



IAPI Spring 2023 Sentiment Survey

Executive Summary

The Spring 2023 Sentiment Survey was undertaken in March this year, and received the highest level of response, at 534, ever received by an IAPI survey of this nature.

Despite a challenging few years for the industry with COVID-19, Brexit and the affects of the Ukraine war, the responses were overall positive and consistent across all ages and all levels.



Pride in the industry is very evident, with 80% of respondents proud or very proud to work in the commercial creativity and communications sector, and three-quarters stating they would recommend it. Network agency respondents show the least pride in their industry at 56%, and Events/Experiential agencies the most at 95%.

Optimism for their own agency is strong compared to that for the industry as a whole, with 87% either optimistic or very optimistic about the future of their own agency and only two-thirds being optimistic about the industry. The positive uplift in sentiment for their own agency versus industry has been evidenced in every IAPI census survey over the past number of years.

2023 performance is predicted to be strong with 63% of respondents predicting their agency will do better or much better than last year. 29% predict it will do the same which is also positive as 2022 was a good year for the industry on average, and only 8% state their agency will do worse. Network agency respondents are again showing a more negative view with only half expecting a better performance and 15% expecting it to be worse compared to 2022.

Staying Power & Job Security is high with 60% stating they will stay in the industry for five years or more and 8 out of 10 feeling secure or very secure in their role. This reflects a less frenetic talent war with big tech, who have been cutting back on staffing levels recently.



It's still a fun industry according to respondents who scored communication, fun, culture and sociable aspects of working in their agency very well, with scores between 70-80% in their areas.

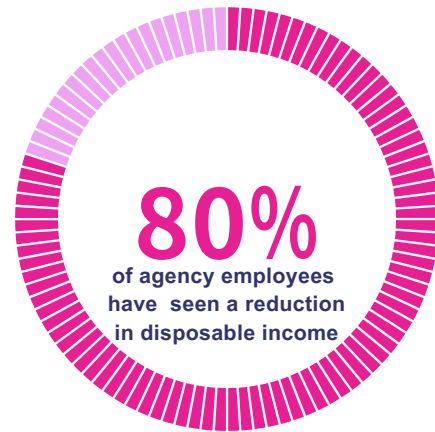


Executive Summary

Mid Managers are the most stressed with over a third state they are always stressed at work. They also displayed the least pride and feel the most undervalued compared to any other cohort in the industry. Three-quarters of mid managers are aged between 26-40 which is arguably the age of most financial and family pressure, so it is perhaps not surprising that they need more appreciation and support in the work place. Although it is interesting to note that despite this negative feedback, Mid Managers seem to have benefitted the most from hybrid working with over half of 26-35 year olds stating that their working experience has got much better since it's introduction.



Hybrid working is overall a better working experience according to 75% of respondents, with 8 out of 10 agreeing that their work life balance is better for it, albeit agency culture is still cited as a major challenge by 73% of respondents. After two years of hybrid working in the industry, it has settled with two-thirds of agency employees spending 2-3 days per week in the office, although those doing 2 or less days per week in the office is the most common. Only 8% work fulltime in the office, with a similar number working fulltime from home.



Cost of Living is hitting agency employees with nearly 8 out of 10 respondents agreeing that their disposable income has reduced considerably in the last six months, and 30% stating that they are struggling to make ends meet. On a more positive note, over half agree or strongly agree that they still have enough disposable income to do the things they like to do.

Housing Costs take up on average 29% of respondents disposable income, with Energy & Utility costs eating up between 15-20%, and commuting or car costs taking up 10%. On average childcare takes up 9% of income, although this increases to 15% at the Leadership level.





Executive Summary

Current state of mind findings indicate that **stress levels at work** remain high, with 30% of respondents stating that they are always stressed at work. Encouragingly, 78% feel able to ask managers for help, and over half feel that they can talk openly about their mental health at work. This would imply that the work being undertaken by the industry to promote good mental wellbeing is beginning to take effect.

Familiarity with **smash, the Employee Assistance Programme** for all IAPI members, funded by TABs, is low with only 43% stating awareness of the programme, and much lower numbers among the younger age groups. This is an issue given that mental health issues have been significant since Covid across this age group so this is a calling card for the industry to promote the services provided by smash, particularly those relating to legal, financial and career, in addition to free mental health counselling.

Diversity, Equality and Inclusion is perceived by respondents to be improving. 12% more respondents (a total of 74%) agree that the industry is moving in the right direction compared to the findings in the 2020 IAPI Sentiment Survey. 72% agree that 'working in a truly diverse and inclusive industry is an important factor in choosing where they work' (up by 11% from 2020), and 69% agree that they are 'happier to work with a client that has a truly DEI culture'.

Sustainability is naturally a priority for the industry and 91% of respondents believe that 'our industry has an important role in changing consumer behaviour'. While 75% agree that their agency is committing to sustainable initiatives such as Ad Net Zero, only 44% believe that their clients are actually committing to sustainable behaviours. 62% believe that Ad Net Zero will make a difference in reducing carbon emissions from the industry, with the majority, (78%), believing that IAPI has a strong role to play in ensuring that the industry adheres to Ad Net Zero.

"I would like to thank so many industry people for participating in this important sentiment survey. It provides a valuable snapshot of how IAPI member employees are feeling right now. As always, their constructive feedback is vital to ensure that agencies and IAPI are on track and prioritising the wellbeing of such a talented workforce," says Charley Stoney, CEO, IAPI. *"I am, as ever, in awe of the volume and quality of the work the industry delivers for brands, and seeing such positivity and optimism for it's future is energising."*

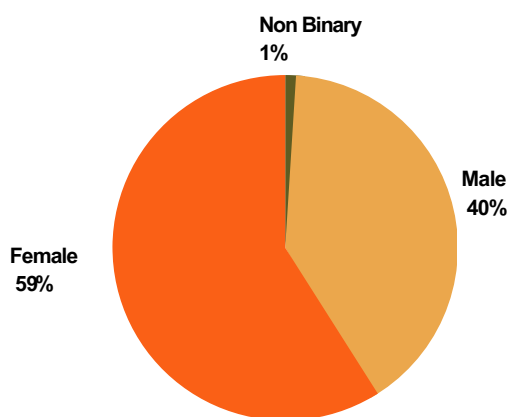


Survey Participation

Participation Age & Gender

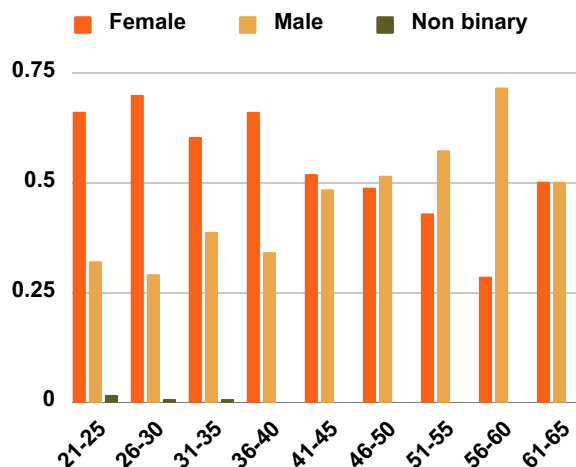
Gender Identification

Overall, the respondents' gender profile reflects the average split across the industry with female to male ratio of 6:4. Those identifying as non-binary were all in the 20-25 year old age range.



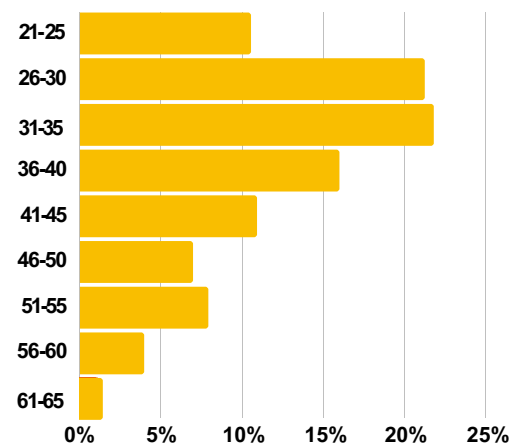
The gender split across the age groups clearly demonstrates the shift over the years as more females have entered the industry.

Males tend to dominate past the age of 50 in the industry reflecting both the dominance of men entering the industry 30 years ago and also, the numbers of females still leaving the industry at the most senior levels.



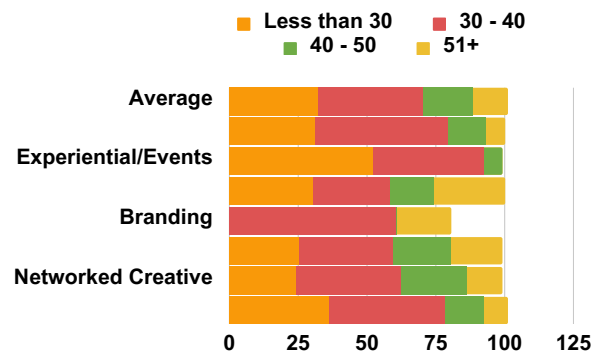
Age Range

One third of respondents were aged 20-30, another third aged 30-40 and the remaining third between 40-65.



Respondents age range across agency types is relatively consistent, with the exception of those from branding agencies where no one under 30 took part in the survey.

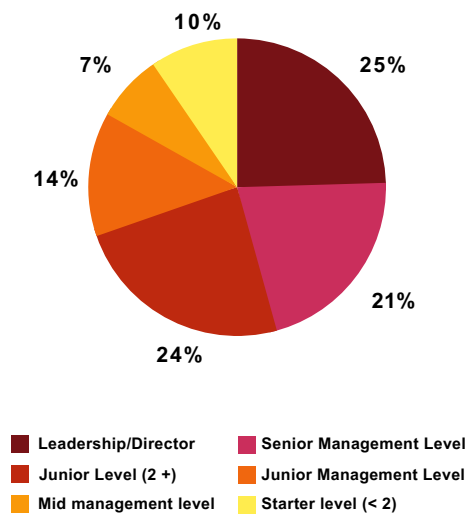
It appears that the experiential and events sector has the largest percentage of talent under 30 and the creative agencies appear very evenly spread across the age ranges.



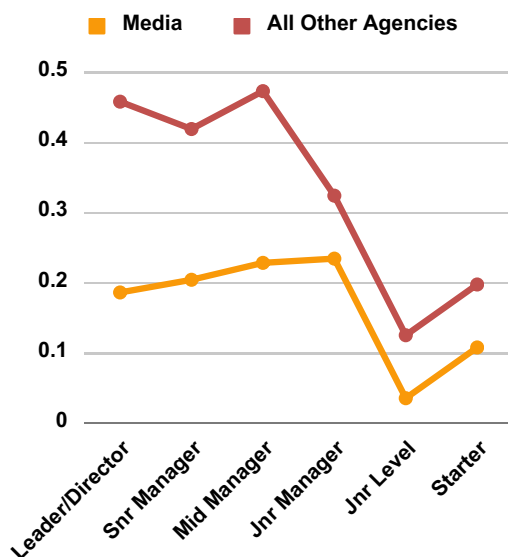
Participation Role & Agency Type

Participant Level

The majority (70%) of respondents are in the mid manager to director level with less than 20% within the starter or junior levels.

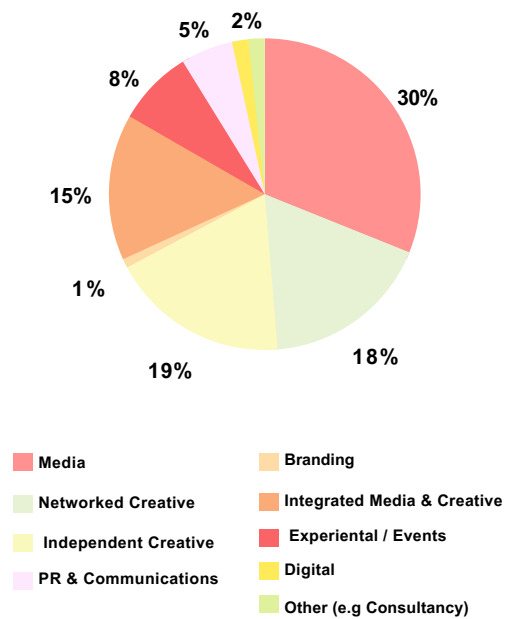


While the role level described by respondents is similar across most agency types, there were more senior level respondents from creative agencies.



Agency Type

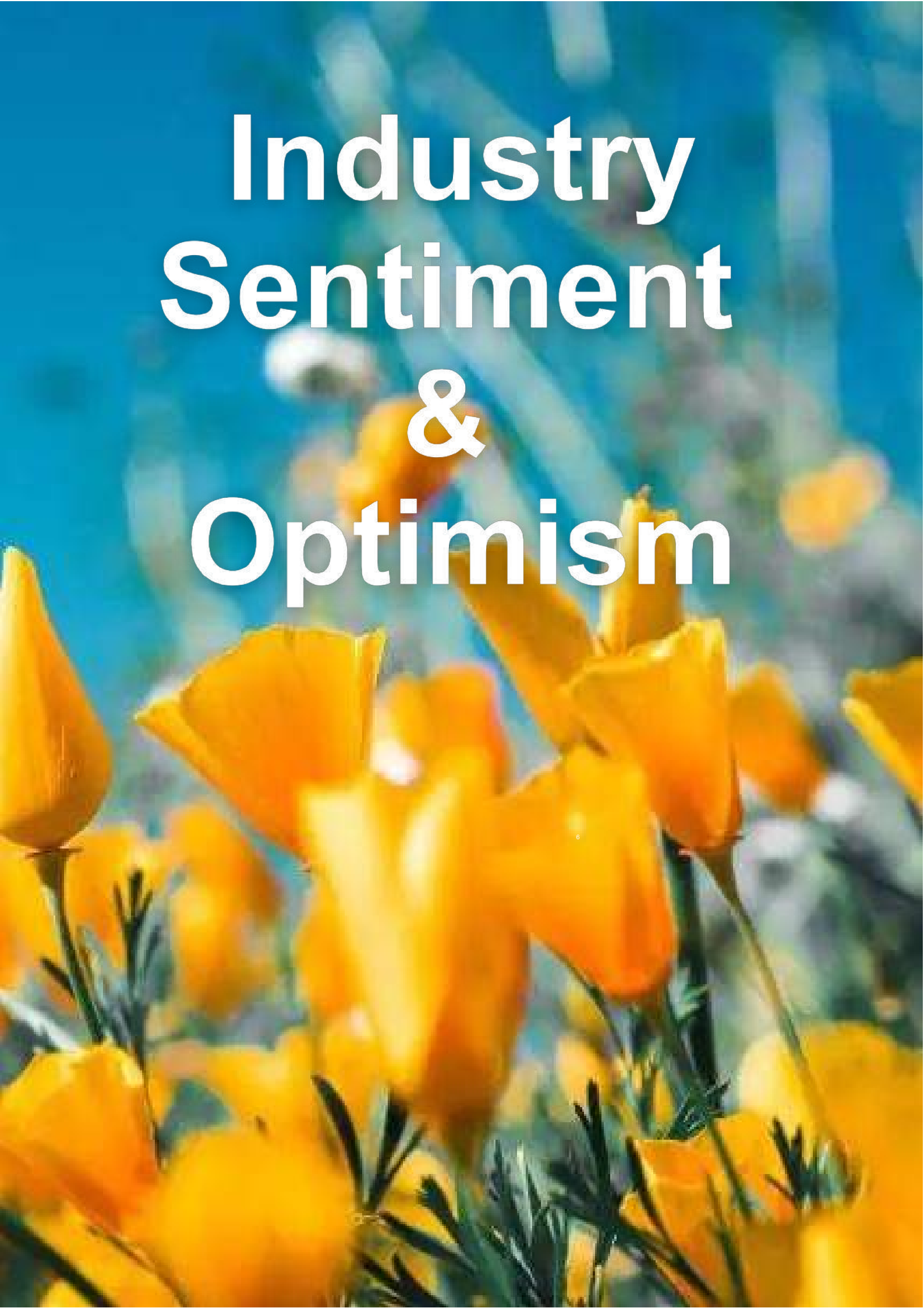
The descriptions and percentages of how each agency describes their business was as follows:



Agency types reflect the spread of IAPIs membership in 2023.

While the highest percentage of respondents were from either independent or networked creative agencies (36%), followed by media agencies (31%), experiential and PR agencies are becoming an increasingly active part of the IAPI membership.

Industry Sentiment & Optimism

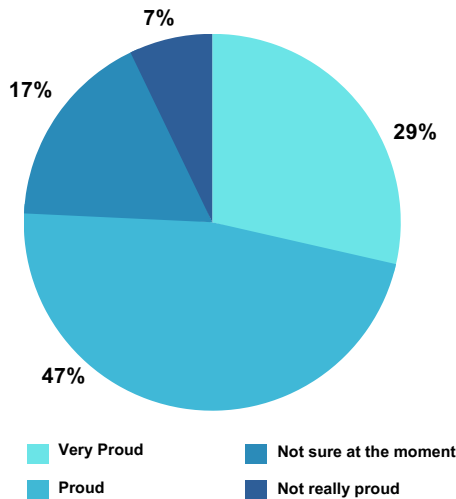


Pride & Referral

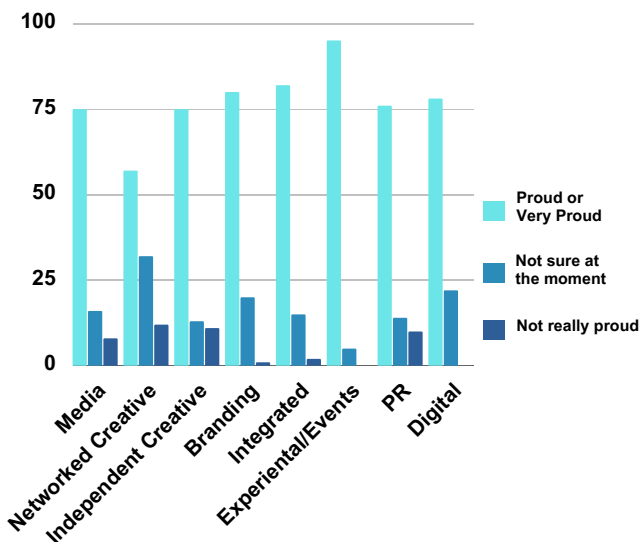
Pride in the Industry

Three quarters of all respondents state that they are either proud or very proud to be working in the industry, with only 2 respondents out of 534 feeling not at all proud.

Those aged under 25 and over 45 seem most proud (80%+ being either proud or very proud), with those aged 31-40 least proud, (25% not sure or not really proud.)

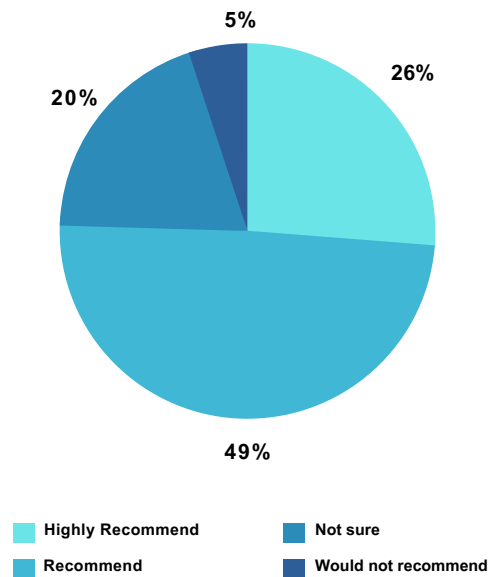


Pride in the industry is fairly consistent across all the agency types except for Experiential & Events agencies showing the greatest level of pride at 95%, and Network Creative agencies showing the least at 56%.



Recommending the Industry

Positive feedback is received overall in this area, with again, 75% of respondents stating they would recommend or highly recommend the industry.



Under 25 year olds are the most likely, at 95%, to recommend or highly recommend the industry, as well as those aged over 50, while 11% of those in their 40s would NOT recommend the industry vs. only 3% within the other age groups.

In correlation with having the least pride, respondents from networked creative agencies are the least likely to recommend, with 10% saying they would NOT recommend vs. the average across other agency types of 3%.

Staying Power & Security

Staying Power

What is very encouraging to see is the high levels of stated staying power across all respondents and all levels with nearly one third stating they will stay in the industry for the rest of their career and, on average, 6 out of 10 saying they see themselves staying in the industry for 5+ years. Mid-level Managers are most at risk, reflecting previously noted sentiments from this cohort, with 17% not sure how long they will stay in the industry.

Starter and Junior levels are more inclined than might have been anticipated to view the industry as a long term career, with half stating they see themselves staying in the sector for at least 5+ years. However, they are also the most likely to leave within the next 2 years.

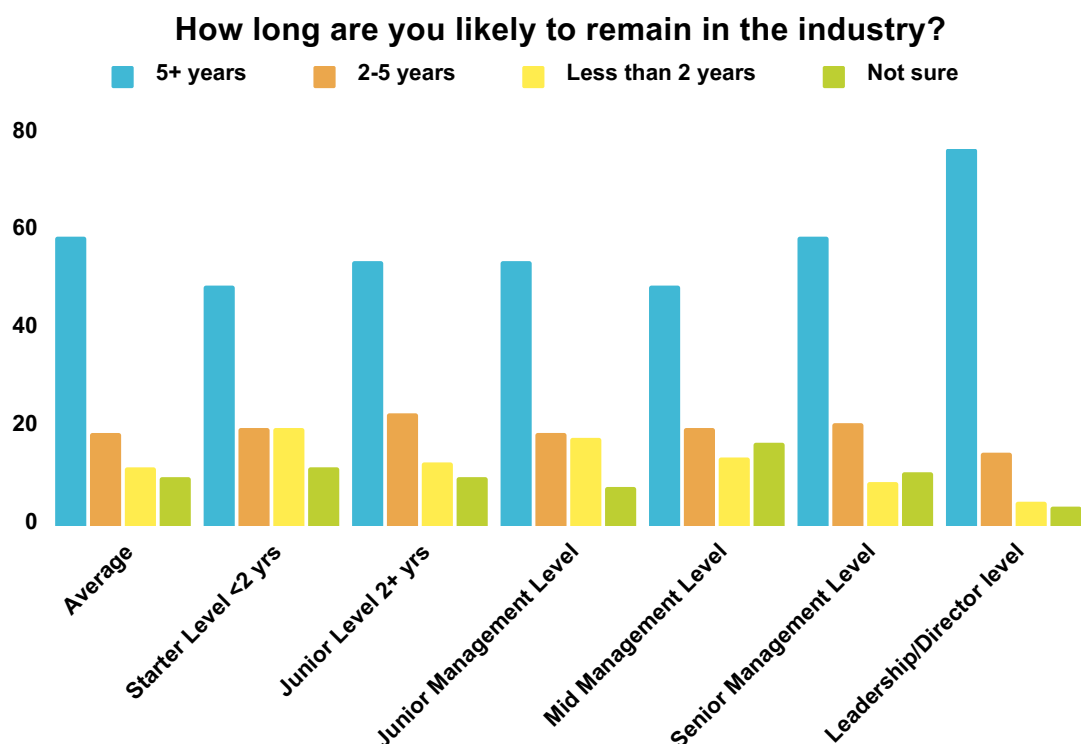
Stated tenure in the industry does not significantly change between agency types.

Job Security

On average a significant 83% of respondents feel secure or very secure in their jobs, which is a positive indication that the industry is standing its' ground in the current economic climate.

There is little difference across the age groups with the lowest levels of security felt within those aged 51-55.

There isn't a marked difference in job security across agency types except within Networked Creative agencies where job security is lower by 12% of respondents vs the average for the industry.



Employee Sentiment

Views on your own Agency

When it comes to views on their Agency, the majority scored communication, fun, culture and sociable aspects of working in their agency very well.

However, only just over half agree that their training and development needs are being met. The industry fairs well in training at the beginning of the career journey with nearly three-quarters of respondents from the Starter level (less than 2 years in the industry), agreeing that their training needs were being met. As talent progresses through the ranks they may feel their development needs are not being met.

There is little significant difference across the majority of roles in response to these sentiments and they are shown in the chart below as the average.

However, Mid Managers are the exception.

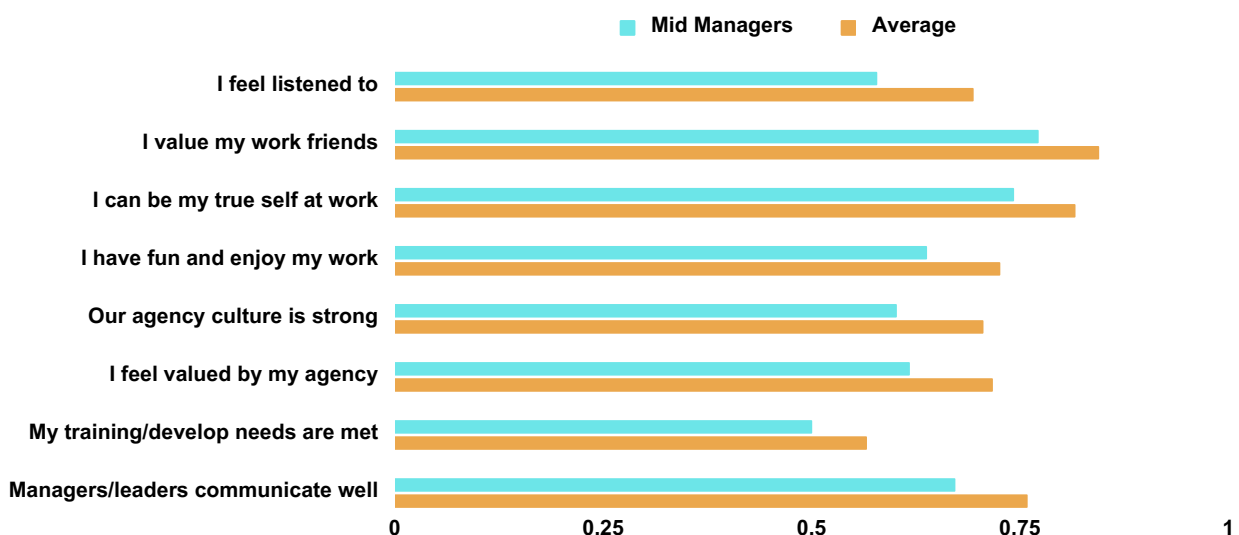
Mid Managers feel undervalued

Once again, we see more negative feedback from Mid Managers as they feel less communicated with, less valued, less listened to, less well trained, less sure of their agency culture, have less fun at work and are the least able to be their true selves at work compared to the other levels in the industry.

With nearly 25% of respondents at the Mid Management level, and assuming that this equates to the overall percentage across the entire industry, this is a significant cohort. Three-quarters of Mid Managers are aged between 26-40 which is arguably the age of most financial and family pressure, and it is therefore perhaps not surprising that they need more appreciation and support in the work place.

Another factor that might have a bearing on this sentiment is that Mid Managers spend less time in the agency than any other cohort. 30% of respondents from this level spend 1 day a week or less in the office compared to 20% on average, and they are also the talent group with the highest percentage working full time from home at 14%.

% of respondents that agreed with the following statements

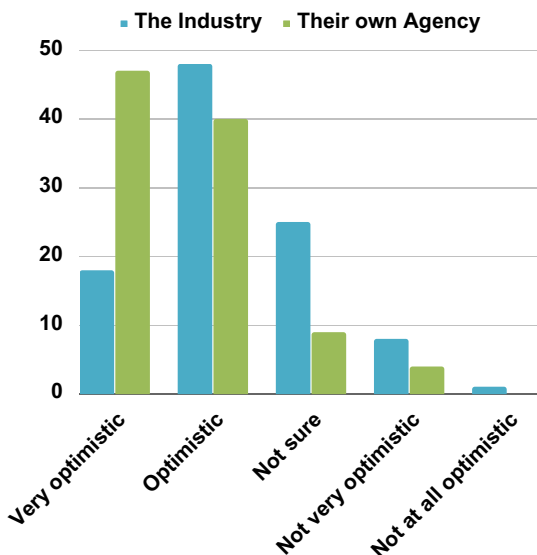


Optimism

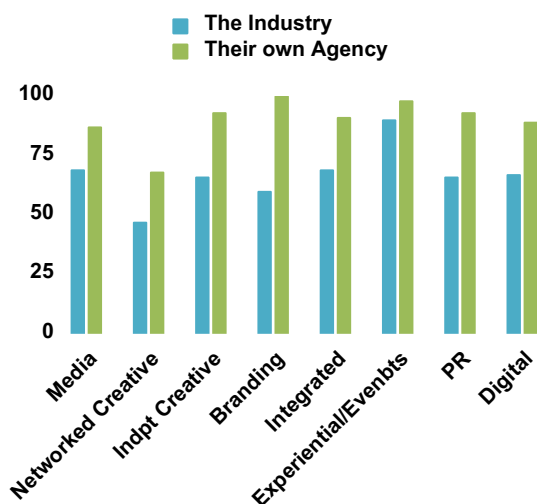
Optimism about the Future

Overall, there is strong optimism indicated for the future of the industry as a whole with two thirds either very optimistic or optimistic, and only 3 respondents out of 534 not at all optimistic.

The uplift in respondents' optimism about their own agency, with 87% being either optimistic or very optimistic, reflects employees strong belief in their own agency offering, which should be gratifying for agency leaders.

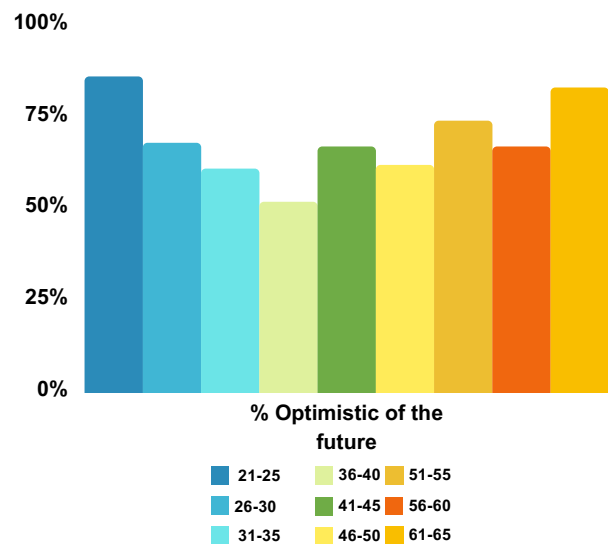


The majority of agency types are extremely optimistic about their own agency, although Networked Creative agencies again show a tendency to be less so.



Optimism by Age

There appears to be a marked difference by age group in terms of optimism for the future of the industry. The youngest and oldest groups are highly optimistic, while those in their 30s and 40s are the least optimistic. This possibly reflects the age group with the largest work pressures combined with the pressures of family life.



Optimism by Level

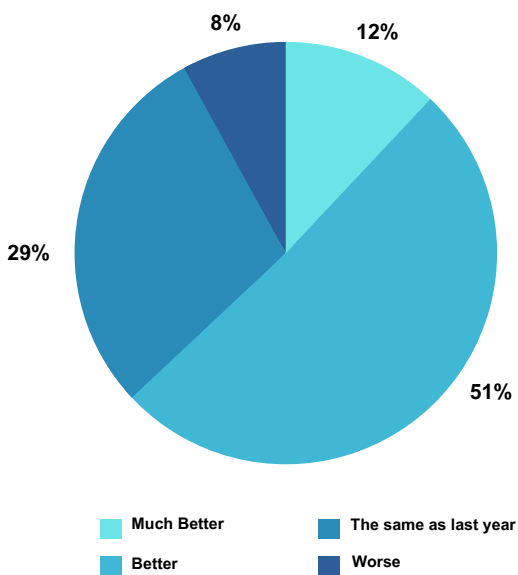
Further analysis into optimism by level again shows that less than half of Mid-level Managers (those with the day to day responsibility for operations and people), feel optimistic about the future of the industry.

However, 80% of the same Mid-level Managers are optimistic about the future of their own agency, with optimism extremely high at 95% for their own agency, among the most junior and most senior levels of respondents.

Predictions for 2023

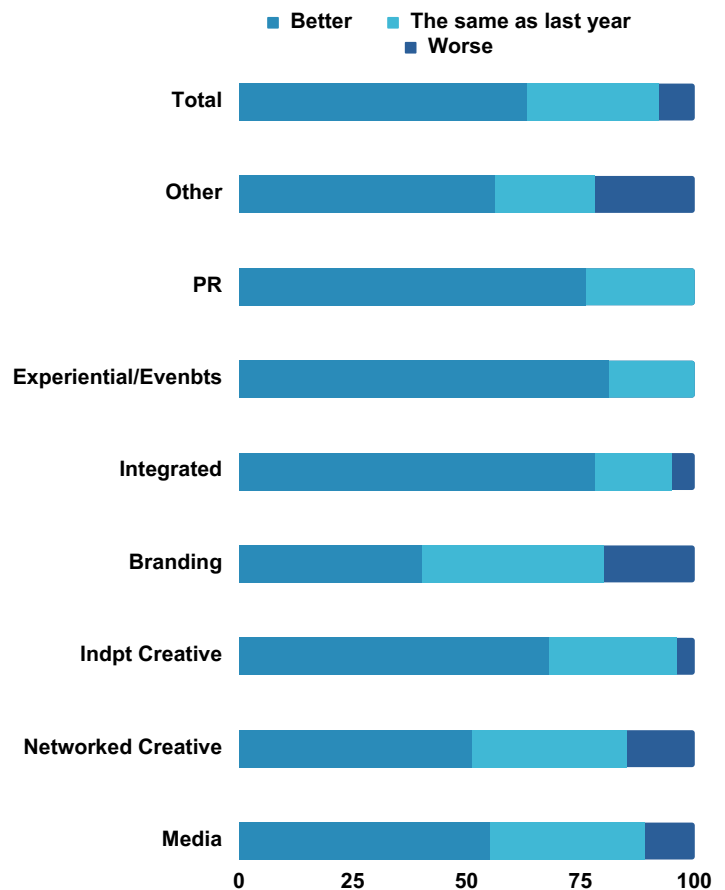
2023 Predictions

On average 63% of respondents predict their agency will do much better or better than last year with only 8% predicting it will do worse.



Predictions by Agency Type

Independent Creative agencies (70%) forecast a better 2023 than 2022 for their agency, vs. Network Creative Agencies with only half forecasting a better Year. Just over half the Media Agency respondents forecast a better year with 11% stating it would be down on last year.



Hybrid Working, Life Balance & State of Mind



Hybrid Working & Life Balance

Changing World of Work

With so much changing in the world of work we naturally dedicated several questions to the topic asking about balance and hybrid working. It is a brave new world for workers with flexibility becoming a key talking point for managers and employers.

Will big office spaces be a thing of the past? Or will there always be a hub where teams can meet when key decisions or creative huddles are happening. Do people work better in teams in person, or is online as effective?

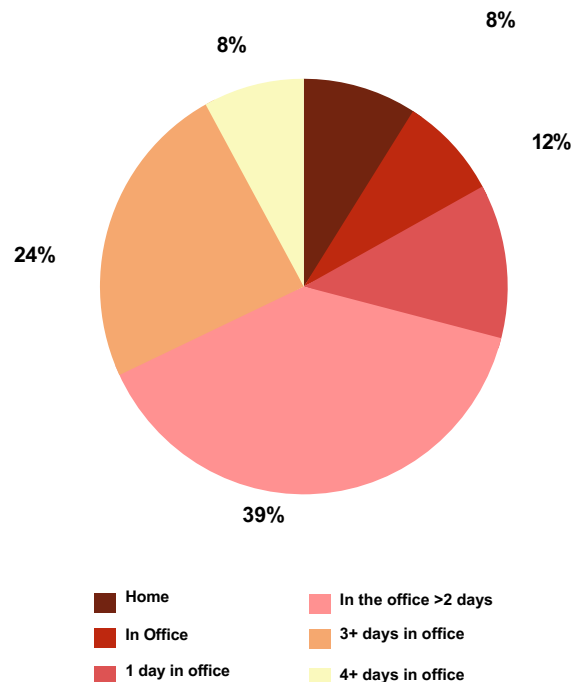
It looks like the topic will be a moving target until companies can decide on the best route for their employees and their clients. How will it auger in the future is still a work in progress.

Comparing the working location across agency types, PR agency respondents spend the least amount of time in the office with nearly 1 in 5 working fully from home vs. the average of 9%. Nearly half of PR agency respondents spend only 1 day a week or less in the office vs. the average of 12%.

Events and Experiential agency respondents spend the most time in the office with one third working full time within their agencies offices vs. the average of 8%.

Where are you spending the working week?

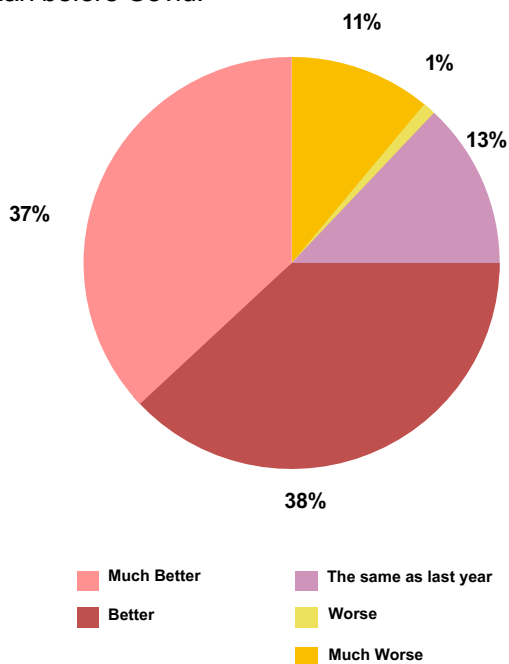
When asked where they spend their working week, only 8% of respondents stated they were working full-time from the office, with the vast majority (60%), working from the office 2 days or less per week. 9%



Hybrid Working & Life Balance

Is Hybrid better for your working experience?

75% of respondents say that hybrid working is better or much better for their working experience than before Covid.



The age group that seem to have gained the most benefit from hybrid working are those aged 26-35 years of age with over half of this group stating that their Working Experience has got “much better” since hybrid working compared to 37% on average expressing the same sentiment.

87% agree that **not having to commute is a real bonus** with only 3.2% disagreeing with the statement.

Online vs. In-person Meetings

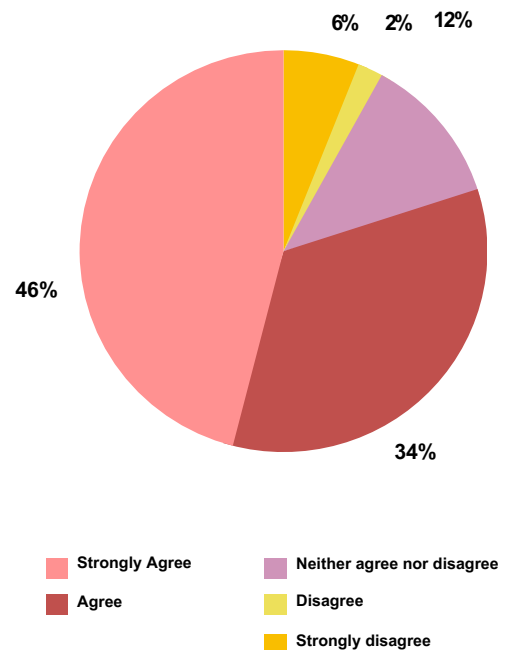
28% disagree that video was as good as in person meetings with 40% agreeing that they were as good. 37% of respondents agree in person meetings are a waste of time.

Preference for Working Remotely

48% strongly agree or agree that remote working is preferable with 63% of Mid Managers agreeing with this statement.

Overall Life Balance

Over 8 out of 10 agree or strongly agree that their work life balance is better for Hybrid Working.



Relationships with work colleagues

38% believe that relationships with their work colleagues are not as strong as they used to be, with nearly the same number 33% disagreeing with this statement.

Managing a team is better in the office

Opinion is divided on this issue with approx. one third of respondents agreeing with this statement; and the same number disagreeing. The remainder had no comment on this issue.

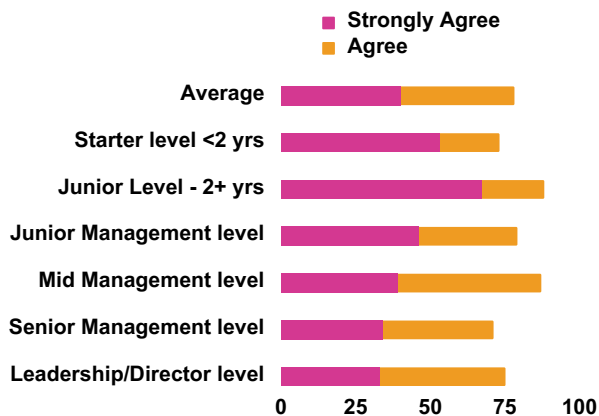
Being in the office is better for learning

On average nearly half the respondents disagreed that they needed to be in the office more to learn how to do their job better with 30% agreeing. However, this was different those at a more junior level within their career with 45% agreeing with this statement.

Cost of Living

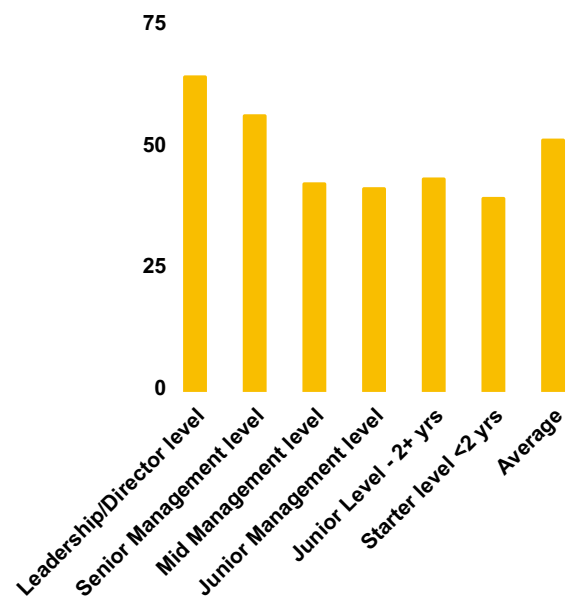
Reduced Disposable Income

78% of all respondents agree or strongly agree that their disposable income has reduced considerably in the last six months, with the same numbers stating that they have cut down on discretionary spend over the last few months. Those that feel the hardest hit are within the Junior Management, 90% of whom have cut down on discretionary spend. 87% of Mid Managers have also noticed this decrease and cut down on spending.



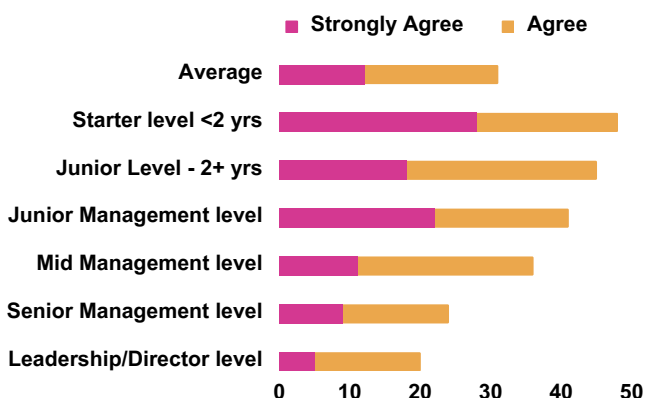
Still enjoying life

On a more positive note, over half agree or strongly agree that they still have enough disposable income to do the things they like to do. However, at Manager and Starter level only 4 out of 10 agree with this statement.



Struggle to make ends meet

On average 31% of respondents agree or strongly agree that they struggle to make ends meet. However, this depends entirely on where they are on the career journey as, naturally, those in more junior roles are struggling more than their senior colleagues.



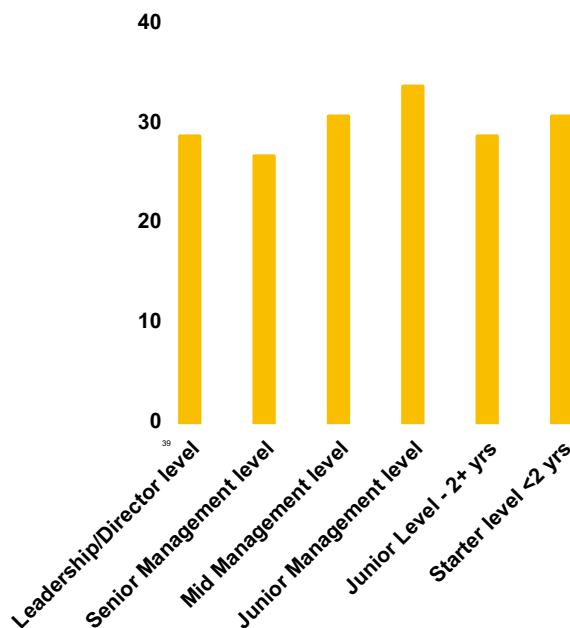
Where is their money going?

Expenditure Breakdown

Respondents were asked to provide an estimate for the percentage of their disposable income spent on key cost items: Housing, Commuting, Utilities and Childcare.

Mortgage and Rent naturally appear to be the largest cost area as they represent on average 29% of respondents disposable income.

When it comes to comparing average % by level, the difference is not significant with a range from 27% to 24% of income spent on housing.

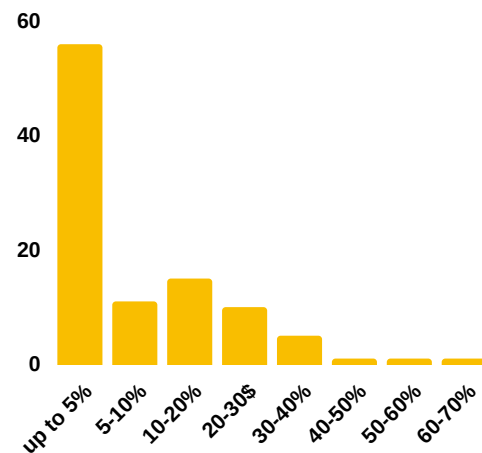


Energy & Utility costs are the second highest cost for respondents with over a third stating that they take up to 20% of their disposable income, and on average uses up 15% of their income.

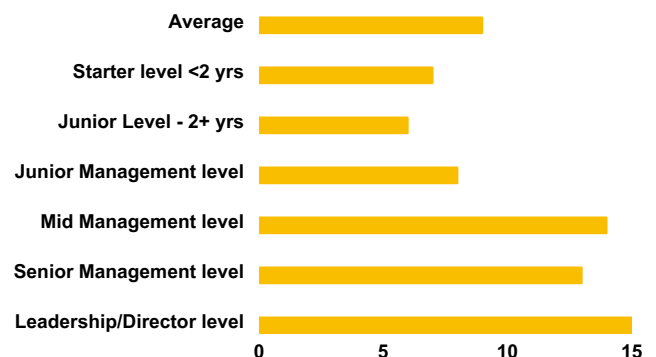
Car & Commuting costs on average use up 10% of respondents income.

On average 9% of respondents disposable income is spent on Childcare or Education, however, this differs as careers progress with Leaders spending 15% of their income in this area.

OVERALL % OF INCOME SPENT ON CHILDCARE/ EDUCATION



% OF INCOME SPENT ON CHILDCARE/ EDUCATION BASED ON AGENCY LEVEL



State of Mind

Challenges of Hybrid Working



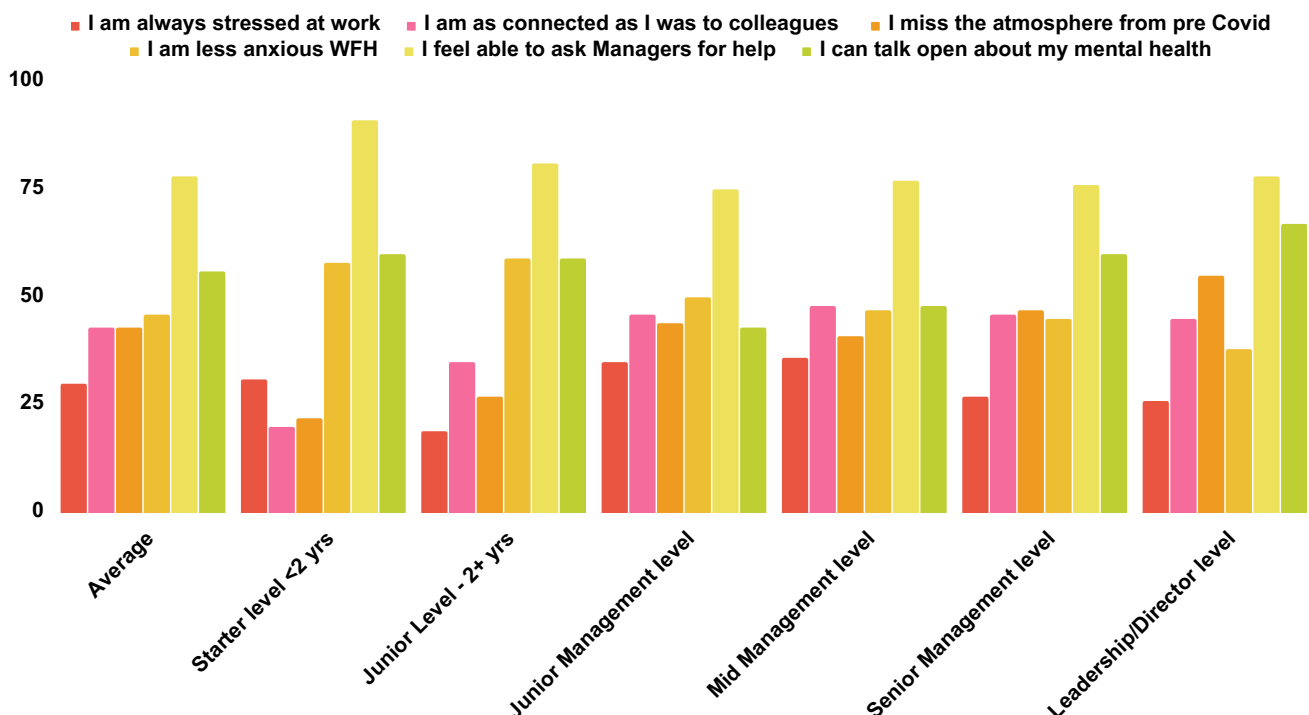
The biggest challenge perceived by all respondents is Maintaining Agency Culture with the second biggest Maintaining Relationships with Colleagues.

The challenges of hybrid working are heightened for the Starter Level, with 67% about maintaining relationships with colleagues. As you might expect, 36% of Starter Level respondents also stated that their home environment is not suitable for work, and 44% struggle with self-motivation.

Current State of Mind

With the highly publicised impact of the pandemic on mental health, the industry has focused on highlighting the importance of good mental and, as a result, it is encouraging to see that on average, over half of respondents state that they can talk openly about it.

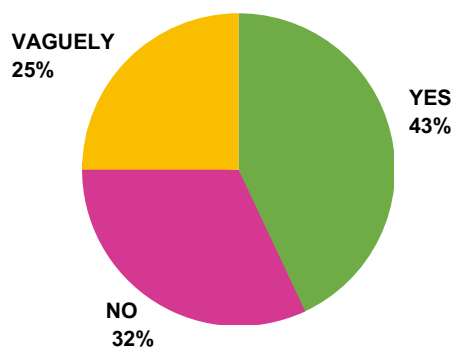
It is indicative of how busy the sector has been over the past number of years, that on average 30% of respondents state that they are always stressed at work. For Mid Managers, this increases to 36%.



Familiarity with *smash*

smash is the IAPI Employee Assistance Programme for member employees and their immediate families which was set up in 2019, and is funded by **TABS**. **smash** provides access to a whole range of advisory services through Spectrum Health, including counselling, advice on financial advice, career and legal issues and is accessible via iapi.ie.

The results below show that over half the respondents are only vaguely aware or not at all aware of **smash** and what it can provide for agency employees.



The younger cohort of respondents in particular are unaware of **smash**, which is an issue given that mental health issues have been significant since Covid across this age group.

Views on *smash* services

1 in 5 of the respondents have their own EAP programme through their agency so don't require **smash** services.

Over half know that they can use **smash** when they need it, however, nearly 1 in 5 are concerned about the confidentiality of using the service.

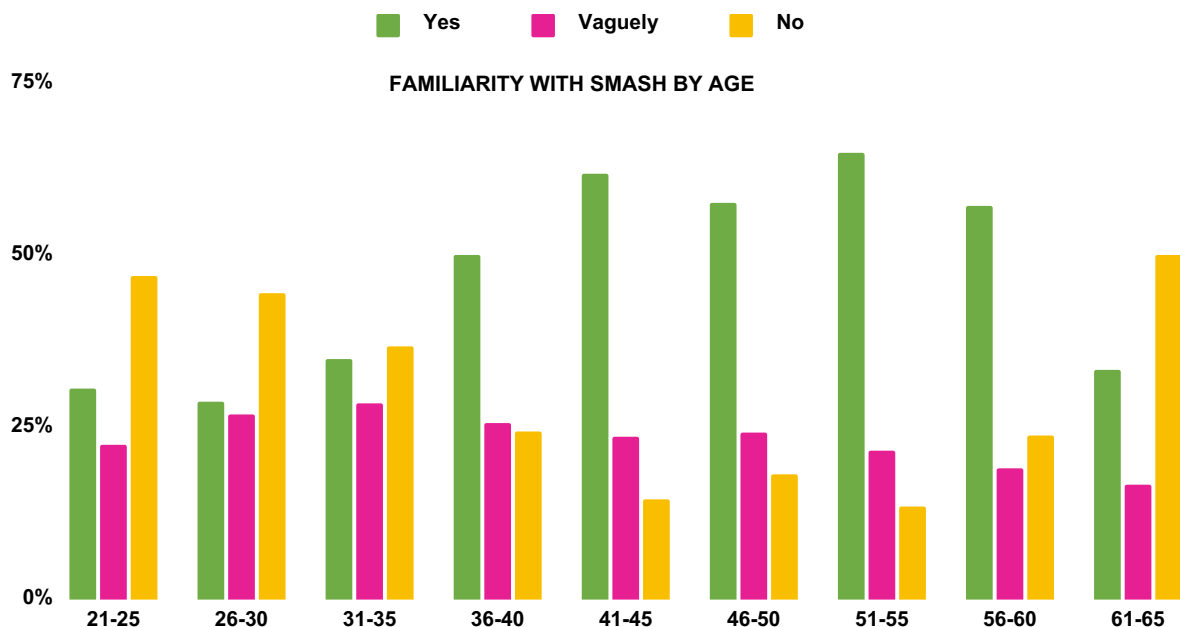
64% would like to know more about how they can personally help their team with mental health challenges.

Another two-thirds would like to know more about the Financial and Legal advice provided through **smash**.

Engagement

Overall engagement with **smash** is low (16%) and verbatim feedback demonstrates that there is not a full understanding of what it does and a lack of trust in its' confidentiality.

Respondents asked for more clarity, communications and regular updates on this programme to reassure employees and give them a better understanding of the range of services and advice on offer.



A close-up photograph of a field of purple flowers, likely lupines, with a soft, out-of-focus background. The text 'Societal Issues' is overlaid in a large, white, sans-serif font in the upper center of the image.

Societal Issues

Views on DEI

DEI will be an implicit part of every business going forward and none more so than in the commercial creativity industry, where having a diverse and inclusive workforce, that reflects the population as a whole, is imperative.

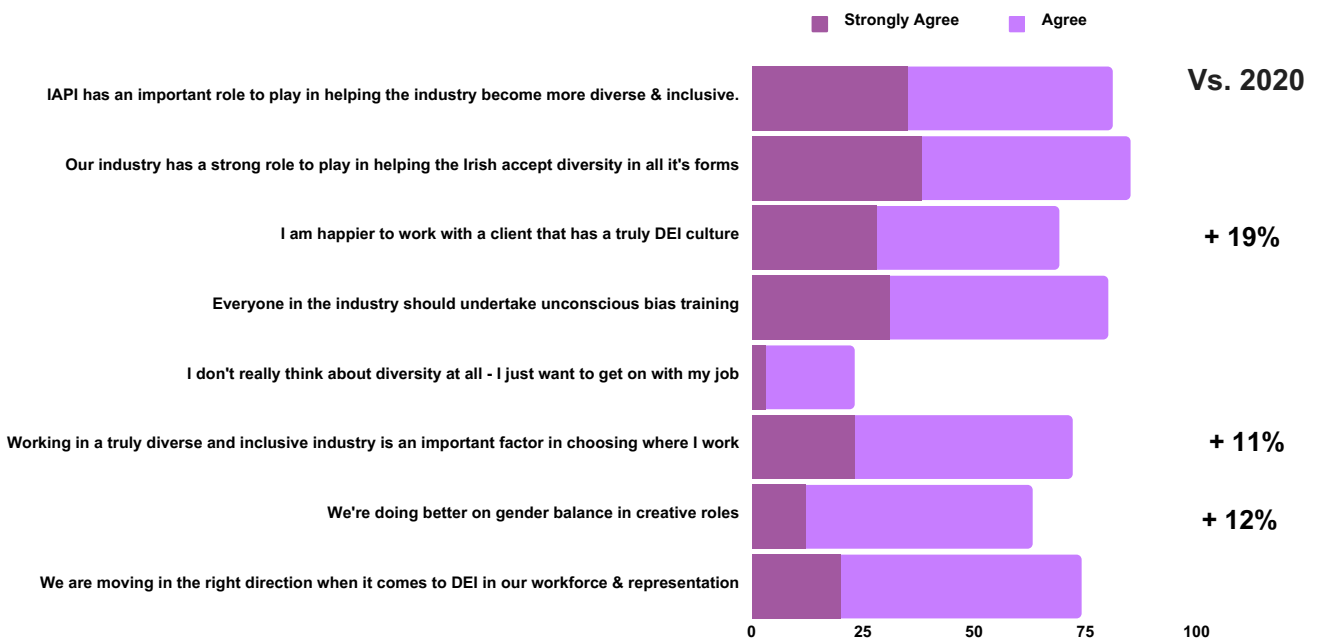
Compared to the previous IAPI Sentiment Survey in 2020, the DEI scores for the industry have improved by 12%. However, only 60% of those in junior roles agree with this compared to the average of 74%.

Also significant is that those happier to work for a client with a real DEI culture has increased by 19%.

Those believing that working in a diverse industry is important has also increased by 11% to on average, 72%. Although only 58% of Mid Managers agree with this statement, and over 30% of this cohort don't really think about diversity at all.

What is encouraging is that gender balance is doing better in creative roles within the industry, with 63% of participants agreeing with this statement.

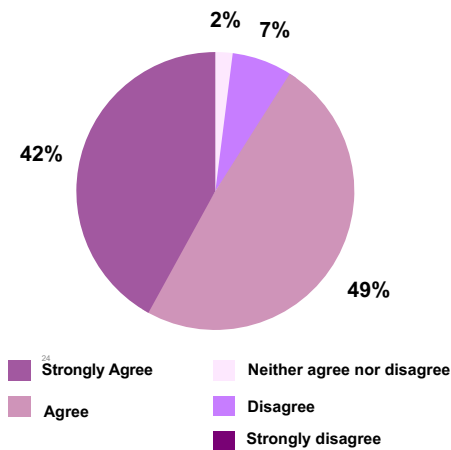
Of importance is that 85% of respondents believe the industry has an important role to play in helping the Irish accept diversity in all its forms.



Views on Sustainability

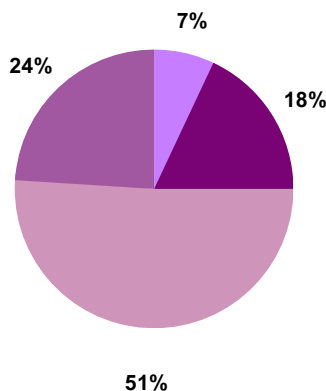
The Industry's Role

91% believe our industry has an important role in changing consumer behaviour which is one of the highest scores within the whole survey.



Furthermore, 86% believe that we need to know more about sustainability and how we can help our clients uphold these values, 76% believe every agency should have a sustainability brand champion.

WE NEED TO BECOME BETTER EDUCATED ON WHAT AGENCIES & CLIENTS CAN DO TO IMPACT SUSTAINABILITY



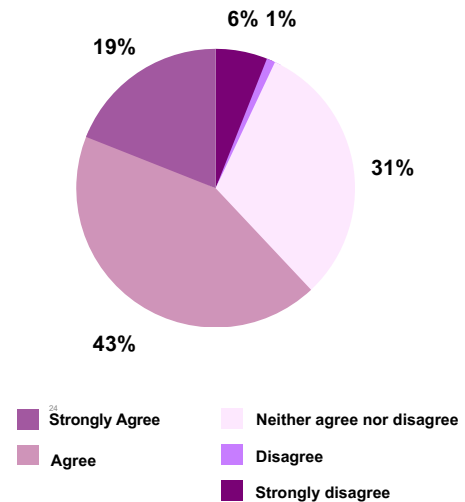
75% agree their agency is committing to sustainable initiatives.

Only 44% believe that clients are committing to sustainable behaviours.

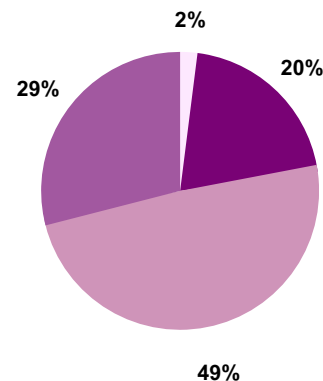
Ad Net Zero

Overall there is positive engagement with sustainability. 62% believe that Ad Net Zero Ireland will make a difference. 60% of people want to work in an agency that is sustainable and promotes sustainability. 75% want to work with clients who support sustainability. Only 19% don't agree with it being part of their job.

AD NET ZERO WILL MAKE A DIFFERENCE TO CARBON FOOTPRINT



IAPI HAS AN IMPORTANT ROLE TO PLAY TO REDUCE CARBON EMISSIONS THROUGH AD NET ZERO



78% believe IAPI has a strong role to play in promoting involvement and adherence with Ad Net Zero

A close-up photograph of a branch of cherry blossoms. The flowers are a soft pink color with yellow centers, and some buds are still closed. The background is a clear, light blue sky. The text "IAPI Initiatives" is overlaid in the center of the image.

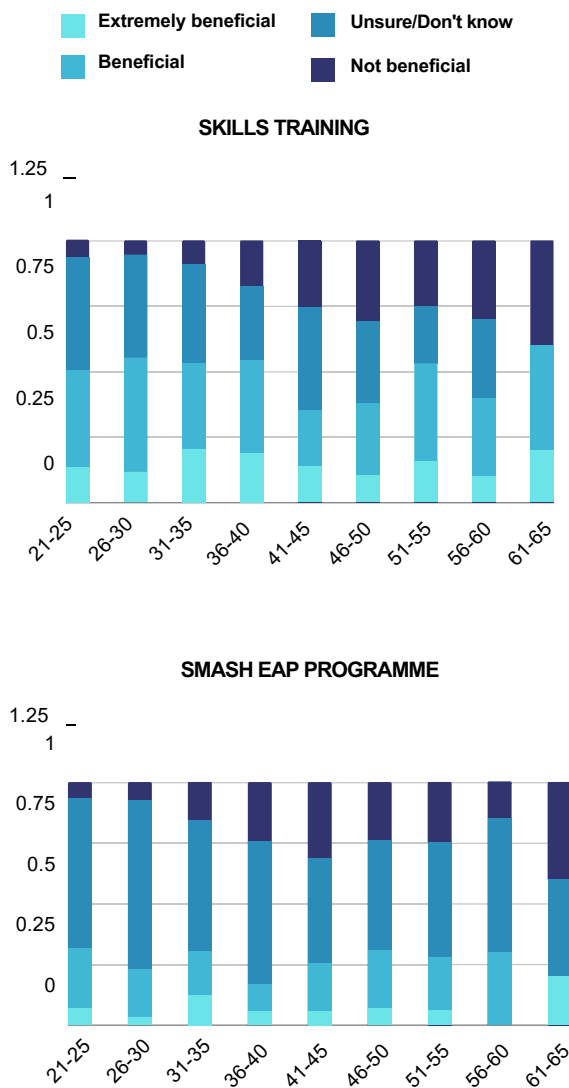
IAPI Initiatives

IAPI Initiatives

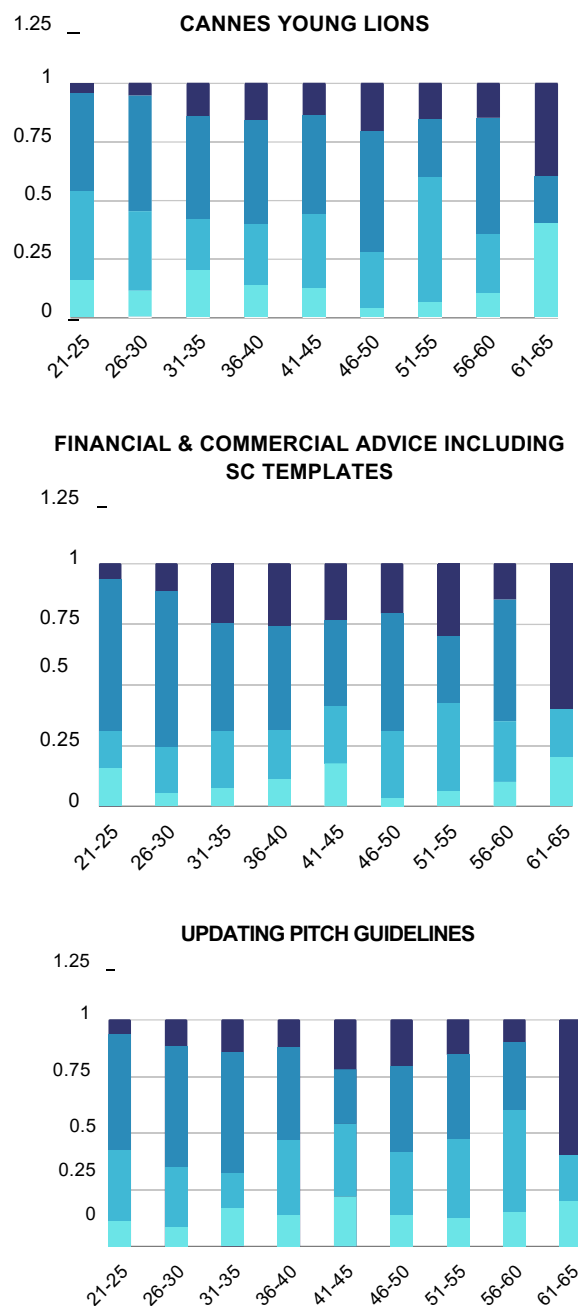
IAPI Initiatives

Of the IAPI initiatives reviewed, Cannes Young Lions proved to be the strongest in terms of benefits closely followed by skills training and events featuring specialists as being distinctively beneficial.

The detailed charts below indicate the percentages across the age groups and what in their views are the most beneficial IAPI initiatives.



Unsurprisingly, the majority of 21-30 year olds find the Cannes Young Lions initiative to be extremely beneficial or beneficial. However, it is quite interesting that the majority of 46-50 and 55-60 year olds disagree, saying they don't find this initiative beneficial.





IAPI Spring 2023 Sentiment Survey