



FROM FULL CIRCLE RESEARCH

CASE STUDIES

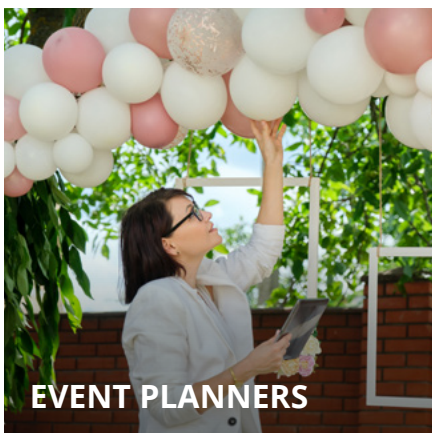
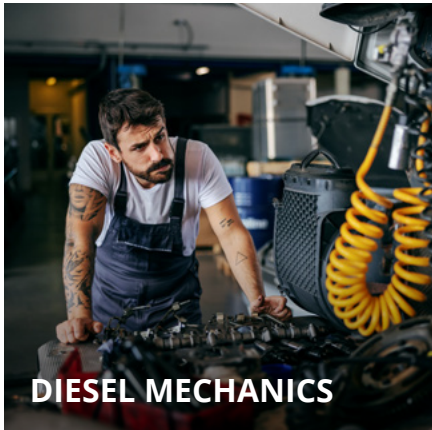
**How to find the
hardest-to-reach
audiences on
the planet.**

INSIDE

Contractors	p. 3	IT Pro Decision-Makers	p. 11
Financial Advisors	p. 9	Cryptocurrency Users	p. 13

InstaConnect®

Looking for non-panelists?



Bypass expensive and time-consuming offline methodologies and go straight to Full Circle Research's InstaConnect®. Our premium programmatic solution is more affordable and efficient than phone interviews and is proven to convert even the most low-incidence respondents—**all while ensuring you receive the industry's highest quality data.**

First, InstaConnect tracks the behavior of digital users across websites, social media, affiliate networks and more; it then uses the data to connect non-panelists to the surveys and polls they're most likely to complete—automatically, seamlessly and in real time.

These respondents are then funneled through HoNoR®, our award-winning, enhanced survey experience, which eliminates fraud at the highest level in the industry—also automatically, seamlessly and in real time.

Nate Lynch, Full Circle Co-CEO, happily shares answers to some of our clients' most-asked questions about InstaConnect. Check out his interview on page 17.

To get started capturing the high-quality non-panelists you need, contact us today.

InstaConnect: Case Studies

The founders of Catapult Insights—an outcomes-focused insights and innovation consultancy—have long turned to Full Circle to satisfy their online sample needs. So when we launched InstaConnect, they enthusiastically put the product to the test. Our first survey with them was for contractors. Other audiences soon followed, as did a second wave for the original contractor project. Read on for a taste of the results.



//

For clients wanting a faster, cheaper alternative to CATI—without sacrificing quality or response rates—InstaConnect is a game changer. *p. 15*



Article excerpted with permission
from Catapult Insights.

HOME IMPROVEMENT PROS FEELING MORE STABLE AFTER UNCERTAIN 2022

The year 2022 was a rollercoaster for the home improvement, home construction and home sales industries. The ups and downs of the first six months made the team at Catapult Insights wonder: What are home improvement professionals thinking today? And what do they expect the future to look like?

To find out, Catapult Insights partnered with online sample provider Full Circle Research to get a pulse on home improvement professionals in the US. The data, collected in August 2022, revealed that this niche audience was still feeling the impact of inflation, supply chain issues and staffing shortages from 2021. And many expected those issues to continue to impact their revenue in the future.

Six months later, Catapult and Full Circle ran the survey again. Here's what's changed in the minds of these professionals.

Inflation's impact is expected to decrease. In 2022, 65% of pros expected their revenue to be impacted by inflation in the next year. Far fewer are saying that today—only 1 in 5 say they expect inflation to impact their revenue in 2023. Have pros successfully regulated the effects of inflation with updated expectations for margins, or is it perhaps that higher costs are successfully being passed down to homeowners?

Supply chain issues are expected to be far less concerning. Half of pros in 2022 said they expected supply chain issues to impact their revenue in the next 12 months; that number dropped to just 8% in 2023. Are supply chain issues a thing of the past or have pros found workarounds that allow them to preserve their revenue streams?

Staffing issues aren't expected in 2023. Only 7% of pros say they expect to have staffing issues in 2023, which is a significant drop from the one-third of pros who said they expect staffing issues in 2022. Are the number of projects beginning to level out, or are more skilled laborers returning to the trades?

The increased optimism we're seeing among pros aligns with the shifts that the University of Michigan Consumer Sentiment Index, a well-regarded economic indicator which measures the degree of optimism consumers feel about the economy and their own financial situation, has seen over the last year. The months of June and July were the lowest point for the index (current, future and combined) in 2022, and now all three indexes are up, indicating that consumers overall are more confident about the economy today and in the future than they were just six months ago.

//

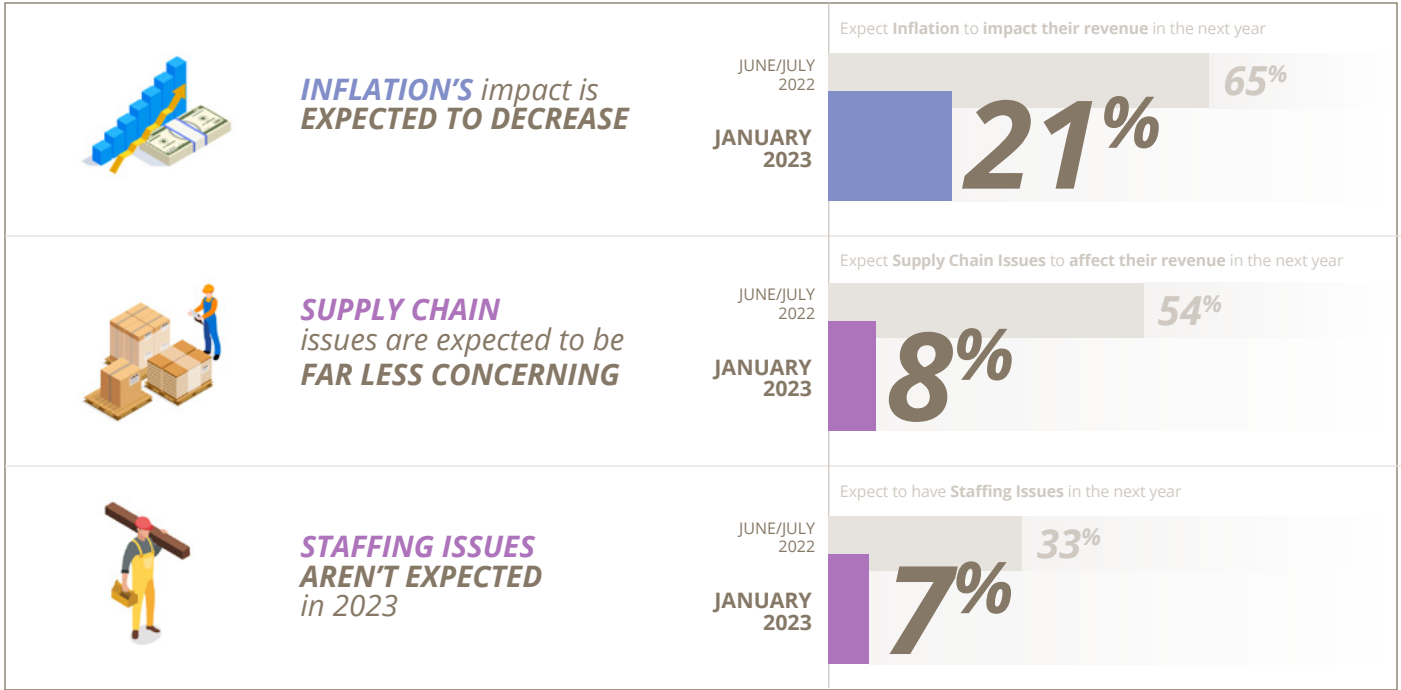
Last year, I gave a quotation for a contract. Since winning the job, I realized that the price of things had really gone up. I informed my client, but he was furious and wouldn't add a penny. I had to pay out of my pocket. *—Survey participant*



“

As a woman, people never believed in me. So I give every job my all, and my clients give me nothing but positive reviews. Don't stop believing in yourself. You can achieve anything you set your mind to achieve.

-Survey participant



SOURCE: Full Circle Research 2023 Professional Pulse Survey

Clearly the home improvement industry is continuing to shift, but what does this mean for durable goods brands and retailers?

Keep a consistent pulse on your customers. In just six months, home improvement professionals went from expecting an uphill battle with inflation, supply chains and staffing to feeling more secure with what the future may bring. The economy is shifting, and people are feeling it, which impacts their behaviors and expectations. During times of constant change, it is critical to keep a pulse on what consumers are doing, thinking and planning, so your brand can be proactive in your marketing and business strategy.

Watch for over-supply in the market. Like the supply chain, a backlog of home improvement projects may finally be unraveling and returning to a more normalized baseline. This means durable goods manufacturers should be watchful of over-supplying the market—something that's been on our minds since last year. Keeping a watchful eye on consumer spending behaviors and the Consumer Sentiment Index can help your brand keep pace with demand.

Keep tabs on interest rates and what the downstream effect might be for your business. After a relentless climb last year, interest rates sit at just under double what they were early 2022. High interest rates will likely depress home sales/buying as we move through 2023. People are staying put

in the homes they've likely already invested some home improvement dollars into over the past two years when home improvement projects were booming. Given this, it stands to reason that demand for home improvement projects might slow down, which potentially means lower supply chain strain and lower staffing needs for pros to upkeep. Brands who stay relevant and innovate will be top of mind for consumers and pros, making them more likely be able to snag a large piece of that home improvement budget pie, even if its overall size shrinks.

Innovate. This one is important: As signs of an apparent recession loom, we can expect more wild swings in pro (and consumer) confidence. This whiplash is challenging to navigate and can have long-term effects on consumer behavior and what people care about most. Be the brand that builds consumer confidence and stays top-of-mind by continually innovating, even when economic times are uncertain. History shows us that brands that innovate during a recession can come out on top. Focus on trends and evolving consumer needs, take risks and work to take your brand and products into the future to meet consumers where they will be down the road.



LIFE INSURANCE PURCHASERS



MECHANICAL ENGINEERS



COSTUME DESIGNERS



HOTEL MANAGERS



GAME DESIGNERS



PRIVATE PLANE PILOTS



LUXURY MAKE-UP BUYERS



FIREFIIGHTERS



SALON OWNERS



EMTs



PRIVATE SECURITY OFFICERS



COWBOYS



**AFTER-MARKET
PART BUYERS**



ARCHITECTS



FARMERS



CHEMICAL ENGINEERS



TEACHING ARTISTS



HIGH-NET-WORTH TRAVELERS

**SINCE 2019,
INSTACONNECT
HAS BEEN
FINDING
ELUSIVE
AUDIENCES
LIKE THESE.**

Quick Hits

InstaConnect's flexibility ensures it's as effective with tracking work as it is with capturing the pulse of an audience in any given moment, as demonstrated by these surveys also disseminated for Catapult Insights.

FINANCIAL ADVISORS

In early Q1 2023, Full Circle used InstaConnect to find 95 US finance professionals. The results were illuminating.

What are the biggest concerns plaguing financial professionals and their clients regarding financial planning, retirement and the future?

Overall, **loss of income is the #1 concern** plaguing financial professionals and their clients at the start of 2023. This comes as no surprise after the series of sweeping tech layoffs we've seen so far this year. That said, while these layoffs are top-of-mind and widely discussed, they may not be indicative of the overall US job market, as unemployment rates are down across the US, [falling to their lowest rate \(3.4%\) since May 1969](#). Perhaps these so-called "[Loud Layoffs](#)" happening at household-name companies just feel more salient and impactful due to the extensive media coverage. And top-of-mind layoffs can easily drive concerns over loss of income.

Market uncertainty is another top concern, especially among professionals who rank it as their #2 concern. Inflation is among the top 3 concerns for pros and their clients focused on financial planning.

When it comes to clients, **planning for retirement, unexpected expenses and loss of income are top concerns**, which would exist in any economic state. Financial pros also say those planning for retirement are similarly concerned with market uncertainty and inflation.

Economic downturn, while still a concern among many, ranks lower than others, particularly when it comes to planning for retirement. This thinking aligns with historically low employment rates and GDP growth in the US. Even still, [Forbes reports](#) that two-thirds of economists at the World Economic Forum believe a recession is coming in 2023.

TOP CONCERNS FINANCE PROS...

...HAVE ABOUT THE FUTURE

... SAY THEIR CLIENTS HAVE ABOUT RETIREMENT

... SAY THEIR CLIENTS HAVE ABOUT FINANCIAL PLANNING



* Such as illness

** Such as a recession



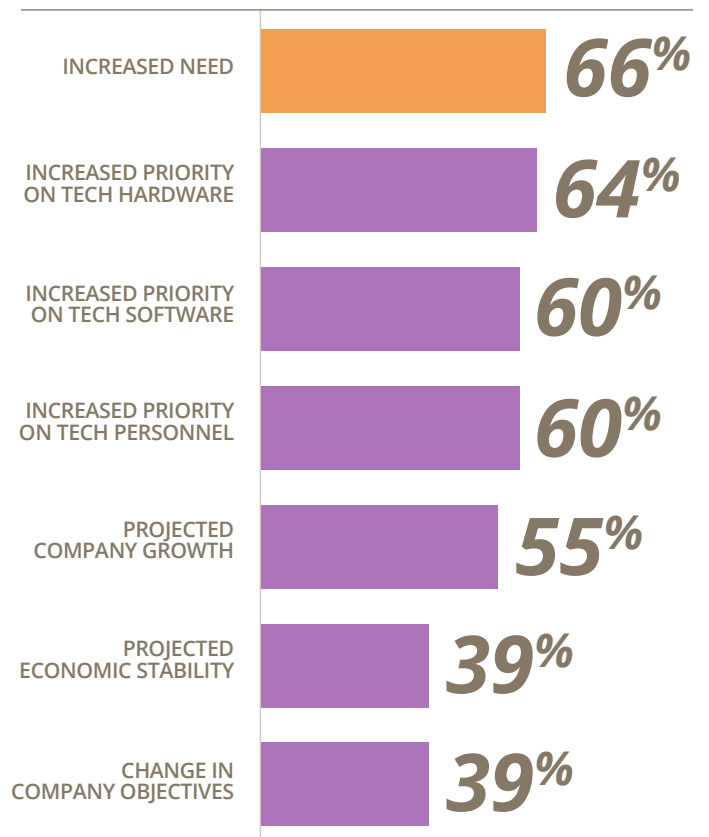
IT PRO DECISION-MAKERS

From January 11-12, 2023, InstaConnect surveyed 95 full-time US IT professional decision-makers. What were some of our key findings?

Aging tech stacks are top-of-mind in a rapidly changing environment. This appears more prevalent among younger IT pros (71% of those aged 18-29) as well as 68% of organizations doing some of their own software customization. For insight, we spoke to Catapult Insight's Justin Sutton, who has supported Google's DevRel team in understanding how developers and IT decision makers approach technology decisions. "Technology requires constant investment to allow the line of business to stay competitive, and out-of-date, legacy tech is quickly identified as a cost and maintenance nuisance. This drives interest in cloud solutions." (Our data shows 99% using some cloud productivity suites, but 65% still using on-premise productivity suites, so there's a mix which seems likely to continue trending away from on-prem solutions).

Confidence in digital transformation spending is rising. Acceleration of IT spending is expected from 81% of those surveyed, and 92% of those in organizations that customize their software. Gartner is also reporting an [expected rise in worldwide IT spending in 2023](#).

According to IT pros, what's driving increased spending on IT in 2023?





Even amid uncertain economic times, IT spending continues to trend upward, which is typically accompanied by deeper cuts elsewhere in corporate budgets. A recent example of this can be observed by larger tech firms recently making headlines for thousands of layoffs paired with massive investments into new AI-driven solutions. Says Sutton, "Many IT pros are highly aware of their traditional position as a cost-center in their organizations, especially less mature, smaller companies. This can drive sensitivity to spending more. Paired with recent layoffs in the tech sector, this could create heightened sensitivity toward development of autonomous systems and advanced tech that could, eventually, eliminate their own positions." Further defined in [StackOverflow](#), the confidence we're seeing today could evaporate into self-preservation attitudes tomorrow.

Budgets are expanding, but still a strain for some. 67% of IT pros in organizations that use off-the-shelf software report funding issues standing in the way of technology goals. "Smaller companies that have traditionally gotten by using off-the-shelf solutions will be seeking to do more with less," anticipates Sutton. "Software providers should be looking for ways to cater to this audience with more tailored solutions and managed services."

CRYPTOCURRENCY

What's on the minds of crypto users?

This January, InstaConnect asked 129 novice, intermediate and advanced cryptocurrency users to share.

2023 WILL BE A YEAR OF TRAVEL.

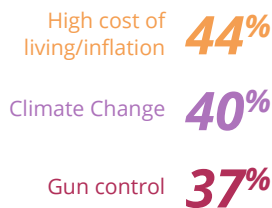
Among those who have traveled in the past year, 72% say their leisure travel will increase in 2023, and 74% say their business travel will increase in 2023.



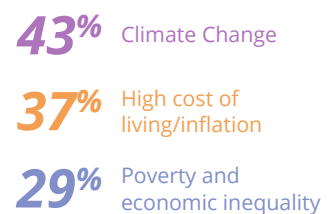
HIGH COST OF LIVING/INFLATION IS A TOP CONCERN.

High cost of living/Inflation, climate change and gun control are their top concerns for the US. When it comes to global concerns, gun control drops out of the top three and poverty and economic inequality takes its spot.

TOP 3 US ISSUES CONCERNING CRYPTO USERS



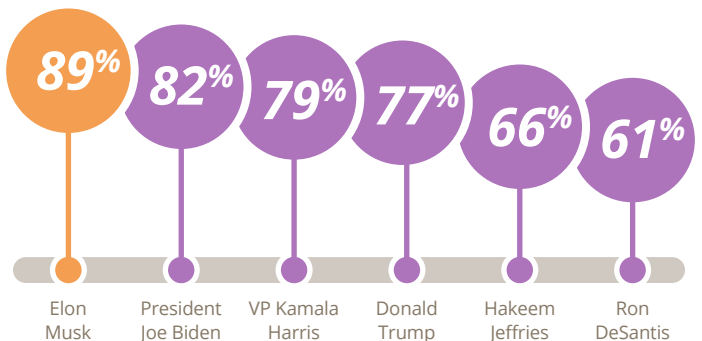
TOP 3 GLOBAL CONCERNING CRYPTO USERS



ELON MUSK IS HELD IN HIGH REGARD.

Elon Musk outranks President Biden, Vice President Harris and Former President Trump in terms of favorability among crypto users, and over two-thirds (69%) think Twitter is headed in the right direction under Musk.

PERCENT RATING AS VERY/SOMEWHAT FAVORABLE





THEY SEE A POTENTIAL RECESSION ON THE HORIZON.

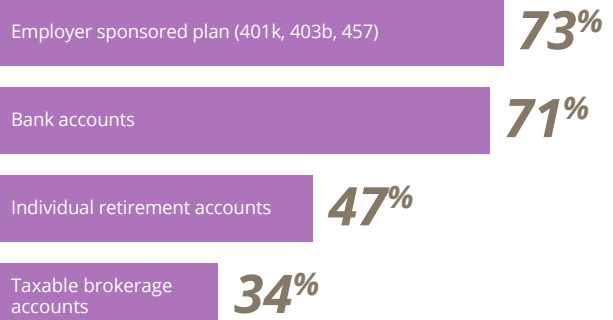
But they have confidence in our government's actions to prevent it. While half (51%) believe the US will face a recession in 2023, over two-thirds (69%) say the government is doing enough to prevent a recession



PLANS CALL FOR GETTING DEEPER INTO CRYPTO.

While nearly two-thirds (62%) say they plan to invest more into cryptocurrency, simultaneously, this group will continue diversifying their assets through more traditional investment vehicles, including employer sponsored plans, bank accounts, IRAs and taxable brokerage accounts.

PERCENT UTILIZING EACH RETIREMENT VEHICLES





Q&A

InstaConnect is like nothing the MRX industry has seen before. What makes it different? What makes it successful? We asked Full Circle Co-CEO Nate Lynch to help us answer.

What kinds of projects are most successful with InstaConnect?

NL: Low-incidence audiences are InstaConnect's sweet spot. We can target micro-audiences, worldwide, including the smallest geographies and most nuanced buying behaviors. Typically, clients are forced to turn to qualitative methodologies to fill these quotas. InstaConnect means they no longer have to.

What's the difference between InstaConnect and CATI?

NL: When it comes to quality, nothing. When it comes to cost, time and response rates, everything. Like CATI, InstaConnect finds the needle-in-the-haystack, just using advanced algorithms instead of phones to ensure respondents are who they say they are. But unlike CATI, InstaConnect is faster to field and costs exponentially less, due to a decrease in human resources needed to run projects. Additionally, InstaConnect meets targets where they are, when they're ready to participate. As it continues to grow more challenging to get people to answer their phones, InstaConnect provides a viable, proven alternative.

Will InstaConnect replace panels?

NL: No. For general B2B and B2C work at an efficient price, panels remain the way to go. InstaConnect is a premium product, used when strategic decision-making hinges on the opinions of targets that can't be found via panel. For clients wanting a faster, cheaper alternative to CATI—without sacrificing quality—InstaConnect is a game changer.

What's it like working with Full Circle?

NL: We hang our hat on our consultative service model. We are often called in as consultants for our clients' clients, as every team member is a seasoned industry vet. Experienced eyes watch every project every time, and your dedicated team is with you from start through project completion. It's why our many loyal clients have trusted us for a decade.



**Inc. Best
Workplaces**
2022

HEADQUARTERS

Greater Washington DC Area

- Shelton, CT
- New York, NY
- Baltimore, MD
- Atlanta, GA
- Santa Rosa Beach, FL
- Chicago, IL
- Houston, TX
- San Francisco, CA
- Los Angeles, CA
- Portland, OR
- Paris, France 🇫🇷



301-762-1972
iLoveFullCircle.com
TalkToMe@iLoveFullCircle.com