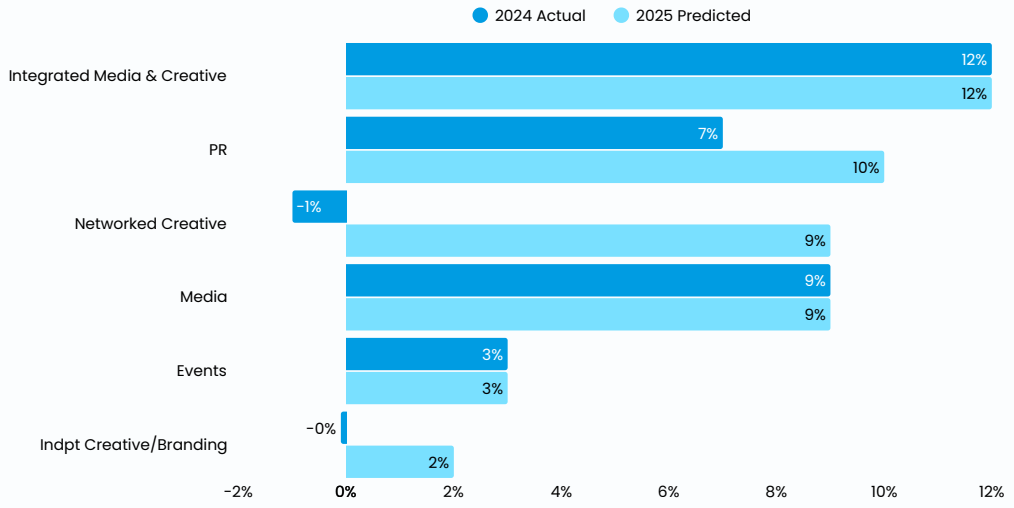
In 2024, census respondents reported an average profit margin of 4%, which was lower than the previous year's reported figure of 8%. It also fell below the expected profit margin of 10%, as reported in 2024.

In 2025, responding agencies expect a 7% profit margin on average, with respondents from integrated media and creative and PR agencies predicting the highest profit margins.

Q 5 - Please provide your % increase/decrease forecast for your annual Income / Revenue for 2025 vs 2024



Q 4 - Please estimate your profit margin % (EBITDA) for 2025 & Please indicate your profit margin % (EBITDA) for 2024



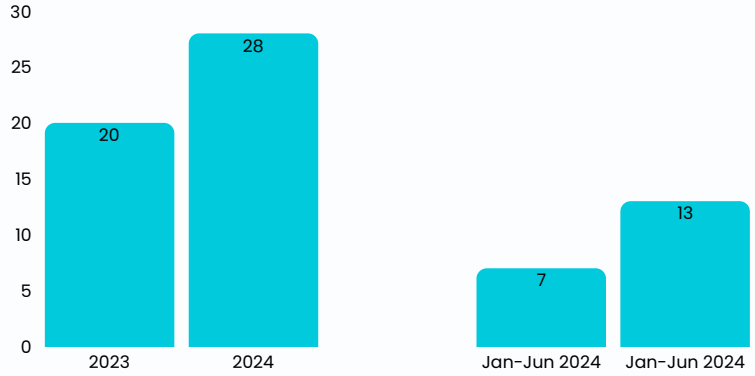
New Business

New Business & Pitching

95% of respondents have won new business since the 1st of January 2025, with only one respondent reporting no new business won.

32% of responding agencies have also reportedly lost business to other jurisdictions in the past 12 months, with estimated value of this lost business was reported as €4.1 million on average. This varied by agency type, with respondents from media agencies reporting the highest value losses on average (€8.9 million). No Public Sector business was reportedly lost to other jurisdictions.

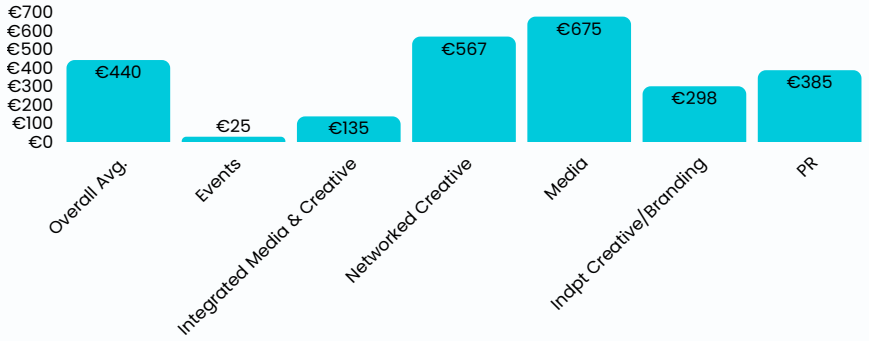
Q 19 - How many pitches have you undertaken?
(Average figures from 2025 Census & 2024 Census)



Pitching is still reportedly increasing across the industry and in 2024, each respondent undertook an average of 28 pitches. In 2023, this number was 20, showing a year-on-year increase of 40% in the volume of pitches responding agencies are involved in. In the first six months of 2025, respondents have taken part in 13 pitches on average. Again, the different respondent sample groups must be taken into consideration when looking at the year-on-year trend comparison.

The average fee income from the pitches respondents undertook this year was reported as €440k, although this varied by agency type. As a reminder when viewing the pitch revenue comparison by agency type, the figure for events agencies is based on information provided from one sole responding agency and therefore cannot be considered a representative figure for events agencies across our sector.

Q 20 - What is the estimated average fee income/revenue (in thousands) of the pitches you have undertaken this year? (By agency type)

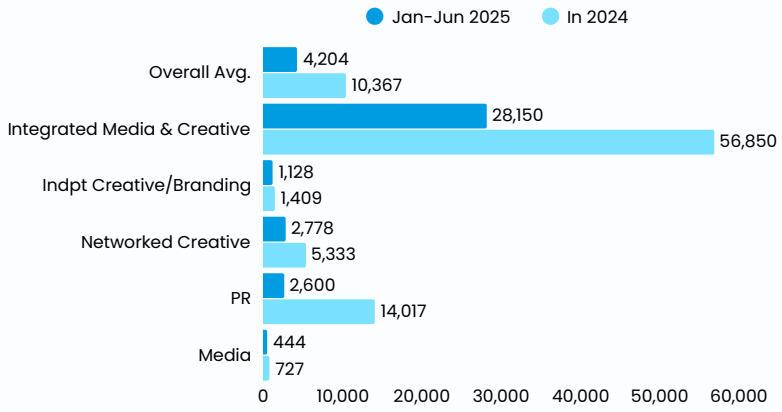


New Business & Pitching

In 2024, respondents reported that an average of 10,000 hours were spent on pitches. The FTE (full-time equivalent) of this is 260 weeks. In other words, the workload involved in pitching last year for each responding company was equivalent to that of 5 full-time employees.

As hours are increasing, the average cost per pitch is also growing according to our data. In 2024, this cost was calculated at €40.8k per pitch based on census responses. Staff hours reportedly make up 89% of this cost, with the remaining costs spent on third party expenses. On average, respondents report it takes 4 months to breakeven on new business wins from pitch activities.

Q 21 - On average what is the cost to your agency per pitch in staff hours (By agency type)



Respondents from Independent Creative and Branding agencies reported the highest costs per pitch and those from events agencies the lowest. Respondents from Media agencies interestingly reportedly spend around double the average on third party costs for their pitches.

Q 21 - On average what is the € cost per pitch to the nearest thousand in staff hours & in 3rd party € costs (By agency type)

New Business & International Reach

50% of respondents reported their domestic clients are using their services in international markets and 9% report that although their clients are not currently using their services internationally, they intend to.

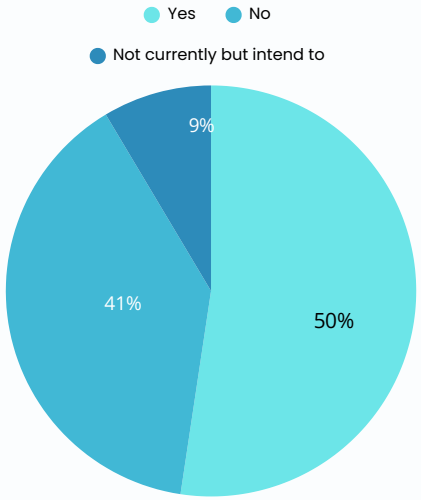
Of those clients who are using agencies' services internationally, respondents say 12% on average are exporting these services.

59% of responding agencies are also exporting services to clients in other markets and 23% report although they are not currently, they plan to in future.

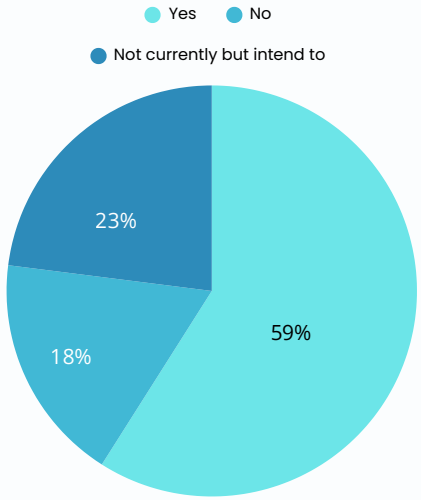
50%
working with new Irish brands

+14%
growth achieved for new Irish brands

Q 14 - Are your domestic clients using your services in international markets?



Q 16 - Is your company exporting services to clients in other markets?



Half of all respondents (50%) are working with new Irish indigenous brands which have been established in the last five years. Of these, the average growth responding agencies' services have reportedly achieved for the brand is 14%, demonstrating the strong value add agencies can provide in this space.

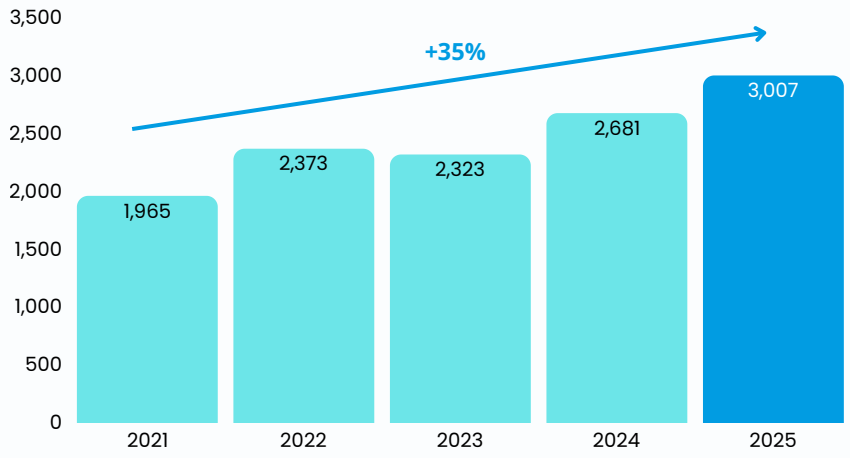
Workforce

Industry Employment

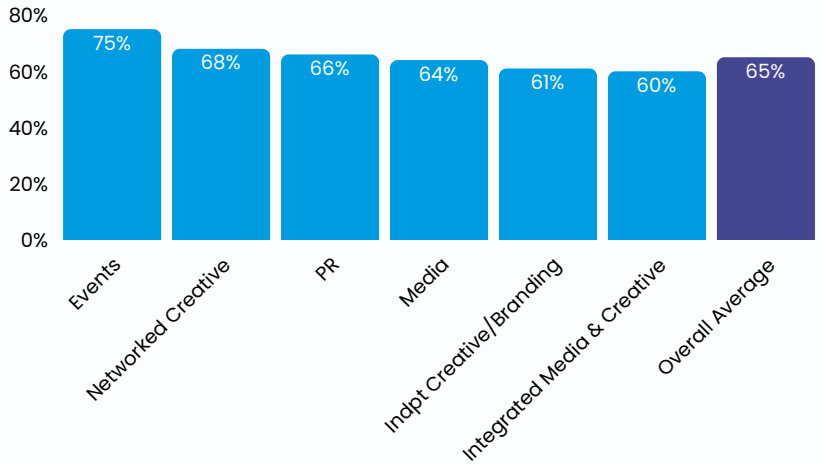
The total workforce employed by IAPI members increased by 11% year-on-year to 3,007 employees. Since 2021, the number employed has grown by 35%. The workforce figures are not taken from the census data but are based on direct outreach and are therefore representative of the IAPI membership base. These numbers are the only figures in this report which do not come directly from the census data.

Currently, responding companies estimate that on average 65% of their annual fee income/revenue is represented by staff costs (e.g. all employment costs including training, recruitment costs, etc). This varies by agency type, with respondents from events agencies reportedly spending the highest proportion of revenue on staff costs and those from integrated media and creative agencies the least. It is important to note that the events agency figure represents the response from one sole respondent and is therefore limited in its representation.

Total number employed by IAPI members
(Based on direct outreach not census data)



Q 30 - Please indicate the % of your annual fee income/revenue represented by employee costs (By agency type)

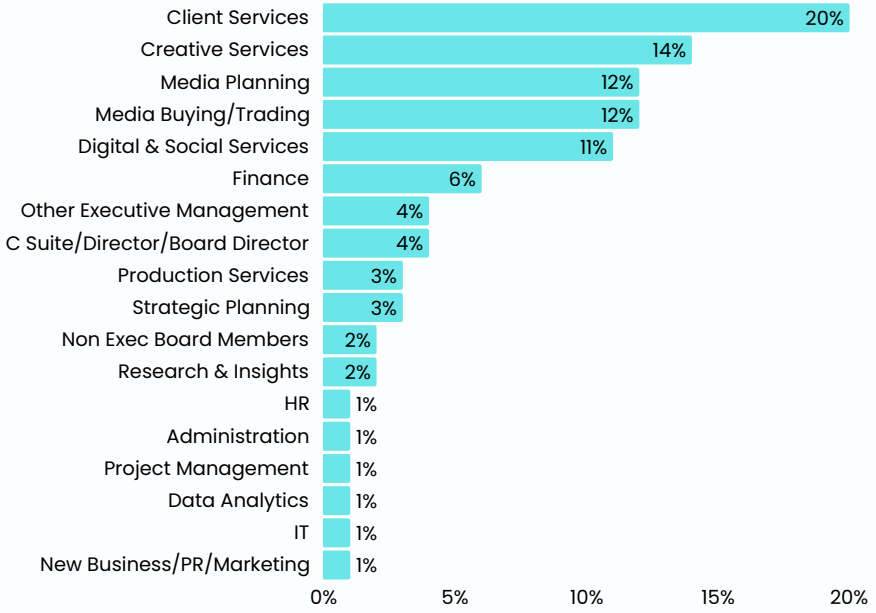


Total Workforce

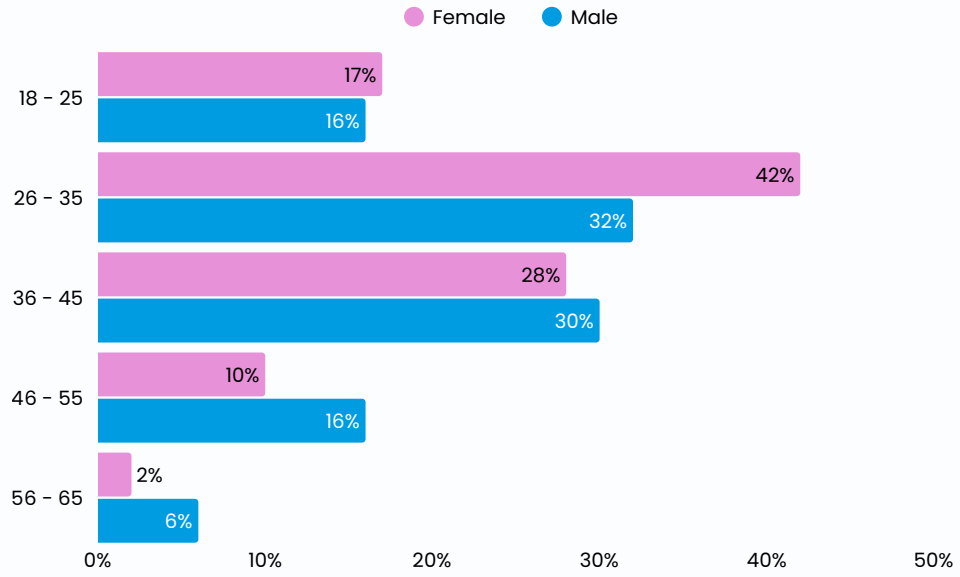
The highest numbers of staff in the sector are employed in client services, according to respondents. In the 2024 census, client services was the third largest employee group, with this year's data indicating an increasing focus on client relationship management.

Over two-thirds of all staff employed by responding agencies are reportedly aged between 26 and 45 years. 58% of this reported workforce are female employees and 42% are male. According to census response data, males make up a greater proportion of those aged 46 and over compared to females (22% compared to 12%).

Q 33 - Please indicate the numbers you employ in each function



Q 32 - Please segment your permanent employees across the following age groups



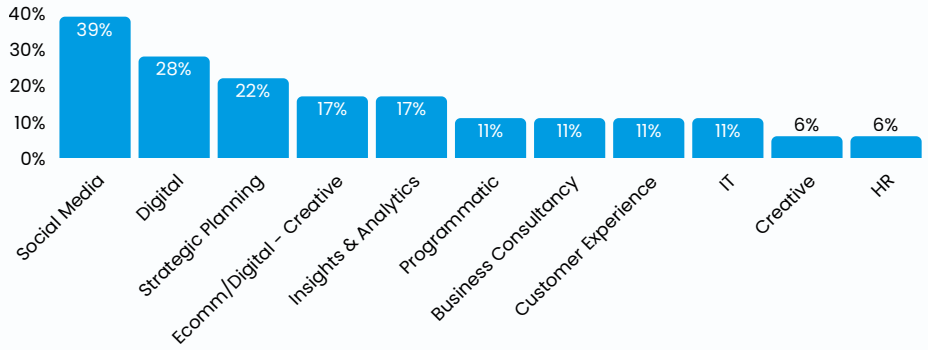
Staff Turnover & Skill Gaps

Staff turnover appears to increase year-on-year, with average turnover this year reported by respondents at 14%. This 3% increase from last year is mainly driven by a large rate of employee turnover reported by respondents from integrated media and creative agencies (26%).

The 2023 data was based on the responses of 20 agencies and this year's data was based on 21 respondents. This strengthens the relevance of the turnover trend for readers, however it isintegral to take these figures as indicative and not directive due to the small sample size of this census.

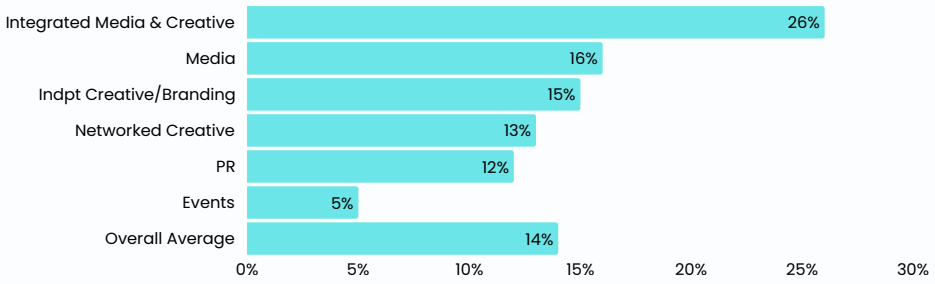
The most common type of skill shortage responding agencies report experiencing is in social media skills, with 39% of all respondents saying they are experiencing shortages in this area. Despite increasing turnover and skills shortages, respondents are supposedly only allocating an average of 4% of their annual turnover to training and development for staff.

Q 35 - If relevant, please select from the following list if your company is experiencing skill shortage

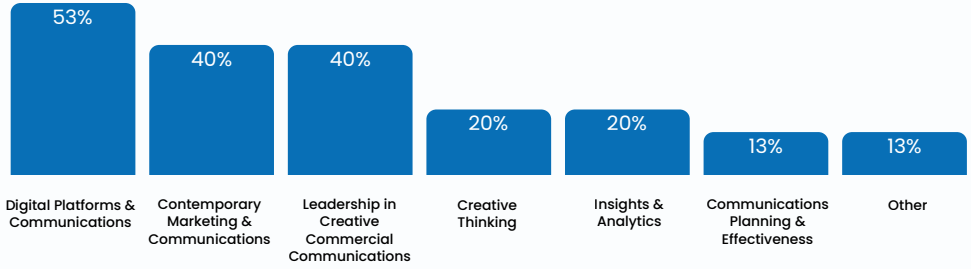


Respondents say the most prevalent educational needs are in digital platforms and communications, contemporary marketing and communications and leadership in creative commercial communications.

Q 34 - What is the average employee turnover in your company (excluding retirements and redundancies)? (By agency type)



Q 36 - Please indicate if your company has educational needs in any of the following categories



Maternity & Paternity Paid Leave

According to census data, paid maternity leave is increasingly being provided by responding agencies. Currently, 86% of respondents reportedly provide paid maternity leave, up from 83% reported last year.

68% of responding agencies reportedly provide paid paternity leave currently, which is a slight decline on the figure reported last year by census respondents (74%).

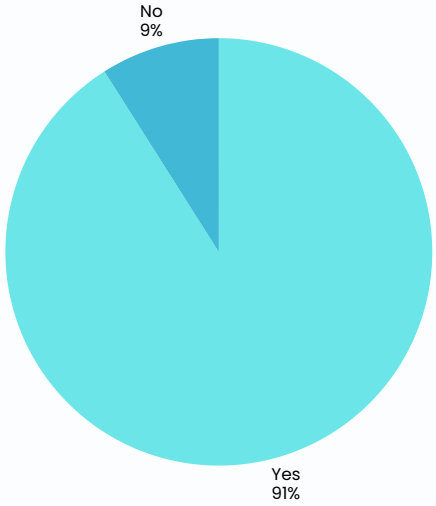
However the average number of paid paternity leave days provided by these respondents is 29, which is almost triple last year's reported number of 10 days. This ranges considerably depending on the respondent, with 5 days cited as the minimum amount and 150 days as the maximum.

Q 38/39 - Does your company provide paid maternity leave? & Does your company provide paid paternity leave?

Employee Wellbeing & Working Arrangements

Almost all (91%) respondents say their company has implemented initiatives to support employee wellbeing.

Q 41 - Has your company implemented initiatives to support employee wellbeing?

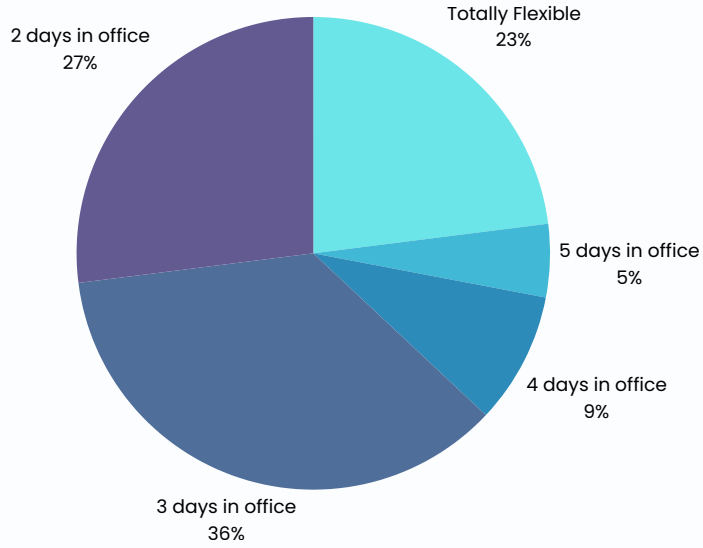


For the majority of responding agencies, employees are in the office three days a week (36%), with around a quarter of respondents also reportedly adopting a two-day in the office or a fully flexible approach. Only 5% of respondents say they ask employees to be in the office five days a week.

In order to assess potential changes to respondents' working arrangements, they were also asked if, given the importance of in-person collaboration in creative processes, their current working arrangements meet their business needs. In response to this question, 86% of respondents agree that their current working arrangements meet their business needs.

Aligned with this, 77% of respondents do not expect working arrangements to change over the next 12 months, whereas 23% reportedly expect to see changes.

Q 42 - What are the working arrangements in your business?



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For any queries, please contact keith@iapi.com