Marketing Pulse March 2025

March 2025

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Content

Objective & Methodology

RED C carried out this research on behalf of Core Optimisation and the Business Post

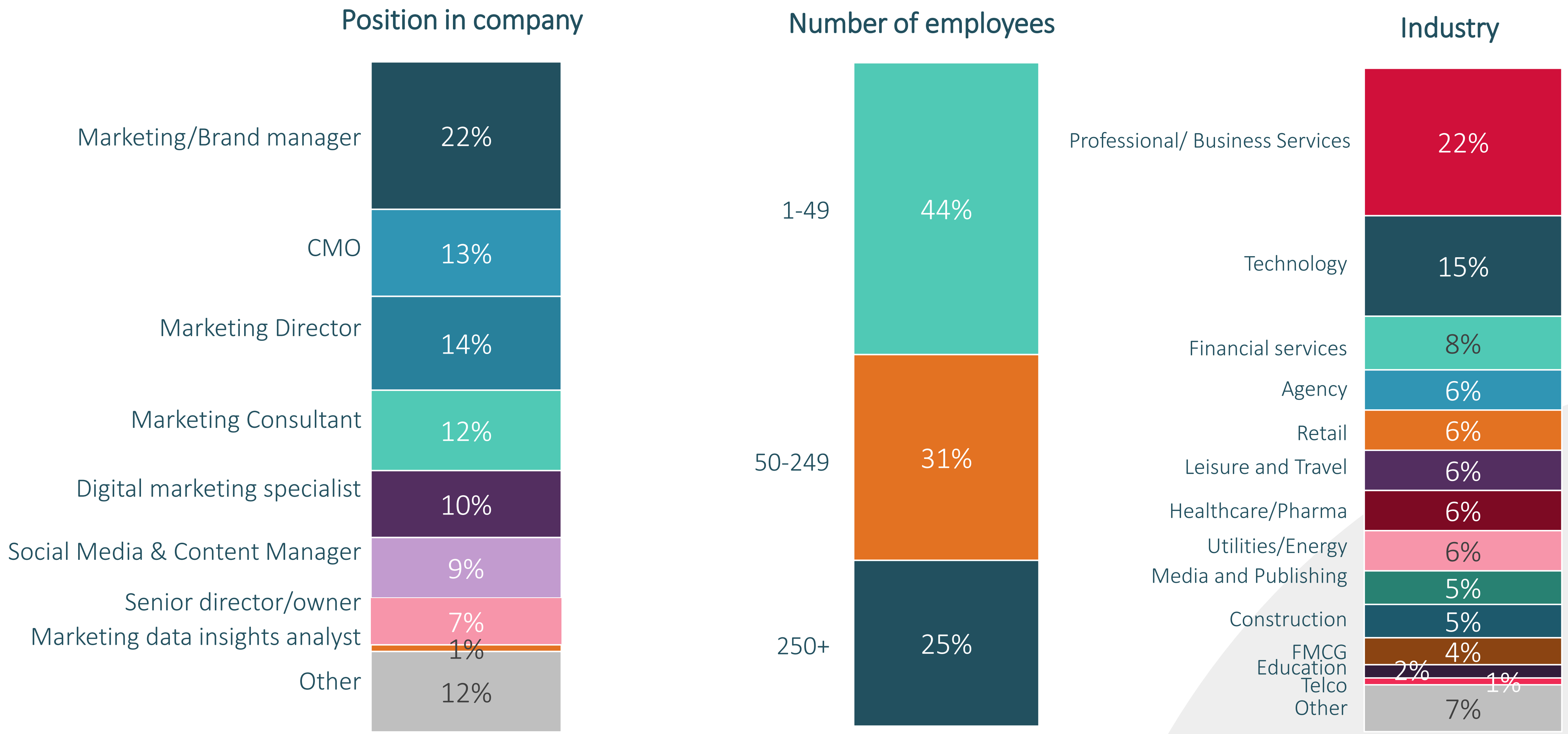
- The objective was to carry out research among marketeers in Ireland in order to ascertain their behaviours and views around:
  - The future of their business
  - Confidence in the Irish economy
  - Top areas of spend, budget expectations, and business priorities
  - Services carried out in-house vs by external agencies
  - Plans to expand internationally in 2025
  - Awareness of and plans surrounding EAA compliance

It is intended for this to be a resource for all Irish marketers and businesses

- 125 senior Irish marketers took part in the research
- Fieldwork was conducted between 23rd January and 26th February 2025
- This is the third wave of research. The first wave was conducted in June 2024, and the second in October 2024, and comparisons are made throughout where relevant.
- Key findings and results are to be published in the Business Post, and also made available as a resource for marketeers and businesses in Ireland

Sample Profile

The survey covered a good cross representation of levels, companies and industry



(Base: All respondents, n=125)

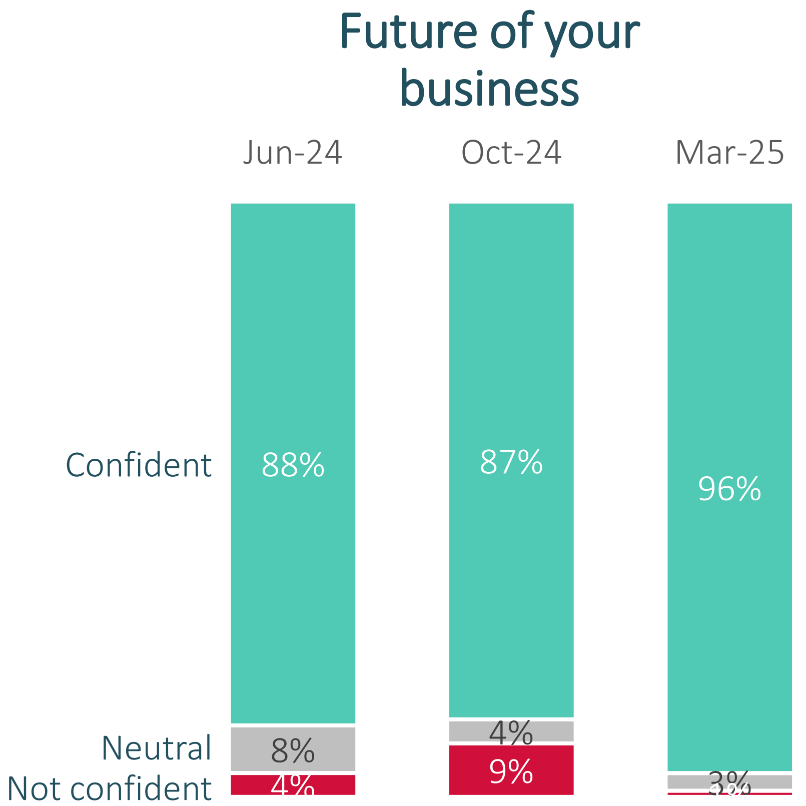
1

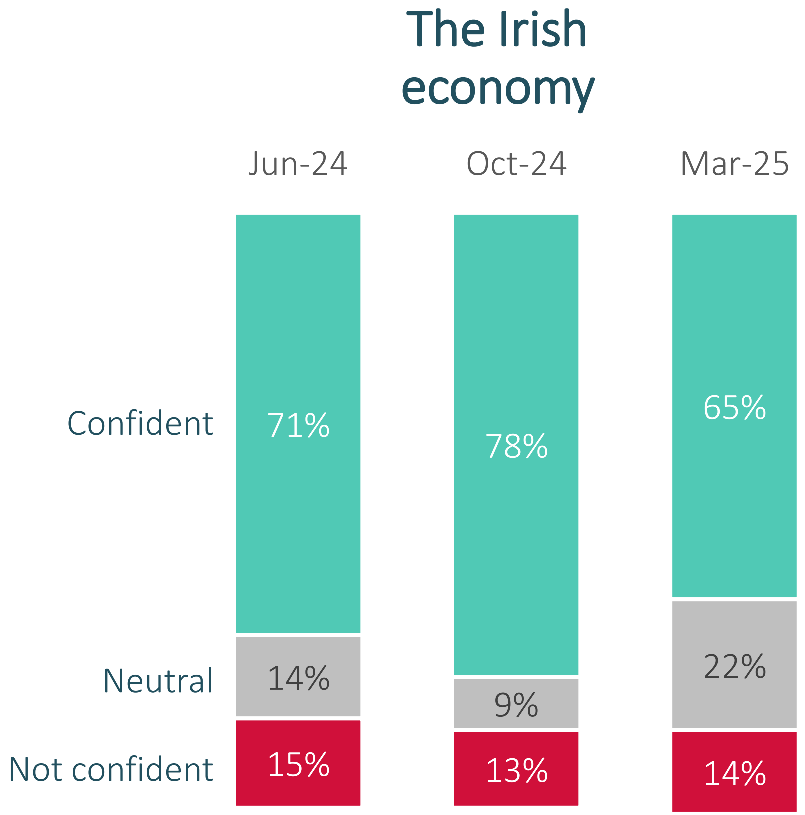
Confidence in future of your business and in the Irish economy

Marketeers confident in future of their own businesses

Marketeers have become more confident in their own business over the past six months. This is despite growing uncertainty in the future of the Irish economy, although most remain confident in this too.

Confidence in the future of your business and in the Irish economy





NET Confident	COMPANY SIZE		
	1-49	50-249	250+
Own business	96%	97%	94%
Irish Economy	65%	72%	55%

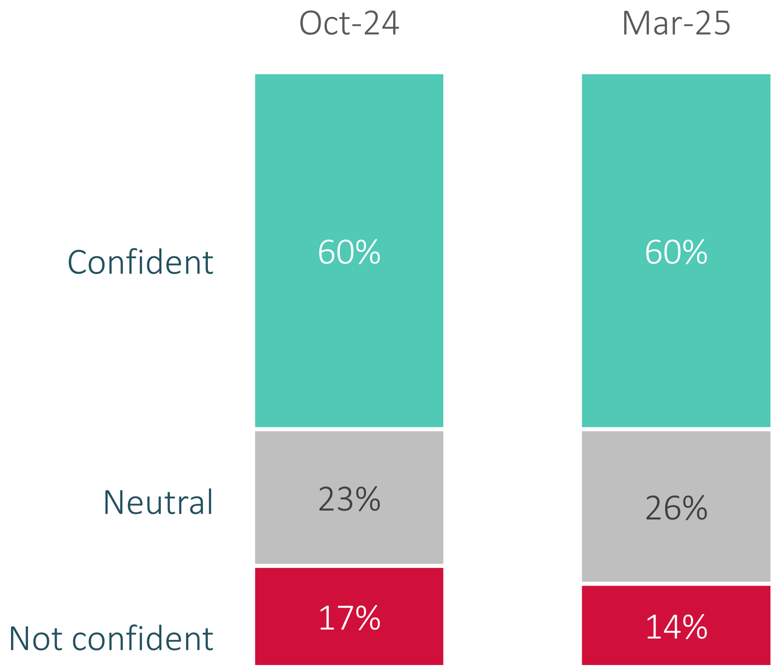
Q4 How confident do you feel about the future of your business?
Q5 How confident do you feel about the economy in Ireland over the next 12 months?

(Base: All respondents, n=125)

Most marketeers believe that consumers are feeling confident

With no change in the past six months, 3 in 5 marketeers believe that Irish consumers have confidence in the future of the Irish economy

Perceived confidence of consumers in the Irish economy



	COMPANY SIZE		
	1-49	50-249	250+
NET Confident	55%	72%	55%

Q23. Using the scale below, please tell us how confident you imagine consumers are in the Irish economy, as we head into the peak period for retailers?

(Base: All respondents, n=125)

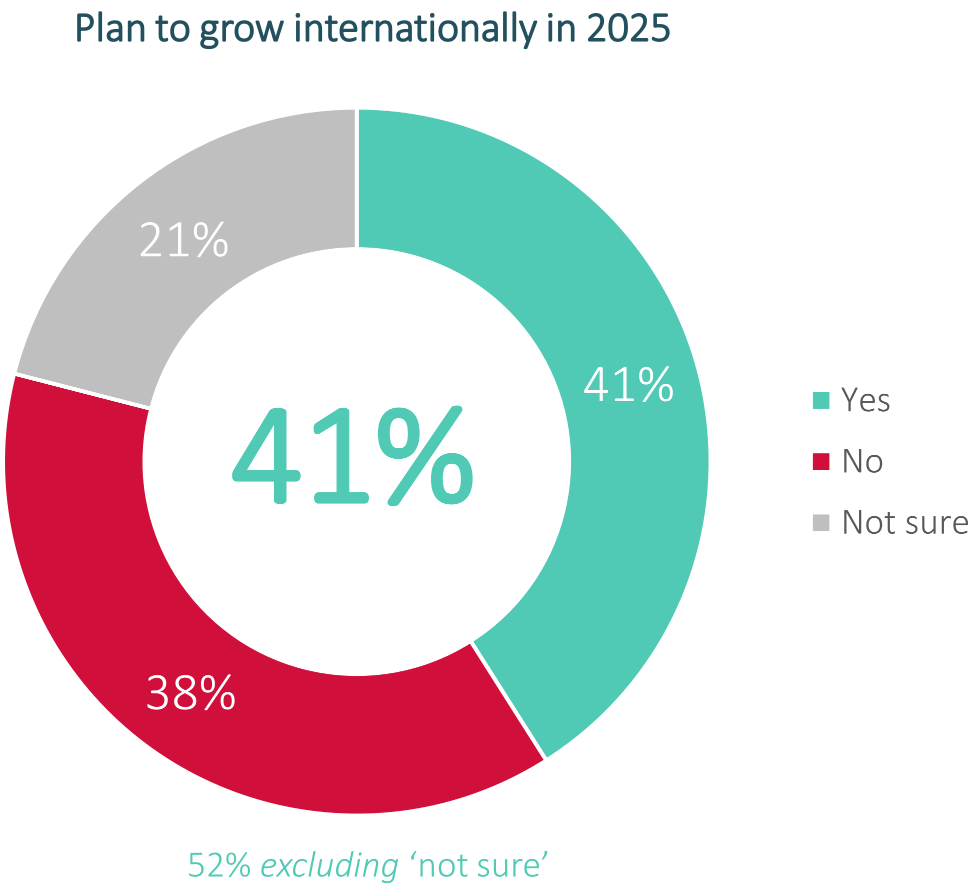
2

Focus on overseas expansion and EAA compliance

2 in 5 Irish businesses plan to grow internationally in 2025

Excluding those who are uncertain, over half of businesses plan to grow internationally this year. Smaller firms are more likely to plan to grow internationally in 2025.

Whether companies plan to grow internationally this year



Company size		
1-49	50-250	250+
51%	26%	32%

Q.29 Does your company plan to grow or expand internationally this year?

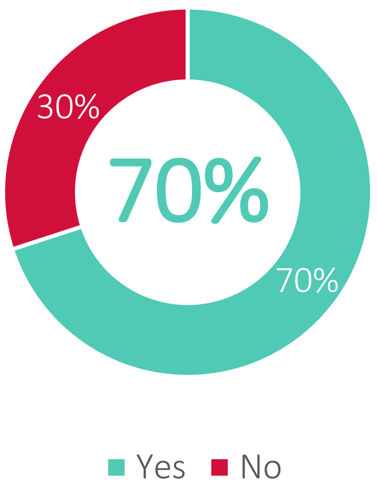
(Base: All respondents, n=125)

7 in 10 are aware that state supports are available

While awareness in state supports is high, more believe that these supports are insufficient than sufficient. Just over one third of those aware of state supports, say they have availed of them in the past.

Awareness, usage and views around state support for international expansion

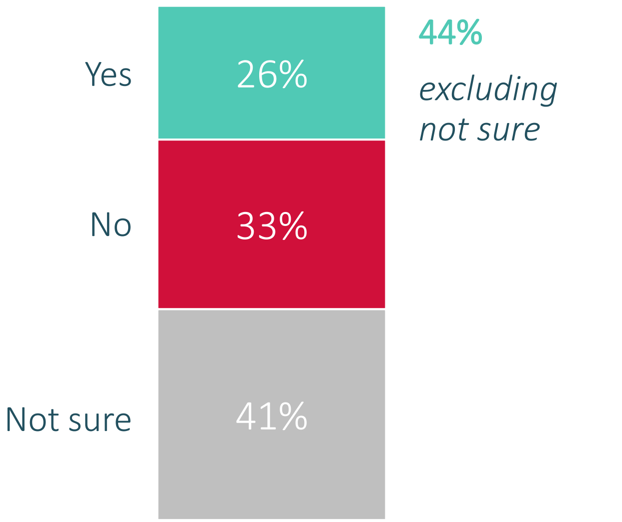
Aware that state supports are available



Company size		
1-49	50-250	250+
60%	85%	71%

Whether feel sufficient state supports are available

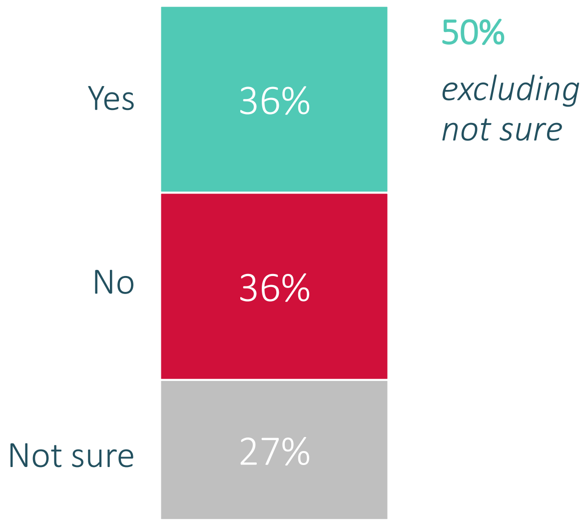
(Base: Those aware of state supports; n=88)



Company size		
1-49	50-250	250+
27%	21%	32%

Whether business ever availed of state supports before

(Base: Those aware of state supports; n=88)



Company size		
1-49	50-250	250+
27%	39%	45%

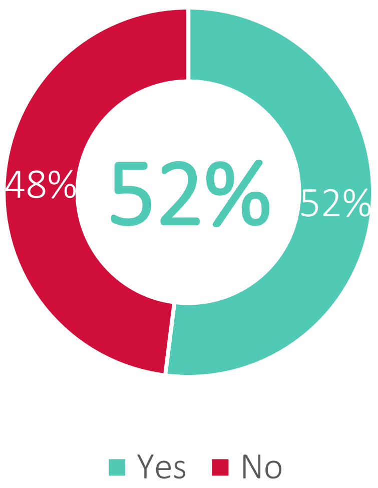
Q.30 Were you aware, before today, that state supports are available to help with international expansion?
Q.31 Do you feel that sufficient state supports are available to help with international expansion?
Q.32 Has your business ever availed of state supports in the context of international expansion?
(Base: All respondents, n=125)

Just over half are aware of the EAA

Those in medium to large firms are almost twice as likely as those in small firms to be aware of the EAA. Of those aware of the EAA, almost all were aware it may have implications for their company website.

Awareness of EAA

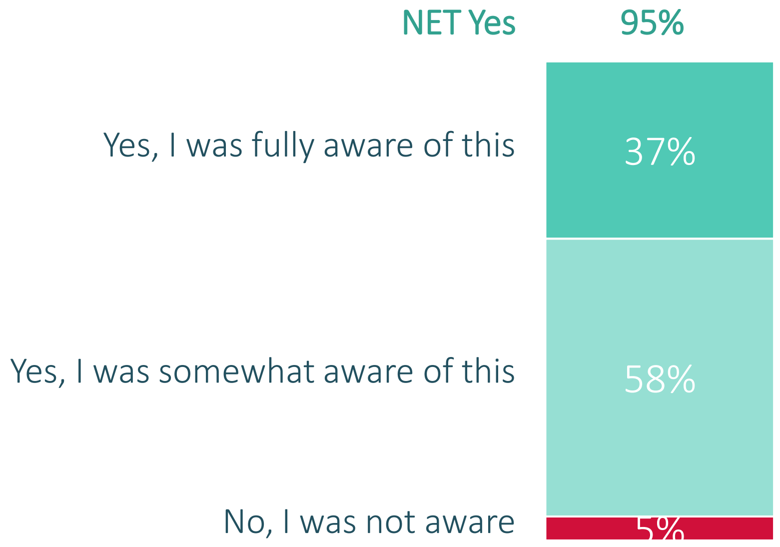
Aware of the EAA



Company size		
1-49	50-250	250+
36%	64%	65%

Aware EAA may have implications for company website

(Base: All aware of EAA, n=65)



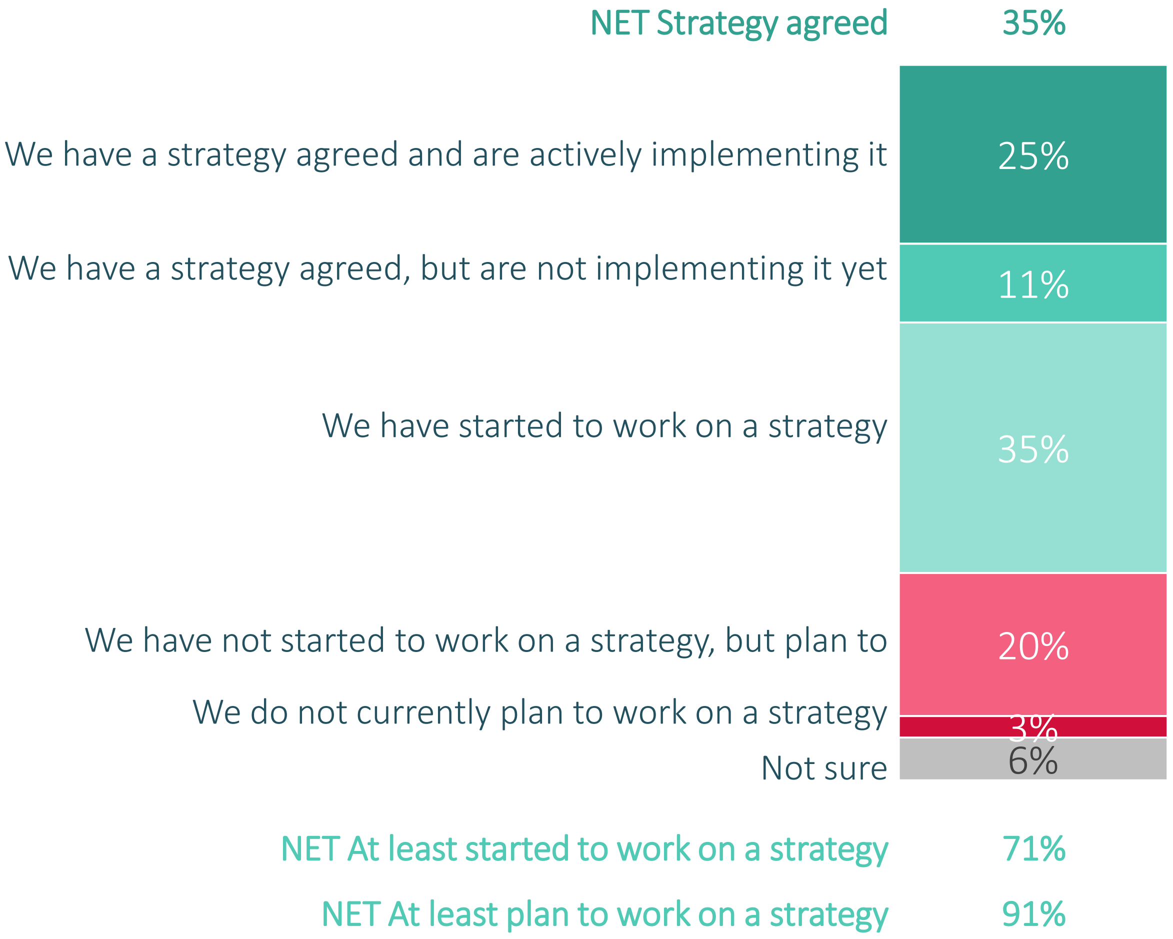
Company size		
1-49	50-250	250+
35%	24%	55%

Q.33 The European Accessibility Act (EAA), incorporating Web Content Accessibility Guidelines (WCAG) 2.1, will come into effect from 28th June 2025. Were you aware before today of the EAA?
Q.34 Were you aware before today that the EAA may have implications for your company's website(s)?
(Base: All respondents, n=125)

A third have agreed a strategy in terms of EAA compliance

While 9 in 10 at least plan to work on a strategy; and 7 in 10 have at least started to work on one; just over a third have agreed a strategy, with a quarter actively implementing one. This is highest among larger firms.

Status of company strategy on EAA compliance



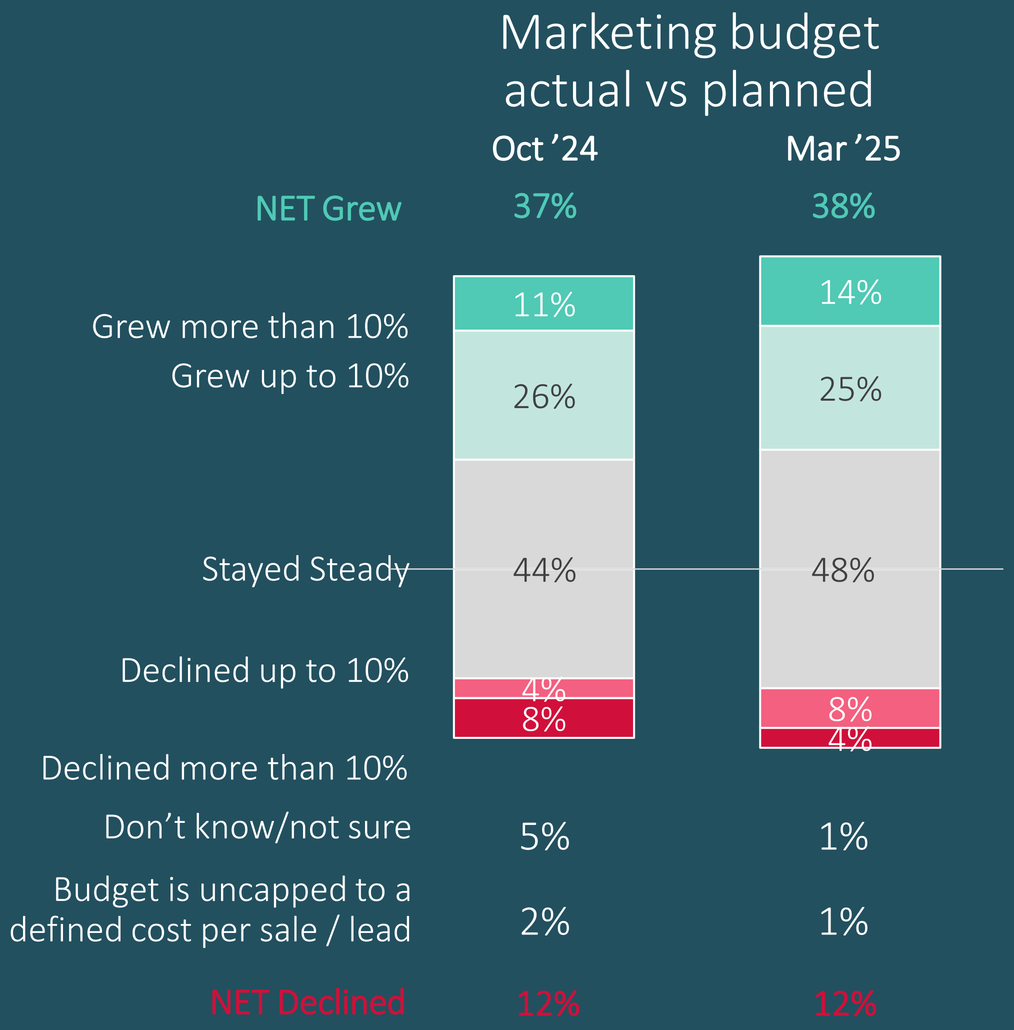
Company size		
1-49	50-250	250+
25%	28%	55%

Q.35 Which of the following best applies to your strategy, if any, regarding EAA compliance?
(Base: All aware of EAA, n=65)

3

Expectations for marketing budget and top areas of spend

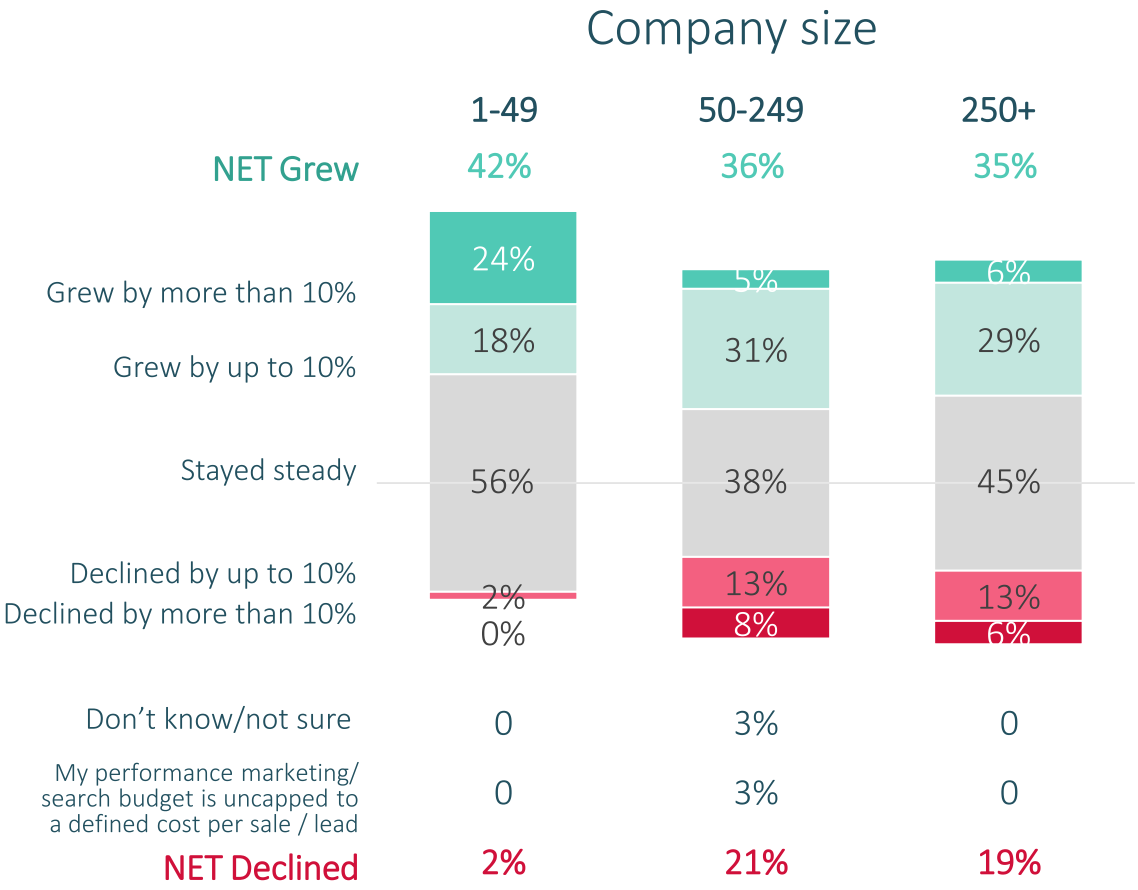
Far more say their marketing budget grew than declined



Q6 As we are now in peak period for retailers, thinking in terms of your marketing budget did you increase, decrease or stay the same as in 2023 (i.e. remain as originally budgeted)?

(Base: All respondents, n=112)

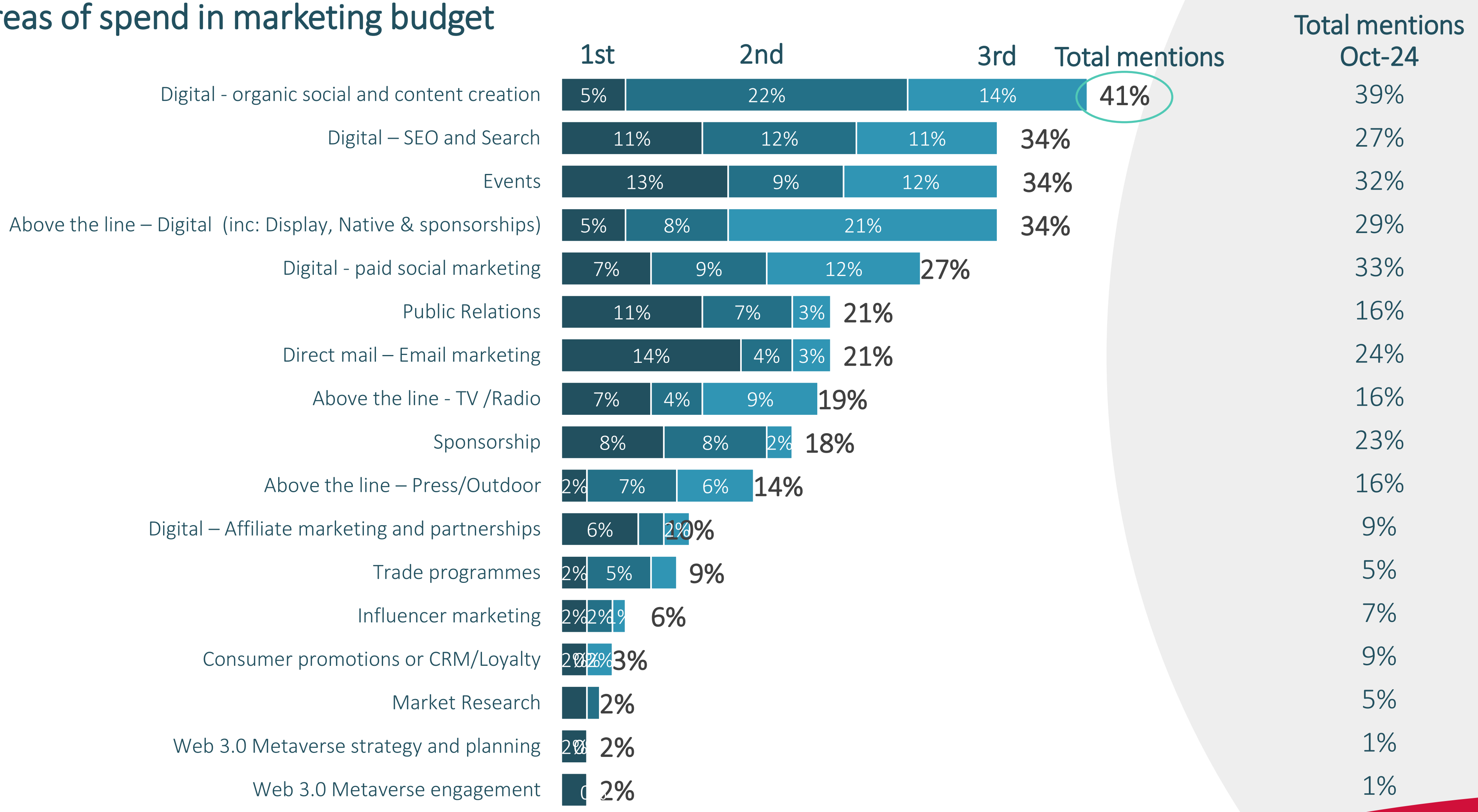
Smaller firms were more likely to say their budget grew or stayed the same between 2023 and 2024



Digital organic social/content creation remains top area of spend

Digital (SEO/Search); Events; and Above the Line (Digital) also rank highly in terms of top areas of spend

Top areas of spend in marketing budget



Q7 Which are the top 3 areas of spend for your marketing budgets from this list?

(Base: All respondents, n=112)

Spend on organic social/content lower among medium firms

Medium sized firms are also more likely to select above the line (TV/Radio) as a top area of spend

Top areas of spend in marketing budget X company size
(NET top 3 areas of spend)

	Company Size			
NET Top Three Areas of Spend	TOTAL (n=125)	1-49 (n=55)	50-249 (n=39)	NET 250+ (n=13)
Digital - organic social and content creation	41%	56%	23%	35%
Digital – SEO and Search	34%	33%	31%	42%
Events	34%	31%	38%	35%
Above the line – Digital (inc: Display, Native & sponsorships)	34%	27%	36%	42%
Digital - paid social marketing	27%	33%	21%	26%
Public Relations	21%	27%	18%	13%
Direct mail – Email marketing	21%	29%	13%	16%
Above the line - TV/Radio	19%	13%	36%	10%
Sponsorship	18%	11%	23%	26%
Above the line – Press/Outdoor	14%	16%	15%	10%
Digital – Affiliate marketing and partnerships	10%	5%	15%	10%
Trade programmes	9%	2%	13%	16%
Influencer marketing	6%	9%	3%	3%
Digital - organic social and content creation	41%	56%	23%	35%

Sig higher/lower than total

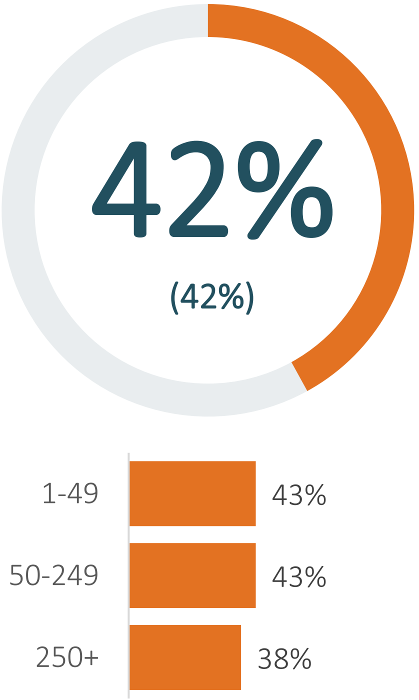
Q7 Which are the top 3 areas of spend for your marketing budgets from this list?

(Base: All respondents, n=125)

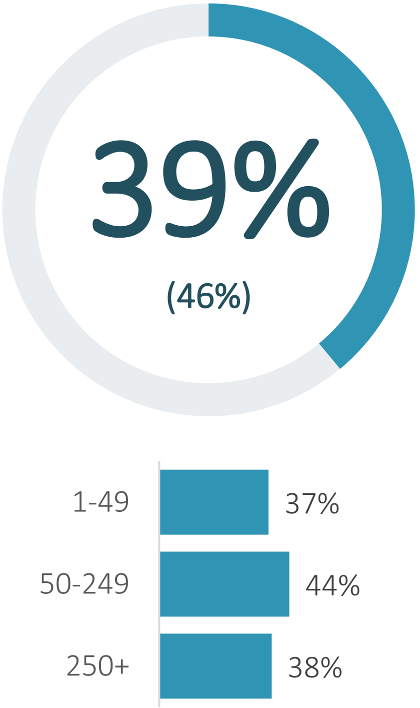
Proportion spent on performance marketing down slightly

Proportion of budget spent on…

Brand building



Performance marketing/lead generation/ecommerce



( ) = Figures in brackets relate to Oct-24

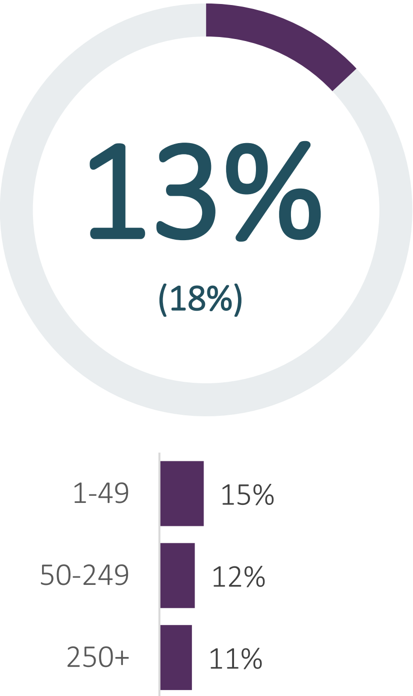
Q12 What proportion of your budget would you say is allocated to?

(Base: All respondents, n=125)

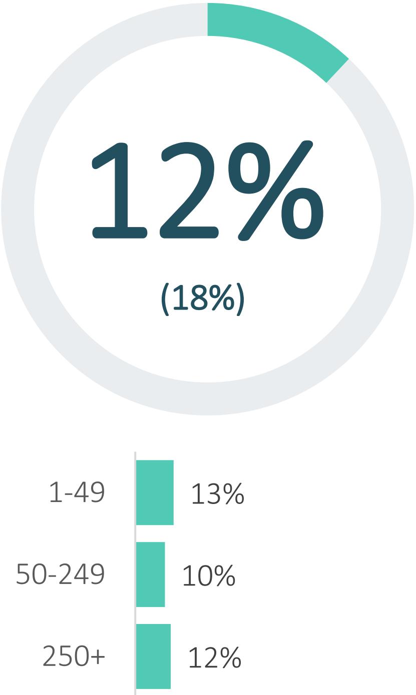
Lower spend on both ESG activities and inclusivity/diversity

Other areas of budget spend…

ESG Activities



Inclusivity/Diversity



( ) = Figures in brackets relate to Oct-24

Q13 What proportion of your budget would you say is allocated to?

(Base: All respondents, n=125)

4

Future Priorities

Understanding customer behaviour remains a top priority

Over 2 in 5 continue to rank understanding customer behaviour withing their top three priorities. Improving team skills has increased in perceived importance since October.

Top five priorities for marketing teams in next 12 months (Based on NET top three priority)

Understanding customer behaviour	Hiring skilled talent	Improving team skills	Demonstrating marketing's return on investment	Reducing costs
42%	35%	34%	29%	27%
(42%)	(35%)	(22%)	(34%)	(27%)

( ) = Figures in brackets relate to Oct-24

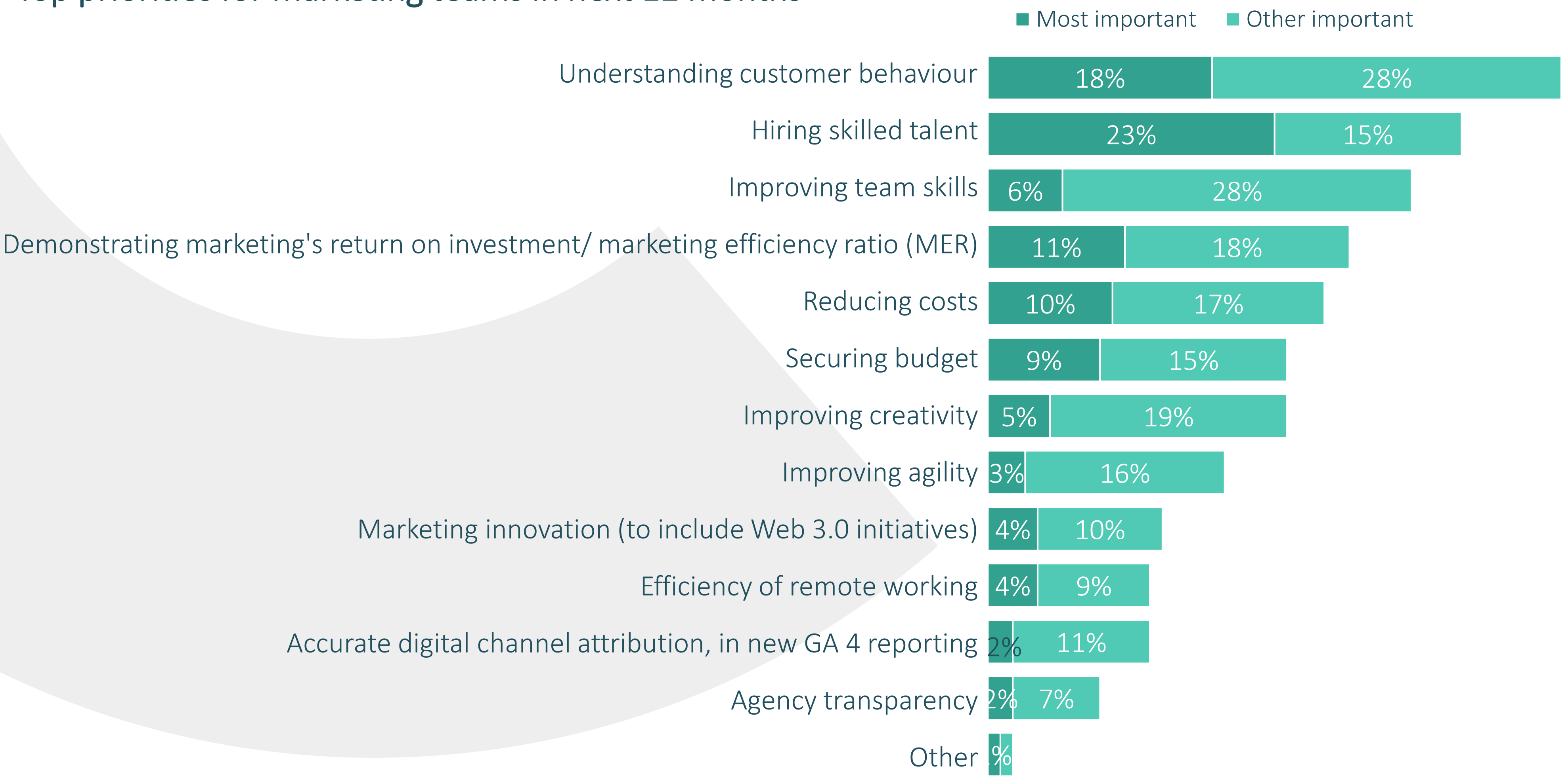
Q16 Which of the following are the most important for your business in the 12 months ahead?
Q16b Which of the following are also important for your business in the 12 months ahead?

(Base: All respondents, n=125)

Hiring skilled talent and improving team skills also high priorities

Securing budget has dropped in perceived importance in the past six months

Top priorities for marketing teams in next 12 months



	Any important Mar 25	Any important Oct 24
Understanding customer behaviour	46%	42%
Hiring skilled talent	38%	35%
Improving team skills	34%	22%
Demonstrating marketing's return on investment/ marketing efficiency ratio (MER)	29%	34%
Reducing costs	27%	27%
Securing budget	24%	35%
Improving creativity	24%	22%
Improving agility	19%	21%
Marketing innovation (to include Web 3.0 initiatives)	14%	17%
Efficiency of remote working	13%	10%
Accurate digital channel attribution, in new GA 4 reporting	13%	7%
Agency transparency	9%	7%
Other	2%	3%

Q16 Which of the following are the most important for your business in the 12 months ahead?
Q16b Which of the following are also important for your business in the 12 months ahead?

(Base: All respondents, n=125)

Larger firms less likely to cite improving creativity as a priority

Top priorities for marketing teams in next 12 months (NET Top Three Priority)

		Company Size		
	TOTAL	1-49	50-249	NET 250+
	(n=125)	(n=55)	(n=39)	(n=31)
Understanding customer behaviour	**46%**	40%	54%	48%
Hiring skilled talent	**38%**	36%	33%	45%
Improving team skills	**34%**	40%	33%	26%
Demonstrating marketing's return on investment/ marketing efficiency ratio (MER)	**29%**	25%	33%	29%
Reducing costs	**27%**	25%	28%	29%
Securing budget	**24%**	29%	26%	13%
Improving creativity	**24%**	31%	28%	6%
Improving agility	**19%**	16%	13%	32%
Marketing innovation (to include Web 3.0 initiatives)	**14%**	9%	10%	26%
Efficiency of remote working	**13%**	13%	10%	16%
Accurate digital channel attribution, in new GA 4 reporting	**13%**	13%	10%	16%
Agency transparency	**9%**	4%	13%	13%
Other	**2%**	4%	0	0

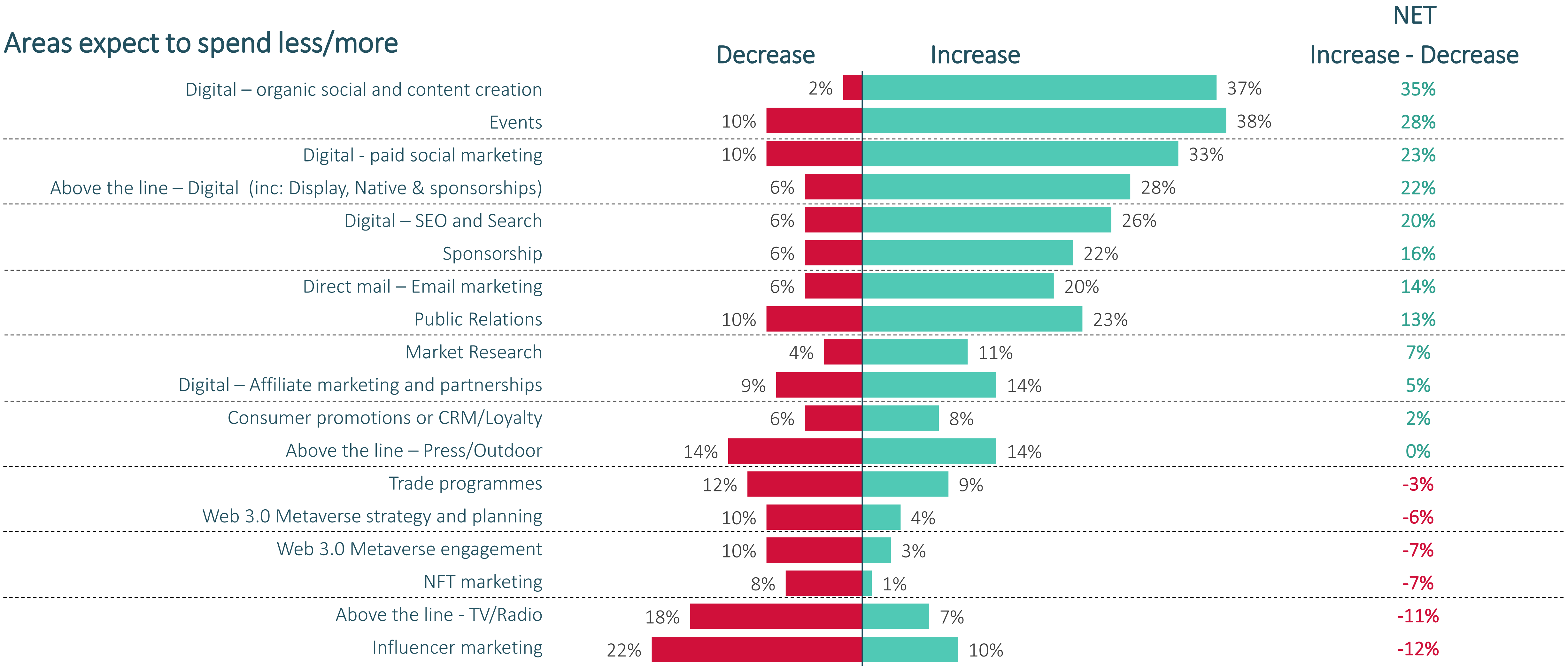
Q16 Which of the following are the most important for your business in the 12 months ahead?
Q16b Which of the following are also important for your business in the 12 months ahead?

(Base: All respondents, n=125)

Greater spend expected on digital organic social/content creation

Overall, spend is expected to increase across events; digital paid social marketing; and above the line (digital) among other areas. Spend is likely to drop on influencer marketing; and above the line (TV/Radio).

Areas expect to spend less/more



Q8 In which, if any, of these areas of marketing do you plan to invest more into over the next two years?
Q9 In which, if any, of these areas of marketing do you plan to invest less into over the next two years?

(Base: All respondents, n=125)

Notable drop in expected spend on influencer marketing

More now expect to decrease than increase spend on influencer marketing. While spend can still be expected to increase on digital SEO/Search; and Public Relations; this expectation is down relative to October.

Areas expect to spend less/more

	NET Increase – Decrease (Mar-25)	Oct-24	Jun-24
Digital – organic social and content creation	35%	29%	31%
Events	28%	24%	22%
Digital - paid social marketing	23%	21%	35%
Above the line – Digital (inc: Display, Native & sponsorships)	22%	25%	33%
Digital – SEO and Search	20%	27%	29%
Sponsorship	16%	15%	32%
Direct mail – Email marketing	14%	10%	-2%
Public Relations	13%	20%	20%
Market Research	7%	15%	24%
Digital – Affiliate marketing and partnerships	5%	18%	-4%
Consumer promotions or CRM/Loyalty	2%	3%	1%
Above the line – Press/Outdoor	0%	-12%	-9%
Trade programmes	-3%	5%	-7%
Web 3.0 Metaverse strategy and planning	-6%	3%	-3%
Web 3.0 Metaverse engagement	-7%	2%	-1%
NFT marketing	-7%	-6%	n/a
Above the line - TV /Radio	-11%	-15%	8%
Influencer marketing	-12%	3%	1%

Q8 In which, if any, of these areas of marketing do you plan to invest more into over the next two years?
Q9 In which, if any, of these areas of marketing do you plan to invest less into over the next two years?

(Base: All respondents, n=125)

5

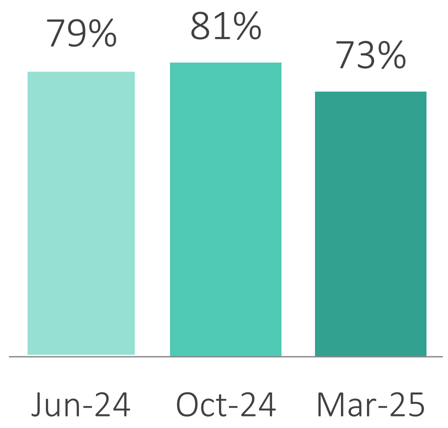
In-house vs external services

Decline in proportion who conduct any marketing in-house

Just under three quarters conduct any marketing in-house, with the most popular categories to conduct in-house being copywriting; social media/search optimisation; and creative development

Proportion of marketing conducted in house vs. with external agencies

% who conduct any marketing in-house

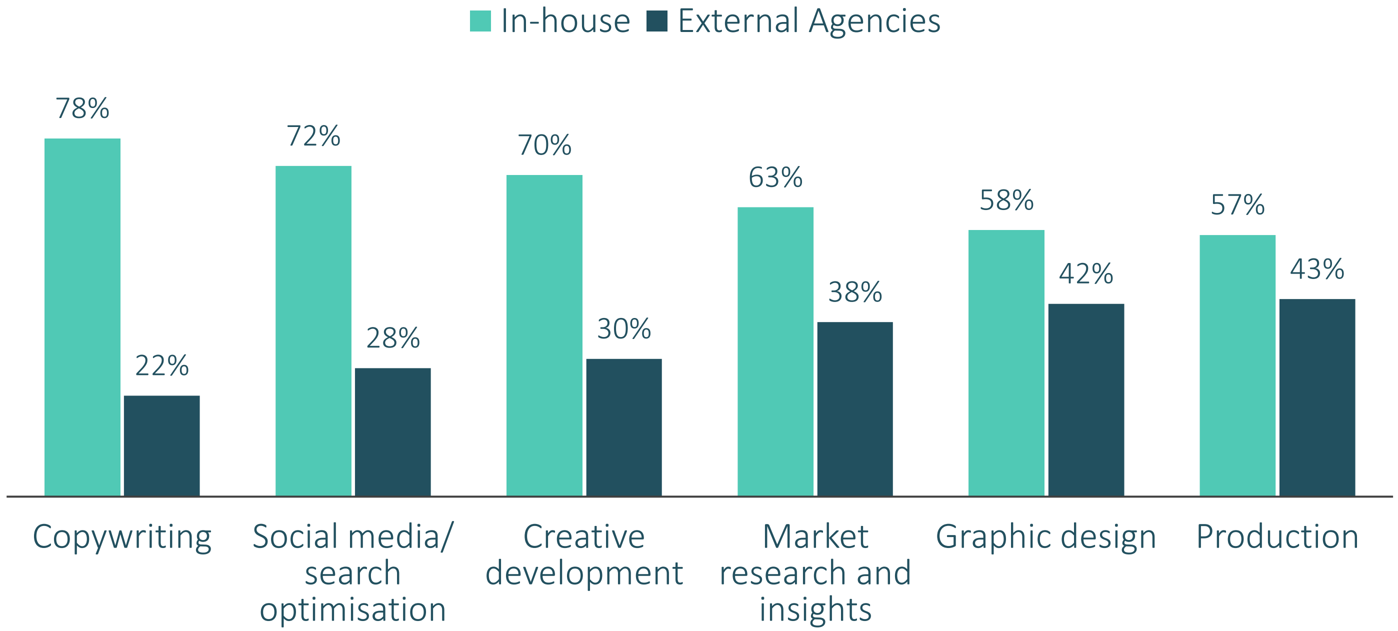


COMPANY SIZE

	1-49	50-250	250+
Yes	78%	64%	74%

% ratio spend on key areas in-house vs external

Among those who conduct any marketing in-house



Q10 Do you conduct any of your marketing in house, as opposed to with external advertising, brand or production agencies?
Q11 What proportion of the following areas of marketing in your business is conducted with external agencies vs. in house?

(Base: Q10 - All respondents, n=125; Q11 – All who conduct any marketing in-house, n=91)

6

Key findings

Key Findings

1

Despite uncertain times economically, Irish businesses are planning to grow internationally in 2025. Overall, 2 in 5 say they plan to grow in 2025, rising to over half when excluding the undecided. Small businesses are particularly likely to plan for growth in the coming year.

2

Irish businesses are generally aware of state supports for international growth, but are not entirely convinced that current supports go far enough. Of the 7 in 10 who are aware that supports exist, a third say they are insufficient, with 2 in 5 saying they're not sure.

3

Over a third of businesses say they have definitely availed of state supports in the past. When excluding those who are not sure, half have availed previously, while half have not. Larger companies are more likely to have done so, despite being no more aware that the supports exist.

4

Over half of businesses are aware of the EAA, although this is lower among smaller firms. Of those aware, almost all are aware that it may have implications for their website. However, only a third say they are fully aware of this, with this figure higher among larger firms.

5

While almost all firms at least plan to work on a strategy regarding EAA compliance, and 7 in 10 have at least started to work on a strategy, only a third have agreed a strategy, and only a quarter are actively implementing one. Larger firms are more likely to have agreed a strategy already.

6

Irish marketeers remain confident in the future. Over 9 in 10 are confident in the future of their business (up on 2024); two thirds are confident in the Irish economy (down on 2024); and 3 in 5 believe Irish consumers are confident in the economy (steady on 2024). Confidence is highest among medium sized firms.

7

Most businesses say their marketing budget either increased or stayed the same between 2023 and 2024. Looking ahead to 2025, higher spend is expected across many areas, most notably digital organic social/content; events; and digital paid social marketing. Lower spend is expected on influencer marketing, having declined steeply in the last six months.

8

The top priority areas for marketing teams in the coming year are understanding customer behaviour; hiring skilled talent; and improving team skills.

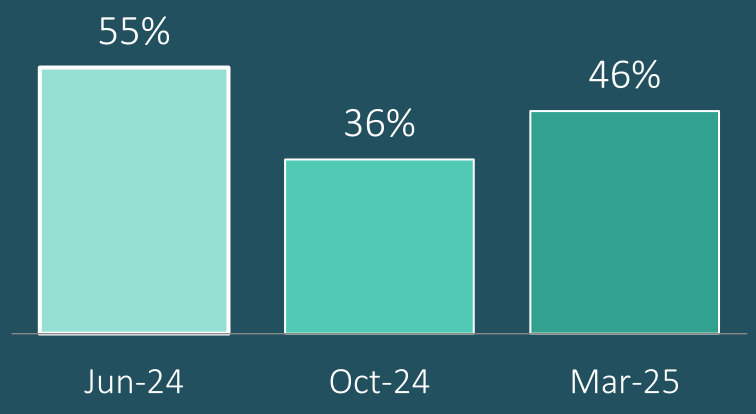
7

Appendix

Just under half say they have a strategy, back up on October

Medium sized firms are most likely to have a 1st party data acquisition strategy, while smaller firms are the least

% have a 1st party data acquisition strategy



	COMPANY SIZE		
	1-49	50-250	250+
Yes	35%	62%	48%

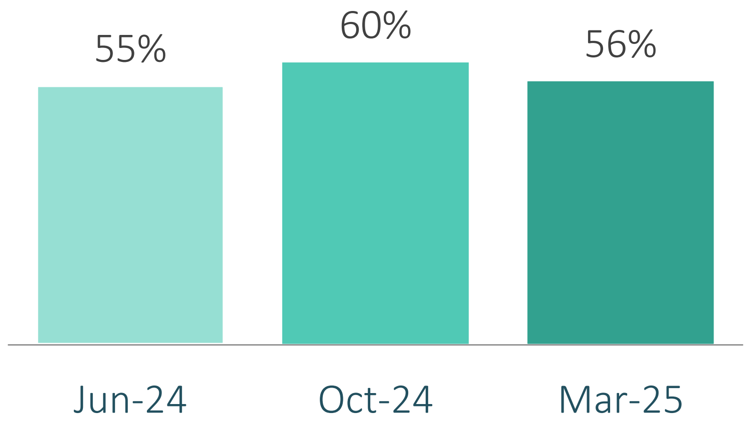
Q.14 Does your company have a 1st party data acquisition strategy?

(Base: All respondents, n=125)

Almost 3 in 5 say existing agency meets BAU needs

Larger firms are more likely to say their existing agency is meeting their BAU needs

% whose existing agency is meeting BAU needs



	COMPANY SIZE		
	1-49	50-250	250+
Yes	49%	51%	74%

Q.15 Are your existing agency partners meeting all of your BAU and digital marketing transformational needs?

RESEARCH
EVALUATION
DIRECTION
CLARITY

See More, Clearly

REDC