

Phase One Deliverable:

- IDI Debrief
- Personas [draft]
- Addressable Market.

Debrief Agenda

1. Topline Summary
2. Challenges & Pain Points
3. Intro Personas
4. The Market/Competition
5. Current perceptions: Empathy, FutaVista & Unknown
6. Market Prioritisation Recommendations
7. Value Proposition feedback. Thoughts on future
8. Technology mapping/AI
9. Expert check list
10. Strategic Recommendations & Next steps
11. Appendix.

IDIs Info:

Target customer interviews/experts x 17 were conducted in March 2026 Each interview lasted 45-60 mins and focused on an approved discussion guide.

- Ireland interviewees' were insight/innovation professionals
- UK interviewees were industry experts/key opinion leaders
- Some participants didn't complete tables
- Findings anonymised.

Analysis was supported by tools & AI :[Otter.ai](#),[zoom.com/](#), [Perplexity.ai](#) & [claude.ai](#). Open source research has supplemented this document.

Topline Summary

An industry at an inflection point cross market. AI, convergence, consolidation, downward pressure on hiring, slower business growth, demand for research to be a strategic capability that drives decisions. It is a structural shift.

Both markets are wrestling with the same fundamental challenge: how to move insight from a support function into the heart of business decision-making. This is not primarily a technology problem. It is a capability, culture, and delivery problem.

Ireland is a small, relationship-driven market where agency selection runs on trust, chemistry, and personal credibility. Cost sensitivity is low — premium agencies are accepted when the relationship justifies the investment. Irish buyers are *strategically ambitious* (scoring highest on embedding insight & future-proofing) but *operationally cautious* on technology adoption, particularly AI. This creates a market that rewards consultative depth over technological disruption.

Key convergence: Both markets rate embedding insight into the business as a top challenge. Both identify foresight and innovation as high priorities. Both see AI as simultaneously an opportunity and a threat. And both consistently advise Unknown to sharpen its proposition, build visibility, and lead with specialist agency brands rather than the parent.

Key divergence: Ireland rewards relationships and strategic partnership; the UK demands commercial evidence and procurement-ready credentials. The UK is under intense budget pressure. Headcount growth is in reverse. Irish interviewees were broadly constructive about the propositions; UK interviewees pushed harder on differentiation and commercial language.

The best agency performers have a clear & intentional AI strategy. proprietary technology, speed, hybrid human-tech model, outcome-oriented delivery, diversified revenue.

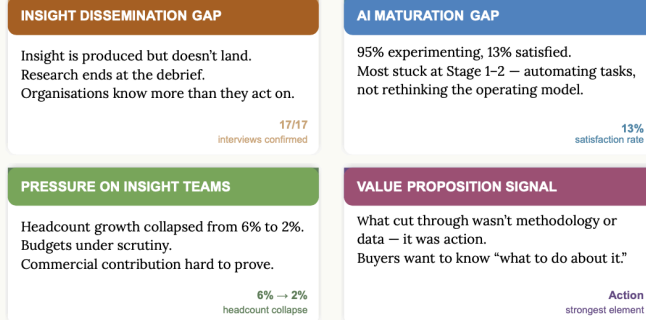
The poorer agency performers in contrast are service-led without technology differentiation, lack AI strategy, fail to deliver value, unable to differentiate themselves sufficiently from low cost alternatives. And crucially are not outcome focussed.

See appendix one for more detail.

There is a difference in **sentiment** across both interviews. Ireland: 59% versus UK: 47% positive overall. Irish interviewees were warm & encouraging towards the business. UK interviewees were anxious and mostly offered a reality check on expansion.

[Sentiment classification based on editorial judgement across all 17 interviews, not automated analysis. With small sample sizes % are directional indicators of tone, not statistical measures].

Four converging pressures point to one strategic opportunity



Key Challenges & Pain Points

Challenge	IRE	UK	Gap	Combined
Improving speed, scale & agility	8	9	+1 UK	8
Foresight, futures strategy & scenario planning	8	8	=	8
Innovation pipeline & horizon scanning	8	8	=	8
Embedding insight into business	8	7	-1 UK	8
Enabling research talent for storytelling	8	7	-1 UK	7
Integration of AI into analysis & debriefs	7	8	+1 UK	7
Business & brand future-proofing	8	5	-3 UK	7
Voice of customer	8	6	-2 UK	7
Finding strategic advisors with real impact	7	7	=	7
Advanced analytics for decision making	7	7	=	7
Embedding agentic AI for workflows	5	8	+3 UK	6
Metadata to reduce commissioning	5	8	+3 UK	6
Training non-researchers to interpret data	7	5	-2 UK	6
Developing foresight as org competency	7	6	-1 UK	6
Self-service research	5	6	+1 UK	5
Combining human & synthetic data	5	7	+2 UK	6
Reporting & dashboards	5	6	+1 UK	5

Survey data into martech stack	5	6	+1 UK	5
Shifting from episodic to continuous research	4	5	+1 UK	4

Both markets completed quantitative challenge surveys. Ireland (6 ext interviewees) and UK (4 external interviewees) rated 19 challenges on a 1–10 scale. The table below compares rounded averages, ranked by the combined score.

1. **Challenges x Markets:** Both markets converge on foresight, innovation, and speed as top priorities. The divergence is in technology adoption: the UK scores AI, agentic AI, and metadata challenges 2–3 points higher than Ireland, reflecting a more advanced but more anxious relationship with technology. Ireland scores higher on embedding insight (+1), future-proofing (+3), voice of customer (+2), and training non-researchers (+2) — a market focused on foundational capability building rather than technology transformation.

Ireland needs a partner who strengthens core insight capabilities. The UK needs one who navigates technology disruption with commercial confidence. A single proposition will not serve both.

2. **The Insight Dissemination Challenge:** struggle to embed insight into the wider business was the single biggest theme in Irish interviews. This isn't about producing good research, it's about getting it to travel x functions & genuinely shape commercial strategy.

Interviewees in both markets were broadly satisfied with research quality. The problem is what happens after the debrief: influence decisions beyond the commissioning team & genuinely shape commercial strategy.

One interviewee referred to this as the **“insight experience.”** A shift from traditional debriefs towards an immersive, multi-source presentation designed to create genuine engagement with data across the organisation. This is currently being driven in house not by agencies..

“There is a real focus on an insight experience - immersion in the data. It is going beyond the debrief & trying to pull in different sources & bring results to life in an immersive way”

This is compounded in the UK by ‘the triple squeeze: less time, less budget & more challenges around activation & stakeholder management.’ Another interviewee noted that “democratising insight through dashboards meant losing strategic depth.”

This challenge is consistent with industry reports [Grit Insights Practice] who identified the ‘strategic insight consultant’ as the emerging industry model.

The insight industry has a delivery problem, not a methodology problem.

3. **Cost sensitivity is a critical market differentiator:** this was a dominant theme in the UK market but it was striking how rarely cost, price, or budget pressure was raised in Irish interviews. When cost was mentioned in Ireland, it was typically in the context of acknowledging that premium agencies are expensive but worth it. No Irish interviewee described a market under significant price pressure.

In the UK, there are significant delays in project sign-off. Often procurement driven, getting budget approval & sign off, can take weeks or months. This favours agencies who are already a preferred supplier. For newer agencies it is a barrier.

Cost focus isn't just about price. Evidence that insight functions are under pressure to prove value creation.

4. **AI disruption is real and its implications are becoming clearer** — but the two markets are experiencing it at very different speeds and with very different anxieties.

AI is an efficiency game today — but it will reshape the entire operating model tomorrow.

Agency selection: dynamics diverge sharply between markets (see Topline Summary).

Empathy Research's growth model — which works well in Ireland — will not transfer to the UK without fundamental changes to the approach. UK buyers need credentials, case studies and evidence of ROI before a relationship can even begin

Ireland is where trust converts to revenue fastest.

Our target audience - Personas

1. Irish Insight Leader [CORE ICP]

PERSONA

“Aoife” — Head of Insight, Ireland



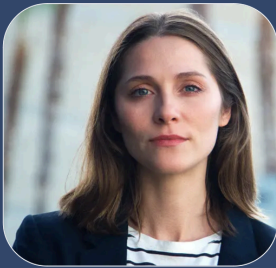
Aoife doesn't need more data — she needs more ammunition: the tools, the language, and the delivery formats to make the insight she already has impossible for her organisation to ignore.

2. **Irish Innovation Leader** [TBC on ICP prioritisation]

3. UK Insight Leader [FUTURE ICP]

PERSONA

“Charlotte” — Head of Consumer Insight, UK



Charlotte needs to prove that every pound spent on insight is driving a commercial outcome. My board doesn't care how the research was done — they care what changed because of it.

Personas built using IDIs, LinkedIn [profiles](#) & open source research.

The Market/Competition

Ireland: small market (valued at €710M), the competitive landscape is concentrated on a small number of established players. Source: IBISWorld 2026

UK: valued at £6.8bn. 13 x no. of agencies in Irish mkt. Procurement more prevalent, significantly more fragmented:

Irish competitive landscape		
Agency	Strengths	Weaknesses/Risks
Ipsos	Step above Irish agencies; global scale; strong methodology.	Premium cost; not always locally attuned.
Red C / Red Sea	Long-standing most impressive Irish operator. Richard Caldwell is well regarded.	May be perceived as traditional.
Opinions Research	Award-winning. Robust, integral. Multiple interviewees cited positively.	Very lean team (~5 people). Serious scaling concerns.
B&A	Strong public profile via political sentiment and JNRS.	Perceived as legacy. Relationship-dependent.
Jump	Highly regarded for innovation. Strong global presence.	Expensive. Can over-engineer. Sometimes slow.
Empathy Research	Those who know it rate well. Declan O'Reilly is well regarded by clients.	Low market awareness. Multiple interviewees no prior knowledge.

Domestic agencies were generally top-of-mind. Established players with legacy relationships that are challenging to unseat.

Broadly well regarded but also some commentary about their limitations -. *"storytelling & crafting a competitive, compelling narrative to secure stakeholder buy in, because it takes a significant amount of time."*

The Others:

System 1: best regarded UK agency amongst Irish interviewees. Perceived as great at what they do.

Tracksuit: no awareness amongst Irish respondents. Partnership with System One.

KubiKallo: only one person was aware. A bit scrappy.

Ones to Watch:

[Bionics](#): mentioned spontaneously & enthusiastically by two respondents.

[Bricolage](#): rated by two interviewees.

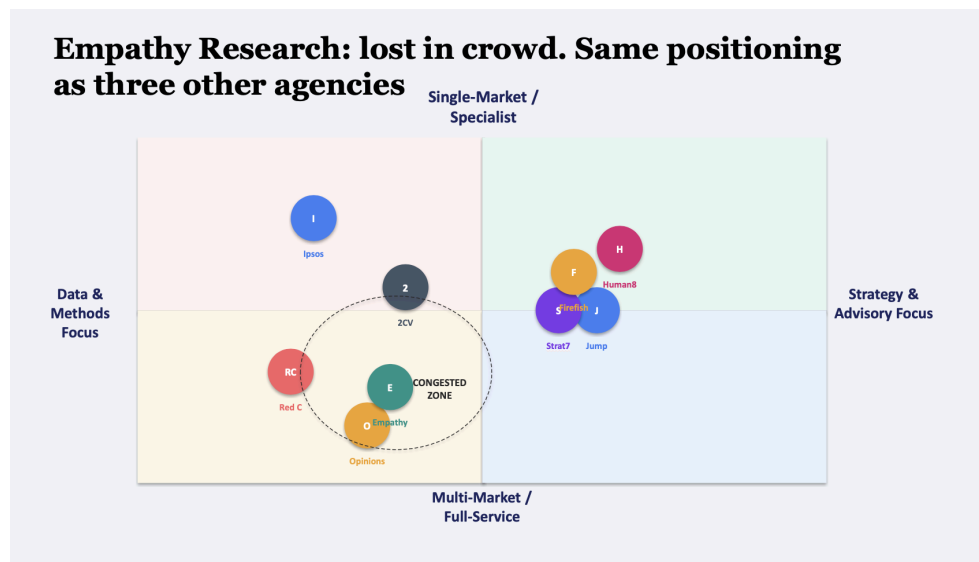
[Hallon](#): highly rated in innovation strategy.

UK Competitive Landscape

Agency / Platform	Strengths	Weaknesses / Risks
System1	Strong positioning - behavioural science & prediction. Clear niche & thought leadership. Well-known in UK & beyond	Maybe perceived as methodology-led rather than business-outcome-led. Narrow positioning could limit the addressable market.
Tracksuit	Low-cost, self-serve brand tracking. Growing rapidly, particularly among smaller brands & SMEs. Disruptive pricing model.	Basic output. Targets less insight-literate clients. Compresses traditional tracker market. Limited strategic depth. Awareness limited
Strat7	Well-regarded. Good people, focused approach. Consultative style resonates with senior buyers.	Not clearly differentiated in some interviewees' minds. Risk of being seen as a generalist.
MTM	Chosen clear space & doing well. Niche positioning in media/entertainment well understood.	Niche may limit scale. Less known outside the core sector.

Empathy Research:

1. Consistently less known & understood than any other Irish agency
2. Those who know Empathy rate them highly. Not a quality or delivery challenge. Engagement comparable to others. It's about visibility
3. Operating in a relatively crowded space. No differentiation



4. Other agencies: stronger name recognition & clearer positioning. This is an important barrier to growth in the Irish market and an urgent problem to solve. *"They need to do some marketing."*

FutaVista

1. Well regarded by those familiar with the business
2. Damien was praised as a strong strategic thinker with senior credibility. *"Damien is really, really strong on the thinking, & the quality of his work."* *"Damien is somebody who you could put in front of anybody of any senior level."*
3. Foresight proposition aligns directly with both markets' priorities (foresight & innovation both scored 8/10 in both Ireland and UK surveys).
4. Awareness of FutaVista outside existing client relationships is very limited in Ireland – & non-existent in the UK.
5. FutaVista = Damien

In Ireland, FutaVista can build from existing relationships and Damien Heary's personal credibility – the market rewards trust-based entry.

In the UK, equal demand does not mean equal accessibility: procurement barriers, the requirement for credentials and case studies, and the need for commercially grounded language means FutaVista cannot simply "sell foresight" into the UK market without first resolving the proposition issues identified in this research [ref: value proposition below].

The Unknown Quotient

Both markets raised similar questions about the Unknown parent brand, but with different degrees of scepticism. The Irish interviewees were unconvinced & the UK were wary.

What resonated in Ireland:

- **The name itself:** one interviewee found it compelling: *"that is ultimately what we do – we lean into the unknown."*
- **Market segmentation:** one interviewee saw value in allowing specialist agencies to target niches. *"It allows them to segment the market more effectively with niche, targeted propositions"*
- **Subject matter depth:** valued accessing deep specialists rather than generalists.
- **Salience+:** referenced by one interviewee who challenged why it wasn't being effectively leveraged.

Shared concerns cross market:

- **The name itself:** some interviewees challenged the name.
- **In both markets,** the key unanswered question was: what does Unknown add for clients beyond what Empathy and FutaVista provide individually? *"What is the benefit of Unknown from a client perspective? Is it the sum of its parts?"*
- **Clarity risk:** Adding a parent brand layer could confuse rather than clarify, particularly in markets where personal relationships with individual agencies are paramount.

- **Lead with the specialists:** The consensus across both markets was that clients want to engage with the specialist agency, with Unknown as a credibility backstop. *‘UK clients judge you on the team in the room not corporate structure’*
- **Scepticism:** zero awareness in the UK. Suggestions to lead with Empathy Research & FutaVista. Unknown purely an internal/structural role.

The Market Opportunity

Proposed sequencing reflects three clear signals from the IDI evidence:

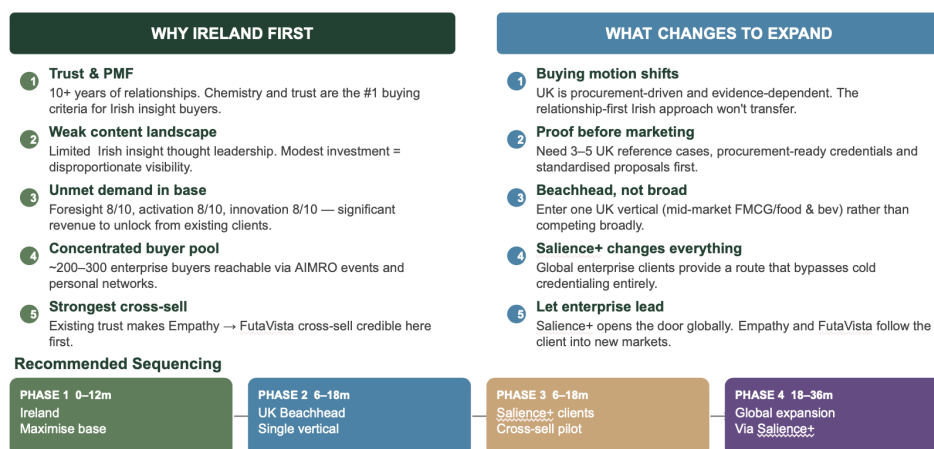
First, Irish interviewees were broadly constructive about Unknown’s propositions and willing to engage further — suggesting a market ready to be developed with relatively modest investment. UK interviewees were more critical, flagging fundamental proposition gaps that must be resolved before meaningful investment.

Second, the Irish content landscape is underserved (multiple interviewees confirmed this), meaning Unknown can build disproportionate visibility with consistent thought leadership. The UK landscape is crowded, requiring niche positioning and procurement credentials to compete.

Third, Salience+ already has UK & global enterprise clients, providing an existing entry point that bypasses the cold-market credentialing challenge. Cross-selling Empathy and FutaVista into existing Salience+ accounts is a fundamentally different go-to-market motion than building a UK presence from scratch.

Market Prioritisation & Geographic Expansion

Why Ireland first — and what changes when you expand



Overall: UK experts commented on the significant gap between how agencies operate in Ireland & what the UK requires.

‘I don’t think they understand what is happening outside Ireland. I think they are two different universes, so different.’

All UK interviewees noted that the UK market demands a level of marketing sophistication & commercial language that Unknown agencies have not yet demonstrated. One interviewee saw a significant gap between how the agencies operate in Ireland & what would be required to compete in the UK. This was echoed by another, who emphasised that successful UK agencies have ‘chosen their spaces’ and committed to clear, defensible niches

Two UK experts advise focussing on growing the Irish market & leveraging existing Irish relationships to generate warm UK referrals rather than marketing cold.

Recommendation: Position Unknown as an internal holding structure, not a client-facing brand. A clear consensus across all 17 interviews.

Lead with Empathy Research or FutaVista. Resist diluted effort across two markets prematurely. Before committing resources to a UK entry.

Readiness criteria:

Propositions: rewritten, tested & refined.

Awareness: Empathy Research known among 15–20 top Irish buyers.

Proof: at least 3 referenceable case studies with measurable commercial outcomes.

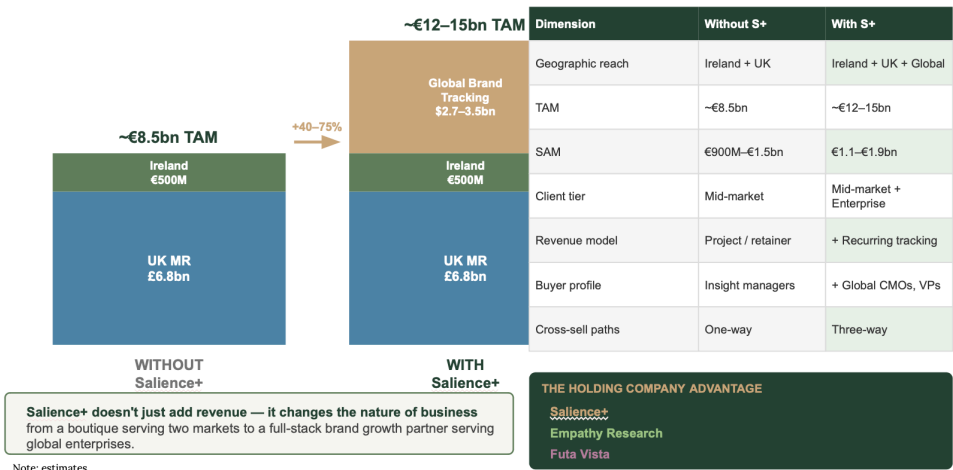
Niche: a specific UK specialism chosen and claimed through thought leadership.

Pipeline: 5–10 warm introductions generated via Irish client networks.

Addressable Market - now & next

From Boutique to Global: How Salienc+ Transforms the Opportunity

Adding Salienc+ expands TAM from ~€8.5bn to ~€12–15bn. Shifts the client profile from mid-market to enterprise



Sources: ESOMAR & Estimates.

Value Propositions

Interviewees across both markets were shown early-stage [value propositions](#). Feedback was mixed – more constructive in Ireland, more critical in the UK.

Empathy Research

“I would just become razor sharp and uber clear on what your value propositions are and what you’re saying to the market, with no ambiguity.”

Resonance	
Positive	Negative
The action orientation – “what people really feel and what to do about it” – was the single strongest element x both markets. UK interviewees responded positively to the “ <i>what to do about it</i> ” framing.	Competitive overlap: “human understanding” with System1. Not differentiating. Too soft for UK buyers who need commercial impact, P&L contribution & evidence-based decisions rather than empathy & understanding.
“Data, human understanding, cultural insight” well received in Ireland and by some UK interviewees.	“Closing the empathy gap” divided opinion in both: some found it compelling, others found it forced or unclear. “Increasingly complex world” was universally weak – dismissed as cliché in Ireland and a “waste of words” in the UK.
The brand name “Empathy” is itself a powerful strategic asset – it inherently signals the value proposition in a way no competitor name does.	Comments that cultural insight was FutaVista territory & couldn't be delivered by Empathy Research without it.

Proposition	Level of distinctiveness	Commentary
"Increasingly complex world"	Zero	Every consultancy, agency & platform can say this. A cliché, a waste of words. It describes a context, not a capability or outcome. Any competitor could put this on their website tomorrow and it would be equally true & equally meaningless.
"Data, human understanding, cultural insight"	Low	Describes the ingredients of good research, not what makes Empathy different. System1 already owns "human understanding". Ipsos talks about cultural insight. Kantar talks about data. The combination is reasonable but not distinctive enough to make a buyer choose Empathy over alternatives. It's a category description, not a differentiator.
"What people really feel and what to do about it"	Moderate	Strongest tested element because of action orientation – the "what to do about it" half. Most agencies stop at understanding; promising action/outcomes is rarer. But it's still a claim rather than a proven, branded capability. Any agency could adopt this language. No proprietary methodology, framework, or track record anchoring it.

"Closing the empathy gap"	Low to moderate	Link to brand name gives it some natural ownership, but interviewees found it either unclear or forced. The concept of a "gap" between orgs and their consumers is real, but the phrase doesn't communicate what Empathy specifically does to close it. Evocative but not commercial.
"Future priming"	Low	As currently articulated. The phrase is novel but abstract. It speaks to individual enlightenment, not organisational value. Others all offer "future-readiness" in more concrete, outcome-oriented terms. The phrase itself has no inherent meaning to a buyer who hasn't been educated on it.

FutaVista: Proposition Feedback

The underlying capability is strong. The articulation of it is not yet landing.

1 Too individualistic, not organisational

Proposition speaks to personal insight and individual inspiration rather than organisational outcomes. Buyers need to justify to finance directors and boards — revenue protection, innovation pipeline, strategic decision quality. Will struggle to survive procurement scrutiny, particularly in the UK.

2 "Future priming" language not landing

Mixed-to-negative feedback. One UK expert was positive, but others found it too abstract. Lacks commercial edge UK buyers expect. The underlying foresight capability is valued — the language wrapping it is the problem, not the product.

3 Near-zero awareness outside existing clients

Awareness of FutaVista is virtually non-existent in UK. Limited in Ireland beyond existing client relationships. The brand has small independent market presence — making standalone go-to-market premature.

4 Unresolved identity question

Is FutaVista a foresight consultancy that uses consumer insight, or a consumer insight agency that offers foresight? These are fundamentally different propositions with different competitors, different buyers & different price points. Needs resolution.

“

The foresight space is interesting but the language needs to do more work. Future priming is too abstract — I need to know what it means for my business.— UK Participant

WHAT THIS MEANS FOR UNKNOWN

(1) Identity question is resolved, (2) Proposition is reframed around organisational outcomes not individual inspiration, (3) the language is tested & validated with buyers (4) at least three reference clients exist. Cross-sell foresight capability through ER relationships where trust is already established.

FutaVista: likely position as a foresight consultancy that uses consumer insight as its evidence base — not as a research agency that also does foresight? The former commands higher fees, attracts more senior buyers, and creates clearer differentiation from the crowded qualitative research market. The latter collapses FutaVista into the same competitive set as every other mid-market agency.

This positioning also creates the cleanest *integration* narrative within Unknown: Salience+ tracks what's happening, Empathy Research explains why, and FutaVista maps what's coming next. Each agency addresses a different point in the decision timeline.

Cross Market Sentiment Summary

Element	IRE +	IRE –	UK +	UK –	Net Read
“Increasingly complex world”	1*	1	0	3	Universally weak
“Data, human understanding, cultural insight”	5 (2*)	0	2	1	Strong IRE; S1 overlap UK
“What people really feel & what to do about it”	3 (1*)	0	6	0	Strongest element
“Closing the empathy gap”	2 (1*)	1	1	1	Divides opinion
“Future priming” (FutaVista)	2 (1*)	1	1	1	Too abstract for UK
Commercial edge / differentiation	n/a	n/a	0	2	Major UK gap

Counts reflect the number of interviewees expressing positive (+) or negative (–) sentiment. * denotes internal Unknown staff whose feedback should be weighted accordingly. Not all interviewees commented on every element.

Net assessment:

Current propositions describe what the agencies believe; propositions should describe what they do for clients. This is the critical pivot.

1. Tested propositions underperforming on resonance, distinctiveness & sentiment.
2. The strongest cross-market element is “*what people really feel and what to do about it*” – the action orientation resonated.
1. “Data, human understanding, *cultural insight*” is strong *but* needs differentiation from System1 in the UK.
2. “Closing the empathy gap” divides opinion in both markets.
3. “Increasingly complex world” is universally weak. The UK demands sharper commercial language and explicit differentiation from established competitors.

Most critically, the overall framing needs to evolve from descriptive brand language into structured value propositions that articulate specific buyer outcomes.

[Value Proposition tested with interviewees were closer to brand positioning statements, descriptive taglines or belief statements.

Interviewees were irritated at length & complexity. See appendix three]

Recommendation:

The client-facing propositions to be rewritten – each following the structure “We help [buyer] achieve [outcome] through [approach]” – before any UK market activity.

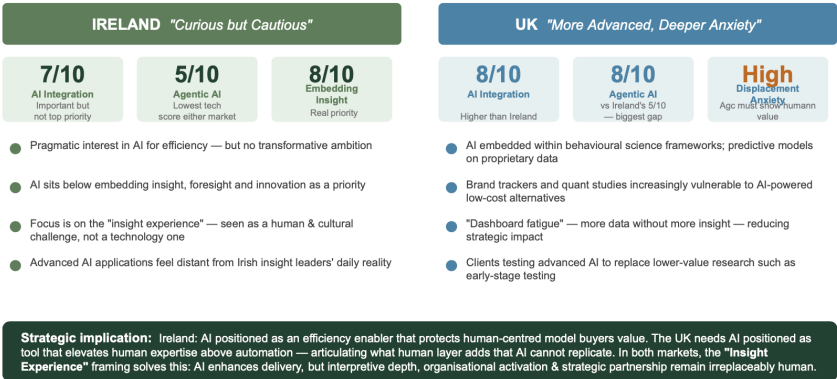
Move from brand positioning language to structured value propositions. The current language can serve as brand narrative, but it is not yet doing the commercial work of a value proposition.

AI Adoption & Technology Landscape

AI featured prominently in every interview, but the conversation has not yet matured from experimentation to strategy. Both markets are using general-purpose tools for discrete efficiency gains — faster coding, quicker summaries, less admin — while purpose-built research AI platforms remain largely unadopted.

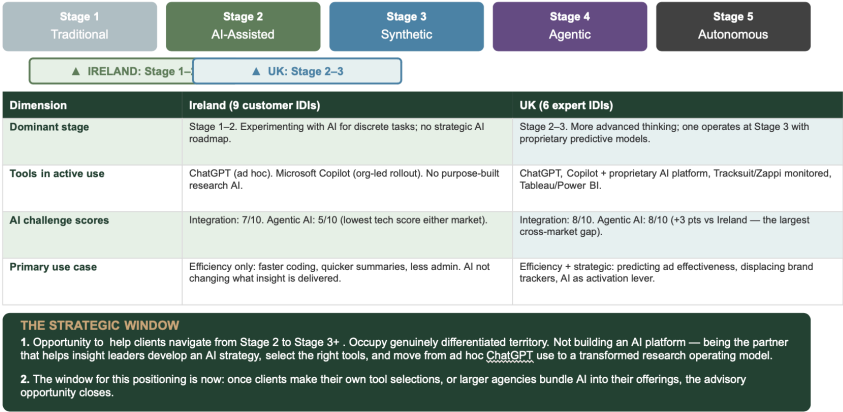
AI Readiness: Two Markets, Two Mindsets

IDI evidence reveals a significant gap in AI adoption maturity between Ireland & the UK



Where Each Market Sits on the AI Adoption Curve

Mapped against Qualtrics 2026 five-stage model: Traditional → AI-Assisted → Synthetic → Agentic → Autonomous



IDI participants referenced a range of tools & platforms shaping their research operations. The table below maps the most frequently cited technologies against their primary function and which market referenced them.

AI Tool	Primary Function	Referenced By	Strategic Implication
ChatGPT / Copilot	Ad hoc analysis, coding, summarisation	Both markets	Ubiquitous but unstructured – no governance or strategy around use
Perplexity	Research synthesis, desk research	Both markets	Replacing traditional secondary research; accelerating discovery phase
Claude	Analysis support, qualitative coding	Both markets (analyst use)	Shifting analyst skillset from manual coding to prompt engineering

“We’re experimenting. People are using ChatGPT for bits and pieces – coding open-ends, tidying up transcripts. But nobody has a strategy for it yet.” – Irish Participant 1

‘We’ve built AI into the core of what we do – it’s not a bolt-on, it’s the engine. But that took years of data and R&D investment that most agencies can’t replicate.’ – UK Participant

Key pattern:

AI tools are being adopted for efficiency (transcription, coding, summarisation) far ahead of strategic application (agentic AI, synthetic data, continuous tracking).

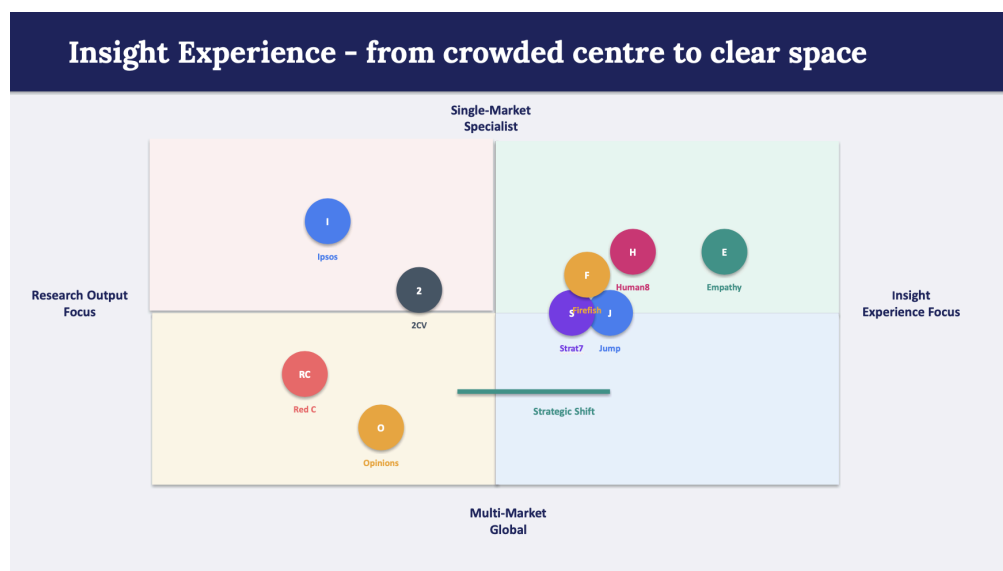
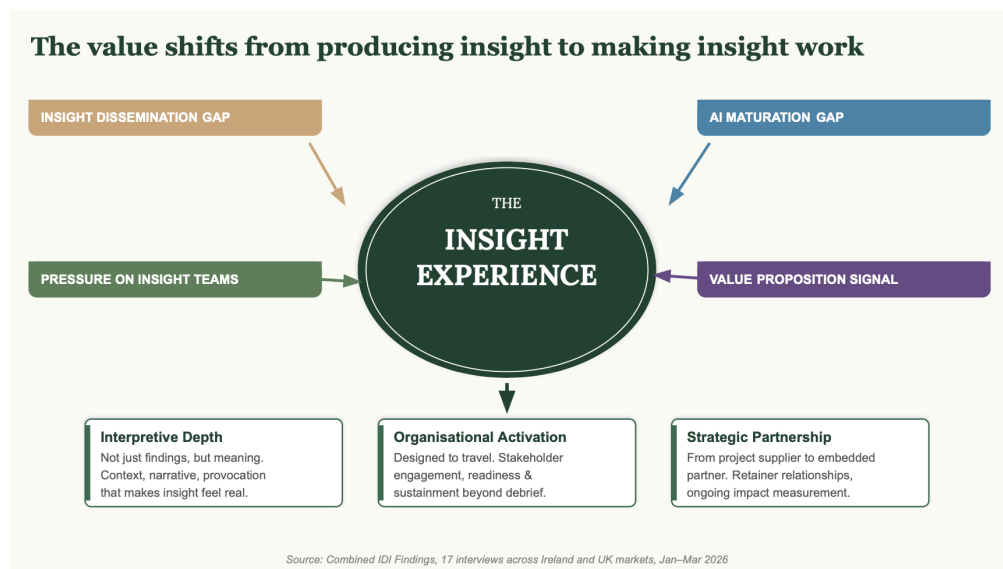
The UK’s technology discourse was more specific and more anxious – reflecting a market where AI is not aspirational but competitive.

The Future: what does this mean for Empathy Research?

The research points to a clear trajectory. Empathy Research has the foundations — strong client relationships, genuine expertise, and a brand name that is itself a strategic asset.

But three things need to change for the agency to grow beyond its current base. First, awareness: the significant barrier in both markets. Second, proposition: moving from brand narrative to structured value propositions that answer "*why you, and what will I get?*" Third, positioning: owning the "*insight experience*" territory before a competitor claims it.

The future is promising — but it requires disciplined execution, starting in Ireland where the conditions are most favourable.



Above is early stage thinking. Requires service design as well as validation.

Nine Point Checklist for the Business: Expert-Informed Priorities

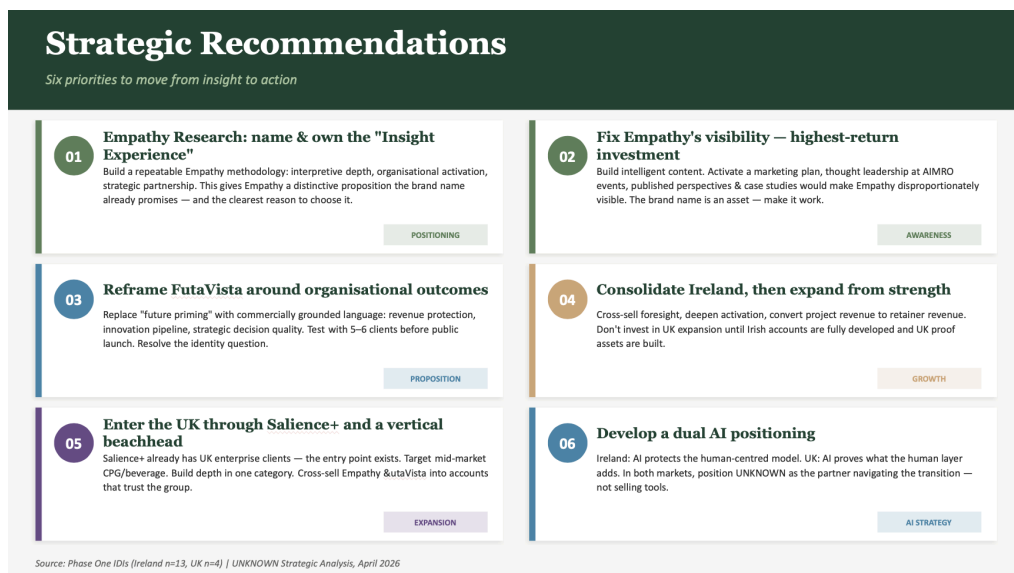
Based on IDI feedback & open source research, the following checklist captures the priority actions surfaced through Phase One. Items are sequenced by urgency.

#	Action	Detail	Urgency
1	Sharpen Empathy Research proposition	Define what makes Empathy distinctive beyond “what people really feel.” Leverage the brand name as an asset.	Critical
2	Resolve FutaVista identity question & proposition	Foresight consultancy or insight agency? Pick one & commit. Reframe around organisational outcomes.	Critical
3	Build smart Irish visibility	AIMRO events, published perspectives, case studies. The content landscape is sparse — fill it.	High
4	Define the “Insight Experience” methodology	Name it, structure it, make it repeatable. Three pillars: interpretive depth, activation, strategic partnership.	High
5	Develop AI positioning per market	Ireland: AI protects the human model. UK: AI proves human value.	High
6	Map Salience+ cross-sell pathways	Identify 3–5 enterprise clients for Empathy/FutaVista cross-sell. This is the UK entry strategy.	Medium
7	Convert project revenue to retainers	Move Irish accounts from episodic projects to retained advisory relationships. Highest commercial impact.	Medium
8	Build UK proof assets	3–5 procurement-ready case studies, ROI evidence, credentials deck. Required before meaningful UK investment.	Medium
9	Validation	Road test revised propositions. Validate SAM/SOM with Salience+ data.	Medium

The checklist above captures the operational priorities. The section that follows distils the strategic conclusions from the full body of evidence.

What the Research Tells Us

- **The industry has a delivery problem, not a methodology problem.** Buyers are satisfied with research quality. They are frustrated by the gap between receiving insight and seeing it change decisions. This is the territory Empathy Research should own.
- **Two markets, two operating models.** Ireland runs on trust & chemistry — cost is secondary. The UK runs on procurement and ROI — cost pressure is constant. A single go-to-market will likely fail.
- **Empathy Research has an awareness problem, not a quality challenge.** Those who know ER rate it highly. But visibility is dangerously low. The brand name is an underleveraged asset — "Empathy Research" says exactly what it does. Make it work harder.
- **Neither proposition is market-ready.** FutaVista's language is too abstract, its framing too individualistic, and its identity question unresolved. Empathy's positioning lacks distinctiveness. Neither should be pushed hard until sharpened and validated with buyers.
- **Ireland first** — expand beyond only through Salience+. Without Salience+, Unknown is a boutique Irish agency group in a £6.8bn market. With it, the holding company has a global entry point & a credible niche.
- **AI is playing an efficiency game today** — but it will reshape the entire operating model tomorrow. Client-side teams will shrink, in-house capability will grow. Agencies selling execution will lose. Those selling judgement, integration, and strategic interpretation will win.
- **The window to position as an AI leading partner is open now** — it won't stay open long. Ireland is *curious but cautious* (Stage 1–2). The UK is more *advanced but more anxious* (Stage 2–3). First movers will define the category.



Next Steps

From findings to action — six workstreams over the next 6 months

MONTHS 1–2 Foundation

01

Proposition Development Workshops

CRITICAL

Facilitated sessions for Empathy Research and FutaVista. Sharpen positioning, test language, resolve the FutaVista identity question. Validate with 5–6 existing clients.

Months 1–2

03

Irish Content & Visibility Plan

HIGH

Build a 6-month thought leadership calendar; AIMRO events, published perspectives, case studies. Fill the empty Irish content landscape before competitors do.

Months 2–4

05

Phase Two Research

MEDIUM

Validate SAM/SOM with actual Salience+ client data. Build the bottom-up revenue model.

Months 4–5

MONTHS 3–4 Build

02

Empathy "Insight Experience" Framework

HIGH

Define Empathy Research's named methodology: what it includes, how it's delivered, and why the brand name already promises it. This becomes Empathy's core go-to-market narrative.

Months 1–2

04

Salience+ Integration Roadmap

HIGH

Map cross-sell pathways between Salience+ and Empathy/FutaVista. Identify 3–5 existing Salience+ enterprise clients as UK entry targets.

Months 2–3

06

UK Beachhead Strategy

MEDIUM

Select vertical (FMCG / food & beverage), build 3–5 procurement-ready case studies, identify UK agency partner. Enter through Salience+ client relationships.

Months 5–6

MONTHS 5–6 Launch

Source: Phase One IDs (Ireland n=13, UK n=4) | UNKNOWN Strategic Analysis, April 2026

Appendix:

Appendix One

Characteristics of best-performing versus poorer-performing research businesses in 2026

The GRIT 2025 Business & Innovation Report, the Qualtrics 2026 Trends Report, and broader industry data paint a fairly clear picture of what separates the two.

Best performers share these characteristics:

They have a clear, intentional AI strategy — not just experimentation. Suppliers that exceeded their goals boldly leverage AI for core project functions like report writing and survey design. The key insight from GRIT is that success isn't about having AI — it's about knowing where to apply it. Purpose-built AI tools embedded in research software are outperforming generic chatbot approaches (usage grew from 62% to 66%, while general-purpose AI tools actually dropped from 75% to 67%).

They blend technology with human expertise rather than choosing one over the other. GRIT 2025 explicitly states that true innovation now depends on integrating technology, data, and human interpretation. Full-service research is actually rebounding, but only where it combines primary research, analytics, and technology. The most successful companies are building what amounts to a hybrid model.

They connect research to business outcomes, not just deliverables. The best-performing agencies have a clear point of view on how research connects to strategy and the capability to help clients act on what they learn. This is the insight activation concept in practice — it's not an abstract idea, it's what's driving revenue growth at the top end of the market.

They invest in proprietary technology or platforms. Whether it's Strat7's Nucleus, Rival Technologies' conversational research platform, or Quantilope's automated research tools, the fastest-growing companies have something proprietary that creates switching costs and differentiates them from the sea of agencies offering broadly similar services.

They operate at speed. Modern automated research platforms deliver insights in days rather than weeks. The traditional agency turnaround of 6–8 weeks for a project is increasingly unacceptable to clients making decisions in real time.

They have diversified revenue models. The best performers aren't solely dependent on project revenue — they have subscription platforms, retainer relationships, technology licensing, or community-based ongoing engagements that provide predictable recurring revenue.

Poorer performers share different characteristics:

They are service-led without technology differentiation. GRIT 2025 is unambiguous: company optimism has held steady among technology providers but continues to decline for service-led firms, especially smaller ones. Service-only models are struggling to keep pace.

They are losing the cost competition without winning the value competition. Lower-cost competitors weigh most heavily on the largest service-led firms. But the problem isn't just being undercut on price — it's failing to articulate why higher-cost human expertise is worth paying for. They're stuck in a middle ground where they're more expensive than automated platforms but not sufficiently differentiated from them.

They lack a clear AI strategy. Teams still in experimentation mode, without a clear strategy for how AI fits into their offer, are seeing demand stagnate. 37% of traditional teams report flat or declining demand versus only 20% of AI-integrated teams. That's nearly double the risk of decline.

They deliver reports rather than outcomes. The old model — brief, fieldwork, debrief deck, invoice — is the defining characteristic of agencies losing ground. If the relationship ends at the debrief, the agency is commoditised and replaceable.

They have no proprietary assets. Agencies that rely entirely on third-party tools and generic methodologies have nothing that creates loyalty or switching costs. Any competitor can replicate their offer. The lack of a unique platform, community, dataset, or methodology makes them structurally vulnerable.

They are slow. Agencies still operating on 6–8 week project timelines are being bypassed by clients who can get directional answers from AI tools in hours.

The evidence on what makes a strong versus weak agency came from two sources:

1. The IDI interviews themselves — across all 17 interviews, interviewees described what they valued and what frustrated them about agencies. The competitive landscape tables (Irish and UK) were built from these interviewee observations. For example, the strengths/weaknesses of Ipsos, Red C, Opinions Research, Jump, System1 etc. all came directly from what your interviewees said about their experiences with those agencies.

2. Published industry sources referenced in the Combined IDI Findings document, specifically:

- **2025 GRIT Insights Practice Report** (Greenbook) — which identified the "Strategic Insight Consultant" as the emerging model and found that full-service research is rebounding, with the most successful firms blending primary research, analytics, and technology.
- **Mustard Research, Client-Side Challenges 2026** — which confirmed what client teams need from agencies: commercially literate partners who understand internal budget cycles and deliver outputs that work across the organisation, including boardrooms.
- **ESOMAR Global Market Research 2024** — for broader market structure data.
- **MRS League Tables 2026** and **MRS/Research Live Industry Reports** — for UK market sizing and competitive structure.

Appendix Two

Mapping IDI Findings to the AI Maturity Curve

The Qualtrics 2026 Market Research Trends Report (3,000+ researchers across 17 countries) maps a five-stage AI adoption curve specific to consumer research. We have used this framework to position where each market's described practice sits:

Stage	Label	Description	Adoption
1	Traditional	Manual survey design, fieldwork, and analysis. No AI involvement.	Shrinking minority
2	AI-Assisted	AI handles discrete efficiency tasks: cleaning open-ends, auto-coding verbatims, drafting discussion guides, summarising transcripts.	~65% of researchers
3	Synthetic	AI generates simulated respondent data to supplement or stress-test real samples. Digital twins of consumer segments, predictive modelling.	~40%
4	Conversational	AI conducts the research interaction itself – chatbot-moderated depth interviews, dynamic surveys that adapt in real time, always-on feedback loops.	~25%
5	Agentic	AI autonomously designs research, fields it, analyses results, and generates strategic recommendations. Human researchers shift to QA and strategic interpretation.	~15%

Ireland – the efficiency lens:

“We’re experimenting. People are using ChatGPT for bits and pieces – coding open-ends, tidying up transcripts. But nobody has a strategy for it yet.” – Irish Participant 1

“AI is interesting but it’s not what keeps me up at night. Getting insight to actually land in the business – that’s the real problem.” – Irish Participant 6

“Copilot is there, we all have it, but honestly I’m using it more for tidying up emails than for anything to do with research.” – Irish Participant 3

UK – the strategic and existential lens:

“Brand trackers are going to become fewer as time goes on, because they’re massive and they cost so much money. The AI alternatives are already here.” — UK Participant 1 (UK)

“We’ve built AI into the core of what we do — it’s not a bolt-on, it’s the engine. But that took years of data and R&D investment that most agencies can’t replicate.” — UK Participant 3 (UK)

“The danger is that everyone deploys dashboards and self-serve analytics and thinks they’ve solved the insight problem. They haven’t. They’ve just created dashboard fatigue.” — UK Participant 5 (UK)

Ireland — ChatGPT and Microsoft Copilot dominate. Irish interviewees who discussed specific tools primarily referenced ChatGPT and Microsoft Copilot. Usage is concentrated on discrete productivity tasks: drafting discussion guides, summarising meeting notes, cleaning and coding open-ended responses, and generating first-pass analyses of qualitative data. Several interviewees described using ChatGPT “for ad hoc tasks” but had not integrated it into a systematic research workflow. Copilot was mentioned by those whose organisations had rolled it out as part of Microsoft 365 — used for document summarisation, email drafting, and PowerPoint generation rather than research-specific functions. No Irish interviewee described using a purpose-built AI research platform (such as Speak, Notably, or Relative Insight). The technology adoption is personal and informal, not organisational.

“We’re experimenting. People are using ChatGPT for bits and pieces — coding open-ends, tidying up transcripts. But nobody has a strategy for it yet.” — Irish Participant 1

Tools named in UK interviews: UK interviewees referenced a broader technology landscape than their Irish counterparts. Beyond ChatGPT and Copilot (which were common across both markets), UK discussions named or described: a proprietary AI platform for emotional prediction, Tracksuit (automated brand tracking), Zappi (brand health and concept testing), self-serve dashboard platforms (Tableau, Power BI), and AI-assisted qualitative analysis tools. The UK’s technology discourse was more specific and more anxious — reflecting a market where AI is not aspirational but competitive.

 **Published evidence:** The 2025 GRIT Report confirms that AI has moved from buzzword to baseline, now embedded into many research workflows. Critically, purpose-built AI tools embedded in research software (66% adoption) are outperforming general-purpose chatbots (67%, down from 75%). However, data quality remains the top industry concern, with worries increasing 40% YoY driven by synthetic responseCross-Market Challenge

Improving speed, scale

ts and survey fatigue. Brand-side researcher satisfaction with AI tools is just 13%. — 2025 GRIT Insights Practice Report; ESOMAR Global Market Research 2024; Greenbook Business & Innovation Report 2025

Pattern summary: The modal position across both markets is “using ChatGPT or Copilot for discrete tasks, with no strategic AI roadmap.” Ireland sits firmly at Stage 1–2, with AI adoption that is personal, informal, and efficiency-focused. The UK is one stage ahead in awareness and anxiety, with pockets of Stage 3 practice, but most UK interviewees are also functionally at Stage 2. No interviewee in either market described anything approaching Stage 4 (conversational) or Stage 5 (agentic). This represents both a vulnerability and a major opportunity for Unknown: clients need a guide to move beyond ad hoc experimentation.

The technology stack gap: A critical finding is the near-total absence of purpose-built research AI platforms from interviewee descriptions across both markets. The dominant tools — ChatGPT and Copilot — are general-purpose assistants being adapted for research tasks. This aligns with the GRIT finding that general-purpose AI tools dropped from 75% to 67% adoption while purpose-built tools grew from 62% to 66%. The industry is moving toward specialised tools, but our interviewees have not yet made that shift. The agency that helps them navigate this transition occupies a genuinely differentiated position.

 **Published evidence:** The GRIT 2025 Report maps a complementary three-phase model — Experimentation, Integration, Transformation — and finds that while 95% of researchers are using or experimenting with AI, satisfaction among brand-side insight teams is remarkably low at just 13%. Most organisations are stuck at Stage 2, automating individual tasks without rethinking their operating model. — 2025 GRIT Insights Practice Report (Greenbook)

The GenAI Paradox and Strategic Implications

The GenAI Paradox: Qualtrics identifies what it calls the “GenAI paradox”: organisations that invest in AI tools without transforming their business model simply accelerate cash burn. Efficiency is “the floor, not the ceiling.” The real value unlock comes at Stages 3–5, where AI changes what research can do, not just how fast it does it.

This paradox is directly visible in our IDI data. Irish interviewees who discussed AI framed it almost exclusively in terms of efficiency — faster coding, quicker summaries, less time on administrative tasks. No Irish interviewee articulated how AI might fundamentally change what insight they could deliver or how their function would operate. The UK interviews were more advanced in recognising the implications but also more anxious about them.

Implication for Unknown: An agency that can help clients navigate from Stage 2 to Stage 3+ would occupy genuinely differentiated territory. This is not about building an AI platform — it is about being the partner that helps insight leaders develop an AI strategy, select the right purpose-built tools for their workflow, and move from “using ChatGPT for ad hoc tasks” to embedding AI into a transformed research operating model. The window for this positioning is now: once clients make their own tool selections (or larger agencies bundle AI into their offerings), the advisory opportunity closes.

 **Published evidence:** At the task level, adoption maps roughly as follows: survey design and questionnaire drafting (~65%, Stage 2), analysis automation where 500 open-ends go from 20+ hours to minutes (Stage 2), automated reporting and dashboarding (Stage 2), conversational analytics and visual content analysis (both ~49% adoption, straddling Stages 2–3), and synthetic data usage (62% experimenting, Stage 3). The technologies enabling Stages 3–5 include fine-tuned LLMs trained on panel data, agent-based simulation platforms, synthetic data generators (Kantar, Zappi, Evidenza), conversational AI with retrieval-augmented generation, and voice-to-insight platforms. — Qualtrics 2026 Market Research Trends Report

Appendix Three

A Structural Observation: Are These Value Propositions?

UK interviewees (in particular) commented these were not strictly speaking value propositions.

A value proposition answers: “Why should I choose you over the alternatives, and what measurable outcome will I get?” What was tested — phrases like “increasingly complex world,” “closing the empathy gap,” and “future priming” — are closer to brand positioning statements, descriptive taglines, or belief statements. They describe a worldview or an aspiration, but they do not articulate specific value to a buyer.

This distinction matters commercially. UK interviewees expect to see propositions that connect capabilities to outcomes: “*We help [target buyer] achieve [specific result] through [differentiated approach].*” Instead, they received language that needed significant translation before a procurement team, CMO, or finance director could evaluate it.

The critique that the propositions lack “commercial edge” and that they “don’t stand alone as enough to differentiate” both reflect this structural gap.

Length and engagement: visible irritation at the volume of language presented — multiple phrases, layered concepts & compound statements that required close reading. A value proposition should be immediately graspable; these required explanations..

1. Language not motivational. A strong value proposition should make a buyer feel something — excitement about a new possibility, relief that a problem could be solved, urgency about a competitive gap.
2. Too descriptive and passive rather than energising. Phrases like “increasingly complex world” describe a context; “closing the empathy gap” names an aspiration; but neither makes a buyer lean forward and say “I need that.” The action-oriented “what to do about it” was the only element that generated genuine energy.