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Welcome to Insights Essentials

**Insights** is a new consumer intelligence and discovery platform that empowers clients with brand consumer messaging, cross-channel marketing, and media planning tactics. **Insights** will include advanced reporting analytics, data visualizations, and business intelligence applications with comprehensive profiling that will enable clients to build proprietary data dashboards and custom analyses quickly and easily.

**Insights** places actionable consumer insights at the users’ fingertips with intuitive functionality and an improved navigation flow. With **Insights**, the emphasis is on guiding the user to better insights and intelligence, and helping clients mine through vast amounts of data even faster than before.

**Insights** introduces our powerful consumer intelligence search engine, Smart Search, that searches through thousands of consumer behaviors in the blink of an eye.

The Insights platform supports a variety of functions. Within this User Guide, you will find detailed instructions on the functionality of:

- Smart Search
- Dictionary Search
- Quick Reports
- DataHaul
- Quick Reports
- Local Flexible Markets
- Functions and Definitions
- Brand/Media Consumers

For more information on our Catalyst products (Brand Catalyst and Sales Catalyst), please ask your Account Manager for that User Guide.
Insights
Sign-In Basics

Sign-In

https://simmonsinsights.com

Insights requires users to sign into the system using unique usernames and passwords.

FAQ: Where do I get my username and password?

Your username is your email address. You will receive an email with a link to set up your password once you are set up in the system by an administrator.

If you are a current OneView user, the username and password for Insights is the same one that you currently use to access OneView.

FAQ: What if I forget my password?

There is a Forgot Password feature on the sign-in page. You will be asked to enter your username, and will then receive an email with a link to reset your password.

FAQ: The system says I am locked out; what do I do?

If you attempt to enter too many incorrect passwords in a row, the system has a security feature to lock you out. If this happens, you will receive an email with a link to unlock your account. Be sure to check your junk email folder; if the email ends up in that folder, you may have to copy and paste the link from the email into your browser rather than clicking on it.

User Types

There are two main types of users in Insights: General User and Client Administrator.

General User: Must be assigned a seat to access specific functions and studies.

Client Administrator: Person at client who is responsible for setting up users and assigning users to seats.

Browsers Supported (PC only)

• Chrome: 60.0.3112 and above
• Firefox: 56.0 and above
Insights
Menu and Toolbar

The left-hand side of the top toolbar enables access to the various reporting options inside Insights:

- Within Essentials, there is access to Crosstab, Quick Reports, and DataHaul.
- The Catalyst tab gives access for Brand Catalyst (see Catalyst User Guide).
- The Edge tab is the gateway to building an Instant Edge (see Edge User Guide).

Additional functionality will be added under each of these tabs as the features are built out.

The right-hand side of the top toolbar gives the user access to additional functionality in Insights:

- **Resources:** Help and user guide information (coming soon).
- **Notifications:** (coming soon).
- **Feedback:** Provide comments to the Insights product team by section.
- **Administration:** Includes a drop-down menu to set user preferences, edit “my info,” change your password, switch accounts (if applicable), and to log out of an Insights session.
Insights Preferences

The Preference section can be accessed via the right-hand side of the top toolbar.

Once in Preferences, you can use the left-hand navigation to change the settings for individual modules.

Each module has different preference options. These will be detailed in the next several pages.
Insights Preferences: Essentials

Crosstab Preference options

- **Study on Start-up**: select the study within Crosstab that appears each time you initiate a new Insights session.
  - **Auto Update**: set platform to automatically override and update the existing study on start-up when a new study is released.
- **Crosstab Editor**: select the default layout, Smart Search or Dictionary Search, used to build your crosstab.
- **Bases on Export**: set your preferred base selections upon export.
  - **Study Universe**: indicates if the Study Universe is included or excluded in export.
  - **Selector Pop-up**: allows you to bypass the selector pop-up if you do not want it to show each time you click Export XLS on the left-hand pane.
- **Chart View**: you can determine the preferred display of Private Eye or Crosstab view within the Chart View type.
- **Metrics**: choose the metrics that appear by default when you run a Crosstab.

After clicking “Save & Apply,” your preference selection will be applied immediately and saved for future sessions.
Insights Preferences: Essentials

Quick Reports Preference options

• **Study on Start-up:** select the study within Quick Reports that appears each time you initiate a new Insights session.

DataHaul Preference options

• **Study on Start-up:** select the study within DataHaul that appears each time you initiate a new Insights session.

Note that both Quick Reports and DataHaul have the Auto update option available, which sets the platform to automatically override and update the existing study on start-up when a new study is released.

After clicking “Save & Apply,” your preference selection will be applied immediately and saved for future sessions.
Insights Tool Palette

The tool palette to the left of the main screen contains some selections and options for runs within the Insights tool.

The accordion arrow at the top enables the user to expand and contract the tool palette to increase screen real estate for analysis of data.

- **Open**: Open a previous crosstab or a saved .spc file.
- **Save**: Save your crosstab.
- **Share**: (coming soon)
- **Export**: Select your export format: Excel, CSV, or specification file (.spc).
- **Chart Type**: Private Eye, Crosstab, Quad Chart, or Trend.
- **View**: Toggle on and off the variables that you want to see on-screen for your crosstab. Enable highlighting and filtering. Includes “Clear All” option.
- **Grid**: Expand this to see the selected bases, columns, and rows in this specific run.
Smart Search is the default view when you open Simmons Insights.

- Users can filter smart searches by a particular category (purple box above) to begin the search within that category.
- Users may also begin typing in the second (blue) box without selecting a category to find all the terms that match.
  - Results will populate in the drop-down box. Scroll down to select.
  - Smart search gives you the ability to search for non-sequential words (ie, type "buy best" and get results that include Best Buy).
  - Smart search refines the values found based on each letter typed.
- When you do a smart search, there will be several types of answers that appear.
  - A blue checkmark indicates the answer. Select this to begin building your segment.
  - A red question mark indicates a question. Click on this to get the answer options for this question. Select one to begin building your segment.
  - A blue folder indicates that this is a category. If you click on this, you will be prompted to enter another search term to search within that category.
Insights
Smart Search

Drop-down menu to narrow your search to a particular category

Use search box to enter terms to search

Placement icons let you add your selection to your bases, columns, or rows

When an item is selected, you will see the sample size and weighted number (000) in red above your target.

Once you have added this to your row, column, or base, you will see it appear on the left in the tool palette.
Insights
Smart Search

To create a segment with a combination of variables, type in your first search term and hit enter once you find it. A drop-down menu will appear with options.

As you add other variables, the sample and weighted counts will change to that of the new segment.

Once you've built your segment, click the appropriate icon to add it to your base, column, or row.

To rename the segment, double-click on the segment in the side tool palette and type in the new name.

From here, you can edit the segment by double-clicking on the pen icon. This brings the segment back into the search bar where you can change any of the variables and add it back to your base, row, or column.
Insights
Smart Search

In Smart Search, adding multiple items requires some additional steps. You will need to hit CTRL or SHIFT and then begin selecting the items. When you select the items, they will turn dark blue.

To AND/OR the combination: The AND/OR option appears above the multiple selected items. If you wish to combine these items with AND/OR, select that option. This combination can be added to Columns, Rows, or Bases by using the icons.

To add multiple items to Columns, Rows, or Bases as individual items: Once you have selected the items, click on the appropriate icon above and to the top right of the items you have chosen. This will move these individually to the Column, Row, or Base.

Continue to add columns and rows until you have completed setting up the data you want to run.

Once you have your bases, columns, and rows all set up, click the arrow icon to run your crosstab.
Insights
Using Definitions in Smart Search

All your created, shared, and/or adopted definitions are also available to search in Smart Search.

You can access your definitions in Smart Search in one of two ways.

• In the category dropdown, your definitions can be selected and added to your columns, rows, and/or bases in the same way you can select question answers.
• Alternatively, you can search for the definition and definitions will appear at the bottom of your search results.

To search only definitions, you can select "Definitions" from the category dropdown.

Please note: this does not include the ability to create a definition in Smart Search. To create a definition, please switch to dictionary search. A definition created in dictionary search will then be usable in Smart Search.
Insights Tool Palette Expansion

When you have your crosstab in the viewing window, you can use these options on the left side tool palette to adjust what variables you see and how you want to export.

**Export:** Options include Excel (.xls), specification file (.spc), or comma-separated (.csv).

**Chart Type:** You can select to view the data numerically in either Private Eye (horizontal) or Crosstab (stacked) views. Additionally, you can look at your data in a quad chart (see page 15) or run a trend report (see pages 16-18).

**View:** You can toggle on/off the various metrics that you display within the data window. Note that whatever is displayed on the screen is also what will be exported.

With Clear All, you can remove all data points from your crosstab.

You can also highlight and filter your data from within this option.
The Grid expansion includes several sections for bases. There are three types of bases available for selection:

1. **Study Universe**: a base reflecting the total universe for the selected study.
2. **User-Defined**: all bases that the user has created and added to the crosstab during the current Insights session.
3. **Standard**: a selection of bases that are commonly used by our client base. These bases are study-specific and may change depending on the study you have selected. Standard bases cannot be edited or deleted.

By default, Insights will export the Study Universe and User-Defined bases unless the user changes the Preference selections (see Preferences on page 6 for more information).

The bases can be toggled on and off by using the selector for each base.
Insights Tool Palette: Bases

The bases to export selector allows you to determine which of your bases you would like to include in your Excel export.

- Upon clicking Export XLS in the left-hand pane of Insights, users will receive the below pop-up. Note, by default the selector is hidden and you must go to Preferences to turn on (see Preferences on page 6).

- All selected bases for export will be listed in the right-hand box and will be included in your export. The arrows in between the Available and Selected boxes will allow you to move your selected bases between the two areas.

- Blue text represents User-defined bases and red text represents Standard bases.

- The Study Universe can be included or excluded by clicking the circle to the left of the text.
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Insights Data View Pane

View of crosstab run in screen with tool palette minimized to show more data. If you want to see specifics, you can expand the tool palette and click on the GRID icon.

To save a crosstab, expand the tool palette and click on “Save Crosstab.”

If a crosstab with the same name already exists, you can overwrite the old version, or choose a new name.

To open a previously saved crosstab run, expand the tool palette and select Open Crosstab. Note that you will have to click the run icon to see the data from a saved crosstab.
Insights Data View Pane

You can set your default data view in the Preferences section (see page 7).

Private Eye view lays out the data points for each target vertically.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>12.1%</td>
<td>52.0%</td>
<td>1.5%</td>
<td>1.8%</td>
<td>1.6%</td>
<td>1.7%</td>
<td>1.7%</td>
</tr>
<tr>
<td>95.6%</td>
<td>95.6%</td>
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<td>100%</td>
</tr>
</tbody>
</table>

Crosstab view stacks the data points on top of each other.

Both of these chart types have color coding and conditional formatting to illustrate the size of the variables. To remove the colors, click the right icon. To change the highlighting and filtering rules (and enable alternative highlighting and filtering), click the left icon.

See page 19 for more information on filtering and highlighting.
Insights Quad Charts

Also available is the quad charts view, which enables you to look at the data in a more visual manner, and shows how two targets relate to each other across a set of data points.

Drop-down menus for each axis column enable you to switch between targets for the horizontal and vertical rows.

This interactive quad chart chart also lets you zoom in on a particular set of data points by using your mouse to draw a box around the selected set of variables. The window will then zoom in to show a more granular view.

To return to the full-screen view, click the Reset zoom box in the upper right hand corner of the quad chart.
Insights Trending

Also available through the Chart Type menu is the ability to trend across studies.

Set up your crosstab and click the run arrow. Once your data appears, go to the Chart Type menu and select Trend.

Select the studies that you want to trend. You can search using the box at the top of the list of studies. Add each to the trend box by clicking on the red arrow.

When you have added all your studies, click the Run Trend box in the bottom right corner.
The default view for the trend is a graph view. You can select your target with the drop-down box at the top of the chart.

You can also toggle the different chart variables on and off by clicking on their names in the “Trend Rows” legend to the left of the chart.

Select the radio button for Data View to switch to the stacked version.
Some tips on running trend reports:

1. The graph view will show the weighted (000) numbers. If you hover over any of the data points, you will see a pop-up with all the variables for that point.

2. Select the oldest study that you want to trend from first, as your base study.

3. The trend will use the base study as the “first” one on the left hand side of the chart.

4. The order in which you bring the other studies into the trend report does not matter. The software will order them chronologically.
Insights
Highlight and Filtering

The “Highlight and Filtering” option is within the View section on the Tool Palette as well as on the crosstab data screen.

When you click on the left icon, the screen to the right will pop up, enabling a number of highlighting and filtering options.

For text and background colors, you can select available colors or add your own hex or RGB colors to match your brand’s style guide.
Insights Dictionary Search

Selecting Dictionary Search at the bottom right corner of the Smart Search bar will bring you to the Dictionary Search view. Any work done in Smart Search carries over to this view, and vice versa. Dictionary Search allows you to view the entire Simmons data dictionary at once, and build segments by “dragging and dropping,” not clicking.

Dictionary Search Edit Pane

**Search Bar:** Enter text to search for a particular item.

**Dictionary Window:** Where the data dictionary lives. Click on the > to expand the section down to the question level.

**Answer Window:** When the Dictionary Window has been used to reveal the question, the answers to this question will appear in the answer window.

**Coding Box:** The coding box is used, along with logical operators, to create more complex targets.

**Columns:** The items from the dictionary about which you want to know more; also known as targets.

**Rows:** The items from the dictionary that define what you want to know about your target.

**Bases:** Enables comparison between different universes.
**Insights Dictionary Search**

Buttons above the Dictionary box enable the user to select the level of text searched. Selecting ALL will enable Category, Question, and Answer.

Logical operators are displayed to the right above the coding box. The most common operators are listed, and the more advanced are available via a drop-down menu.

This selection allows the user to toggle between the dictionary questions, a section with saved definitions, and the recycle bin, which holds discarded questions.

**Coding Box Buttons**

- **VERIFY**: Verifies that coding is correct.
- **DEFINE**: Enables a pop-up that translates the codes into questions/answers.
- **CLEAR**: Clears the entry from the coding box.
- **SAVE**: Lets user save the coding to a definition file.
Insights
Dictionary Search

Scratch Tab

The Scratch tab is useful when combining answers from multiple questions into a combined count coding. Locate the answers you wish to combine and drag them into the Scratch tab. Once the answers are there, select them all, right click the mouse, select Functions, and go to the Count tab.

Columns, Rows, and Bases

Items can be dragged to these rows from the Dictionary and Answer windows.

The number in parentheses after the section header indicates the number of items in that section.

For each line in your row, column, or base section, you will see the sample count and the weighted projection number, in thousands.

The X icon will delete all the entries within that section.

The up and down arrows can be used to rearrange the items within each section.
Dictionary Search allows you to view the entire data dictionary at once, and build segments by “dragging and dropping” instead of just clicking. As you can see, the same Columns and Rows we created in Smart Search also appear here.

Using the drop down menus on the left side of the screen, you can find data points you may need. The right side will populate with “answers” from a folder (in this case, Gender) and you can then drag anything into the Coding Box below (in this case, Female).

You can also use the search bar above the dictionary to search for any data point. It is recommended you search “All”, not just Answers or Questions & Answers.

Searching for “Yoga” will yield all dictionary folders in which Yoga appears. Note that you do not see what else appears in those folders – you will only see the data point you searched for.
Insights
Dictionary Search

Using the connectors above the right side of the coding box (Or, And, Not, Xor), you can build a segment just like we did in smart search. You can rename the segment in the upper left hand corner, and then select one of the icons in the bottom right corner to Move to Columns, Rows, or Bases.

Selecting “Verify” will confirm whether what you have put into the Coding Box is appropriate for adding to your crosstab. If what you have selected is not appropriate (eg, you forgot to add a connector like “And”), your coding box will be outlined in red. If it is ok, it will be outlined in green.

Selecting “Define” will show you all of the different data points in your coding box written out (shown below), which is especially useful if you have built long/complicated segments.

Selecting “Save” will allow you to save your segment to a Definitions folder, which is covered on the next page.
Insights Dictionary Search

Above the data dictionary is a tab labeled “Definitions”.

Here you can find folders with segments that have been pre-built for convenience, such as Generations (Millennials, Gen X, etc.)

You can also create your own folder by selecting “Create” in the top left corner. Name the folder, and select “Shared” to ensure that others (only those in your same account) will be able to access your segments if necessary.

Once a folder has been created, you can add your own segments by dragging them over from your Columns/Rows, or by selecting “Save” under the coding box as mentioned on the previous page.

To access definition folders created by someone else, select “Browse Shared” and a list of available folders will appear for you to choose to add to your dictionary search.
Insights
Dictionary Search

Anything you clear from your Columns, Rows, or Bases will appear in the Recycle tab – this includes any work you did with Smart Search if you select “Clear All” on the crosstab output (pg. 11)

However, it will only include data points you cleared during your current session. If you log out and log back in and open your saved Crosstab, your Recycle tab will be empty.

As with normal dictionary search functionality, you can simply drag and drop anything from the Recycle tab back over into your Columns/Rows/Bases.

For additional convenience, we have also included a “Scratch” tab, located in the top right corner above Columns. See page 22 for more on the Scratch tab.

Nothing you add to the Scratch tab will appear in your final crosstab output; it is meant as a place to hold data points from the dictionary in case you think you might need to use them later!
Insights
Dictionary Search

Clicking the red arrow in the top right hand corner of Dictionary Search will run your crosstab and provide an output just as with Smart Search.

If you want to return to the Smart Search view, simply click the “Smart Search” button, in the top right hand corner. DO NOT hit the back button on your web browser!
DataHaul is one of the functionalities available in the Essentials tab of Insights.

With this story-finding tool, you can compare and contrast up to 10 targets across all the variables measured within the study that is loaded.

DataHaul uses the Smart Search functionality to create targets, or you can use those previously saved in a definitions folder. Use this to create up to 10 targets. Add each of these targets to your rows. You also have the ability to add a base to your targets if you wish.

You will see these targets in the Grid section of the tool palette to the left of the screen as you add them.

Once you have selected your target(s), click the Run arrow. DataHaul runs on a remote server, so you will see different notification bar colors depending on the state of your run, along with the corresponding status in the status column.

When the report is ready, you will see the green 100% bar along with a notation that says “complete.” To open your DataHaul, click on the Download icon in the Actions box. From the Actions box, you can also click on the trash can icon to delete this run.

Note that DataHaul runs will be automatically deleted from the server after 10 days.
Insights

Quick Reports

Quick Reports are available in the drop-down menu under the Essentials tab.

The first two quick reports are available across all Simmons studies. All the quick reports are available for Simmons Connect Plus.

Within the tool palette on the left, there is an option to export to Excel all the underlying data for each Quick Report.

When you change the study to Simmons Connect Plus, all the quick reports are visible.
Insights Quick Reports

Quick Reports use Smart Search to build the target.

Once you have combined the desired items, use the icons to add the combination to either the base or the target.

Then select the quick report that you want to run, and click the arrow icon to run it.

The report will populate, and any required bases will be automatically added.

The Quick Reports have been reformatted with new icons and a new color scheme; however, the data reported is the same as the OneView reports.

The Dashboard button will bring you back to the Quick Report main screen. Clear All removes the base and the target and returns you to the main Quick Report screen.
Insights Quick Reports

The **Demographic Profile Report** shows demographic variables for the target.

These include:
- General statistics
- Education
- Ethnicity
- Race
- Household Income
- Age
- Gender

**General Statistics**
- Median Household Income: $69,324
- Median Age: 38
- Employed (Full or Part-Time): 64%
- Married: 40%
- Children in Household: 34%
- Homeowners: 63%
Insights
Quick Reports

The **Segmentation Report** shows segmentation breakdowns for the target. The user can switch between segmentation categories by using the drop-down menu at the top of this report, in the center of the screen.

The user can toggle between the pie chart and the index chart with the radio button.

Hovering over any of the segments will bring up a pop-up window that gives descriptive statistics about that segment, including sample, weighted estimate, vertical percent, and index.
Insights Quick Reports

The Time Spent Composition Report shows the breakdown of time spent, by percent and index, across the 11 platforms measured in Simmons Connect Plus.

The user can toggle between the vertical percent and the index with the radio button. Hovering over a column brings up a detailed pop-up box.

Clicking on any of the icons at the bottom of the bar chart brings up an icon-based report showing average time spent by medium over the last 7 days.
Insights Quick Reports

The Digital Activity Profile Report shows how the target interacts with the digital world around them.

<table>
<thead>
<tr>
<th>Digital Activity Profile</th>
<th>Sample</th>
<th>Weighted (000)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Adults</td>
<td>25,301</td>
<td>240,075</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Target Name</th>
<th>Sample</th>
<th>Weighted (000)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVENIENT (CABLE TV SERVICES VIEWED IN LAST 7 DAYS)</td>
<td>13,691</td>
<td>13,079</td>
<td>6.54%</td>
</tr>
</tbody>
</table>

- **Internet Location Access Most Often**
  - Library: 186
  - School: 185
  - Parks: 163
  - Restaurants: 149
  - Airports: 120
  - Home: 114
  - Work: 104

- **Internet at Home: Usage Access**
  - Television: 131
  - Cellphone or Tablet: 108
  - Computer: 105

- **Mobile Segment Composition**
  - Basic Planners: 26%
  - Mobile Professionals: 24%
  - Mobile Natives: 20%
  - Innovators: 15%
  - Social Connectors: 9%
  - Do Not Own Cell Phone: 4%

There is no toggle option on this report, but hovering over any of the images on the report will bring up a pop-up box that adds additional data points.
Insights
Quick Reports

The **Reach Report** shows how the target uses media, across the 11 cross-platform measures from Simmons Connect Plus.

The user can toggle between index and percent, and there is also a drop-down menu that allows the user to choose between 1-day, 7-day, and 30-day reach.

As with other reports, the user has the ability to hover over any of the data points in this report and see a pop-up box with more detailed information.
Insights Quick Reports

The **Incremental Reach Across Platforms Report** lets the user build a cross-platform incremental reach report by selecting any combination of platforms.

The graph portrays the reach of each platform by reach on the vertical axis and time spent in hours (for an average week) on the horizontal axis.

The table in the upper right hand corner shows the reach of each platform, the incremental reach added by each additional platform, and the total reach across all selected platforms.

As with other reports, the user has the ability to hover over any of the data points in the graph on this report and see a pop-up box with more detailed information about that particular platform.
Insights Quick Reports

The Media Activity Across Platform Report shows which activities the target does across various platforms. The activity is selectable via a drop-down box at the top center of the report. Only platforms where that activity is measured are shown.

The user can toggle between index and percent, via a radio button.

As with other reports, the user has the ability to hover over any of the data points in this report and see a pop-up box with more detailed information.
Insights
Quick Reports

The Media Platform Across Activity Report shows which platforms the target uses for various activities. The platform is selectable via a drop-down box at the top center of the report. Only activities where that platform is measured are shown.

The user can toggle between index and percent, via a radio button.

As with other reports, the user has the ability to hover over any of the data points in this report and see a pop-up box with more detailed information.
Insights
Quick Reports

The **Simultaneous Usage While Watching TV Report** shows activities that the target does while watching TV. There is a drop-down menu that allows the user to select one of five Likert scale values (Not at All to Very Often).

The user can toggle between index and percent, via a radio button.

As with other reports, the user has the ability to hover over any of the data points in this report and see a pop-up box with more detailed information.
Insights Quick Reports

The Day in the Life Report shows hour-by-hour use of activities on smartphones (or Mobile via radio button). The drop-down menu enables users to look at differences between different days and between weekdays and weekends.

The user can toggle between index and percent, via a radio button. With this report, the user can also toggle off individual activities to focus on those important to them.

As with other reports, the user has the ability to hover over any of the data points in this report and see a pop-up box with more detailed information.
Insights Quick Reports

The **Social Media Activity Profile Report** shows an overview of a target’s social media usage and top attitudes about social media.

As with other reports, the user has the ability to hover over any of the data points in this report and see a pop-up box with more detailed information.
Insights Quick Reports

The **Channel Category Report** shows website category usage across mobile, PC, and combined.

The user can toggle between the number of categories (from 5 to 20) with a radio button and can use the drop-down menu to select either last 7 days or last 30 days.

As with other reports, the user has the ability to hover over any of the data points in this report and see a pop-up box with more detailed information.
Insights
Quick Reports

The **Website Visitation Report** shows website category and site usage across mobile, PC, and combined. Users can access the drop-down menu at the top of the report to select either last 7 days or last 30 days.

The default view is by category, but the user can click on the folder next to the category name to show the top 10 sites (by %) within each category.

The Excel export of this report includes all the websites within each category.
SimmonsLOCAL Flexible Markets allows users to create custom geographies across borders, whether the user has 2 markets, all 209, or anywhere in between. It also enables users to compare targets across more granular geographies than the NCS.

The Flexible Markets studies can be selected from the study selector. Search for Flexible Markets and the list will populate with the available studies.

Select the appropriate study to begin.

Within the drop-down menu on the Smart Search page, you will see an entry that says Geographies. By selecting any of these geographies, you will limit your search to that particular geography.

If you do not want to narrow your search, you can search for any particular geography, including states, markets, counties, or zip code by typing your selection into the Smart Search bar.

Note that the Flex geographies are indicated by a snowflake icon to differentiate them from the geographies available in the National Consumer Study.
Important Notes:

Your Flexible Markets study will include only those markets to which you subscribe.

You will need to add a base to your crosstab before you can run it. What base you choose depends on what you want to see. For example:

- If you want to compare those people in the Flint, Michigan market to the rest of the state, you would add Flint to your columns and Michigan to your base.
- If you wanted to compare people in Flint to those in the Midwest, you could chose U.S. Census Regions: Midwest as your base.
- Or you can compare them to the United States as a whole, by combining all 4 census regions to create a custom US geography (a pre-coded “all markets” definition is coming soon).
- Note that your base can be comprised of both geographic and non-geographic variables, but it is a requirement that at least one geographic variable be included in the base.

The Flexible Markets study includes a new “IN” operator.

- All geographic combinations will be joined together with a new operator, “IN.” This is different than the AND, OR, etc. operators commonly used in other Simmons Insights crosstabs. This function tells the system to “include all respondents IN the chosen list of geographies.”
- Each geography level will receive a separate IN heading. Below are all the IN operators as you will see them in the coding box – the numbers represent the specific geographies.
  
  - Census Regions
    
    `INREGION ( 1 , 2 )`
  - States
    
    `INSTATE ( 9 , 10 )`
  - Markets
    
    `INMARKET ( 743 , 524 )`
  - Counties
    
    `INCOUNTY ( 50003 , 25003 ... )`
  - Zip codes
    
    `INZIP ( 31015 , 31072 )`

- When you aggregate different geographic levels, the different geography levels are joined together via OR, with the “IN” variable preceding each discrete geography level.
- If you want to create an “ALL MARKETS” base, you can go into the coding box and create INMARKET (0), until the All Markets base is implemented into Insights.
You can use Smart Search to create custom geographies by combining them in the coding box with OR, then clicking on the row, column, or base to add it to the appropriate place in your crosstab.

You can combine different types of geographies, including regions, states, markets, counties, and zip codes.

Within the Dictionary Search, you will see the Geographies tab between the Dictionary and Definitions tabs, which includes all the various geographies available within the Flexible Markets data.

Clicking on the arrow will expand each geography, at which point you will be able to drag them to the bases, rows, columns, or coding box to create your geographies within the Flexible Markets Study.

To set up your data run using Dictionary Search, you can treat the geographies just like any other variable.
Importing Geographies

- Within the Flexible Markets study, there is an IMPORT feature, which allows geographies to be imported via a text or CSV file directly into the Definitions tab.
- Note that any geography can be imported as a definition file.

To use this feature (available within Dictionary Search only):

- Go to the Definitions tab
- Click on Import
- Import Custom Geography

- This pop-up will appear.
- Browse for the file name.
- The geographies must be listed in a .txt or .csv file format.
- The file should have a TITLE at the top, and the list of geographies below this.
- After browsing for the file, you can save to an existing definition or create a new one.
- You will then see a new definition file with that title.

- Your imported geography will come in as a list of geographies – they will be listed individually and you can create an aggregated area by combining them.
Running your crosstab with Flexible Markets

Within the viewer, you will see your base, columns, and rows listed in the tool palette along the left side.

All the indices within this crosstab are in comparison to the base – in this case, New Jersey.

Be aware that, because of the way Flexible Markets works, you may see some of the following within your crosstab:

- Not Valid: displays when a crosstab is generated with variables that are not available in ALL the geographies selected.

- Empty horizontal%/index: if your base includes geographies where that data element is not available in every geography, the individual geographies listed in columns or rows will not display any values for vertical %, horizontal %, or index.

- Numerical zeroes in Retail/Dining categories: this is displayed when the store has no shoppers for the measured time period or the retailer/restaurant has no physical locations in the geography selected.
Insights Basics

To Create a Simple Crosstab
1. Select your study
2. Using Smart Search or Dictionary Search, move items into Columns, Rows, and Bases.
3. Click the Arrow to run the crosstab.
4. Go to the crosstab view pane.
5. Save your crosstab.

To Share Crosstabs Between Users
1. Set up and run the crosstab as above.
2. Name and save your crosstab.
3. In the tool palette on the left side, click on Export and select Export .SPC.
4. Send this file to another user.
5. The receiving user should first clear any data in their Simmons Insights tool and select the correct study.
6. They should then select Import .SPC to import the crosstab settings.
7. The receiving user can then run this crosstab.

Data types
There are two types of data: Logical and Numeric. The vast majority of the data in studies is logical (ie, “Yes” or “No”). These are identified with a checkmark in the answer window. Numeric data is an actual number and is indicated with a # symbol in the answer window. Numeric tends to be items such as Average Readers Per Issue.
Insights

Functions

Functions: Average, Count, Volume, N-Tile

Sometimes a function is needed to accurately measure a target. This feature is accessed via pop-up menu.

1. Highlight a selection of answers.
2. Right click
3. Select Functions in the pop-up menu.

From here, the user can set up four different types of built-in functions: Average, Count, Volume, and N-Tile.

Built-in Functions

Each function is coded by a function name (example: Volume) followed by a set of parameters enclosed in parentheses. Parameters consist of comma-delimited value pairs. Each pair consists of a keyword and a midpoint. The midpoint is usually derived from the dictionary, but it can be manually entered as well. The manual override of the midpoint can be done by typing the value directly in the coding box.

<table>
<thead>
<tr>
<th>Function</th>
<th>COUNTRANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Count Coding</td>
</tr>
<tr>
<td>Format</td>
<td>COUNTRANGE (keywords, nLower, nUpper)</td>
</tr>
<tr>
<td>Example</td>
<td>COUNTRANGE (AROBICYR, FLWKYR, YOGAYR, 2, 3)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Function</th>
<th>MEANSCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Average: Mean</td>
</tr>
<tr>
<td>Format</td>
<td>MEANSCORE (keyword, midpoint)</td>
</tr>
<tr>
<td>Example</td>
<td>MEANSCORE (LOTACR10, 10, LOTACR6, 8, LOTACR4, 5, LOTACR2,3)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Function</th>
<th>MEANSCORENOZERO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Average: Mean, Exclude Zeros</td>
</tr>
<tr>
<td>Format</td>
<td>MEANSCORENOZERO (keyword, midpoint)</td>
</tr>
<tr>
<td>Example</td>
<td>MEANSCORENOZERO (LOTACR10, 10, LOTACR6, 8, LOTACR4, 5, LOTACR2,3)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Function</th>
<th>MEANSCORENONULL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Average: Mean, Exclude Nulls</td>
</tr>
<tr>
<td>Format</td>
<td>MEANSCORENONULL (keyword, midpoint)</td>
</tr>
<tr>
<td>Example</td>
<td>MEANSCORENONULL (LOTACR10, 10, LOTACR6, 8, LOTACR4, 5, LOTACR2,3)</td>
</tr>
</tbody>
</table>
### Insights Functions

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
<th>Format</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MEDIAN</strong></td>
<td>Average: Median, Continuous</td>
<td>MEDIAN (VOLUME (keyword, midpoint))</td>
<td>MEDIAN (VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3))</td>
</tr>
<tr>
<td><strong>MEDIANNOZERO</strong></td>
<td>Average: Median, Continuous, Exclude Zeros</td>
<td>MEDIANNOZERO (VOLUME (keyword, midpoint))</td>
<td>MEDIANNOZERO (VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3))</td>
</tr>
<tr>
<td><strong>MEDIANDISCRETE</strong></td>
<td>Average: Median, Discrete</td>
<td>MEDIANDISCRETE (VOLUME (keyword, midpoint))</td>
<td>MEDIANDISCRETE (VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3))</td>
</tr>
<tr>
<td><strong>MEDIANDISCRETENOZERO</strong></td>
<td>Average: Median, Exclude Zeros, Discrete</td>
<td>MEDIANDISCRETENOZERO (VOLUME (keyword, midpoint))</td>
<td>MEDIANDISCRETENOZERO (VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3))</td>
</tr>
<tr>
<td><strong>NTILE</strong></td>
<td>N-Tile Sample</td>
<td>NTILE (VOLUME (keyword), # of Groups, Selected Group)</td>
<td>NTILE (VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3)4,2)</td>
</tr>
<tr>
<td><strong>NTILEWT</strong></td>
<td>N-Tile Weighted</td>
<td>NTILEWT (VOLUME (keyword), # of Groups, Selected Group)</td>
<td>NTILEWT (VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3)4,2)</td>
</tr>
<tr>
<td><strong>VOLUME</strong></td>
<td>Volume</td>
<td>VOLUME (keyword, midpoint)</td>
<td>VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3)</td>
</tr>
</tbody>
</table>
Insights
Functions

Note: When calculating using a volume function (VOLUME, NTILE, MEDIAN), answers of “Zero” and “None” will be included. A zero / none answer is any answer of “None” or “0” for a number. If it is not desired for 0 elements to be part of the percentage, these items must be left out of the expression.

To Create an Average (Median) Variable
1. In the window (Answer, Scratch, Rows, Columns), select the items you wish to average
2. Right click the mouse and select Functions in the pop-up menu
3. Select Mean or Median and whether zeros are to be included in the average
4. Give the average a title
5. Use the Move To buttons to place the average in the desired location

To Create a Count Variable
1. In the window (Answer, Scratch, Rows, Columns), select the items you wish to average
2. Right click the mouse and select Functions in the pop-up menu
3. Go to the count tab
4. Set the upper and lower bounds
5. Give the count a title
6. Use the Move To buttons to place the count in the desired location

To Create a Volume Variable
1. In the window (Answer, Scratch, Rows, Columns), select the items you wish to average
2. Right click the mouse and select Functions in the pop-up menu
3. Go to the Volume tab
4. Give the volume a title
5. Use the Move To buttons to place the count in the desired location

To Create an N-Tile Variable
1. In the window (Answer, Scratch, Rows, Columns), select the items you wish to average
2. Right click the mouse and select Functions in the pop-up menu
3. Go to the N-Tile tab
4. Enter values for number of groups and selected group
5. Select if this applies to Sample or Weighted values
6. Give the N-Tile a title
7. Use the Move To buttons to place the average in the desired location
Definitions are contained inside of folders. There are three types of definition folders:

- **Global Folder:** These contain common targets that are available to everyone using Insights. They are provided by MRI-Simmons and cannot be modified by end users.

- **Shared Folder:** Folders that are shared across accounts.

- **General Folder:** Standard storage location for users.

The Create, Edit, Duplicate, and Delete Buttons act on the selected definition folder.

Browse Shared is where you can adopt folders shared by others in your account. You can only copy these folders and cannot update them; only the original owner can make changes.
Insights Definitions

How do I use definitions?

Definitions are an excellent place to store items that you use frequently. By placing them in the Definitions, you avoid having to re-code them or find them again in the Dictionary.

To create a new Definition folder
1. Open the appropriate study.
2. Go to the Definitions tab.
3. Click on the Create Definition button.
4. Enter a name for the folder.
5. Select whether the definition is to be specific to this study and also if it should be shared across your organization.
6. Click OK button.
7. Go to the Questions tab and locate the items in the dictionary that you wish to store in Definitions.
8. Highlight the items.
9. Right click the mouse and select Add to Definitions.
10. Select the Existing Definition option
11. In the drop-down list, select the folder that you created previously.

To use items stored in a Definitions folder
1. Go to the Definitions tab
2. Open the desired folder
3. Drag the items from the folder to the Column, Row, or Base.
Insights
Brand/Media Consumer Segments

**Brand Consumers:** is the aggregate of consumers that selected the brand as one that they consume/use when completing the survey. The most common instance is in the example of Most Often and Also. In the past, clients have to OR together the respondents that selected “Most Often” with those that selected “Also” to get a larger sample size to analyze the brand. The rationale behind this decision is that if someone consumes the brand, then the client wants to understand the consumer in general, regardless of frequency of consumption, amount consumed, or preference for that brand over another. In some instances a brand does not have “Most Often” or “Also” as a response. Instead it has a frequency for being “shopped in” or a time period for making a purchase. These selections are available for stores. In this case consumer is made up of every instance where the respondent can indicate the frequency they shopped in the store, the last time they shopped in the store or if they made a purchase at the store.

<table>
<thead>
<tr>
<th>Sample Size</th>
<th>Vertical %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,150</td>
<td>23,866</td>
</tr>
</tbody>
</table>

**Media Consumers:** is made up of every instance where a respondent could have indicated they consume media content. We specify content since at the moment there are fewer instances where a respondent could have selected the medium, channel, connection method/provider, or platform. In the case of media content, we aggregated every instance where the respondent consumed the content. This means syndicated (regardless of day of week or time of day) as well as broadcast/cable. The reasoning behind this is that, in general, consuming specific content, regardless of channel, gives insight into the persona of that viewer: their interests, what defines them, their behaviors, and their motivations.