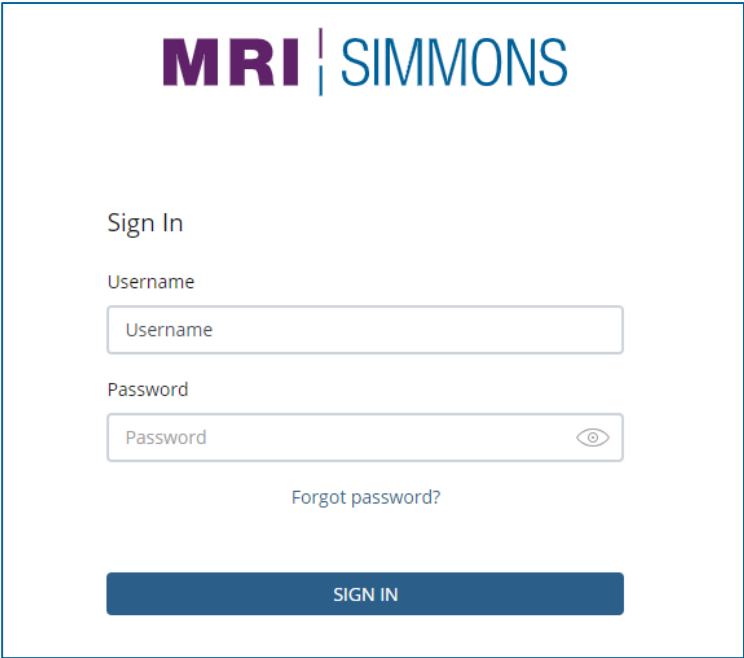


Simmons Insights User Guide



The screenshot shows the login interface for Simmons Insights. At the top is the MRI | SIMMONS logo. Below it is the text "Sign In". There are two input fields: "Username" and "Password". The "Password" field includes a toggle icon (an eye) to show or hide the password. Below the password field is a link for "Forgot password?". At the bottom is a dark blue button labeled "SIGN IN".

Table of Contents

Section	Page
Welcome to Simmons Insights	3
Sign-In Basics	4
Menu and Toolbar	5
Preferences	6
Tool Palette	7
Smart Search	8-12
Tool Palette Expansion	13-15
• Bases	14-15
Data View Pane	16-22
• Quad Charts	18
• Trending	19-21
• Highlight and Filter	22
Dictionary Search	23-30
DataHaul	31
Quick Reports	32-46
SimmonsLOCAL Flexible Markets	47-51
• Importing Geographies	50
Instant Edge (beta)	52-59
Brand Catalyst	60-78
• Explorer	61-67
• Reporter	68-70
• Creator (beta)	71-76
• Deep Dive Functionality	77-78
Sales Catalyst (beta)	79-99
• Target	80-84
• Package	85-90
• Compare	91-96
• FAQs	97-99
Brand/Media Consumer Segments	100-101
Simmons Insights Basics	102
Functions	103-105
Definitions	106-107

Welcome to Simmons Insights

Simmons Insights is a new consumer intelligence and discovery platform that empowers clients with brand consumer messaging, cross-channel marketing, and media planning tactics. **Simmons 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.

Simmons Insights places actionable consumer insights at the users' fingertips with intuitive functionality and an improved navigation flow. With **Simmons 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.

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

With this update of **Simmons Insights**, we are proud to introduce new and updated functionality, including:

Simmons Insights

- Insights now includes Standard Bases, a curated selection of commonly used bases available on all Crosstab runs
- This release introduces the Bases to Export Selector, a new feature that allows users to select the desired bases to export
- Preferences is a new dedicated section for users to customize settings for use within Insights
- User experience updates
 - In Dictionary Search, we have added a breadcrumb similar to the Smart Search component that lists the module, sub-module, and study that user has selected
 - Previously released: In Dictionary Search coding box, when variable(s) are added to a coding box that already has variable(s) included, it will now append the new variable(s) to the existing ones. Previously, the old variables were overridden.

Brand Catalyst

- Brand Catalyst Explorer view will now allow the user to deep-dive curated data sets while remaining on the Explorer screen

Sales Catalyst

- Sales Catalyst Compare view now includes a Strengths/Weaknesses chart for assessing an entity against its competitors

Future releases of **Simmons Insights** will expand the capabilities of this new tool, adding the ability to build proprietary data dashboards; integrated geo-mapping tools; our Multi-Media Engagement module; correspondence mapping and cluster analysis; along with many other enhancements.

Simmons Insights Sign-In Basics

Sign-In

<https://simmonsinsights.com>

Simmons 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 Simmons OneView user, the username and password for Simmons 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 Simmons Insights: General User and Client Administrator.

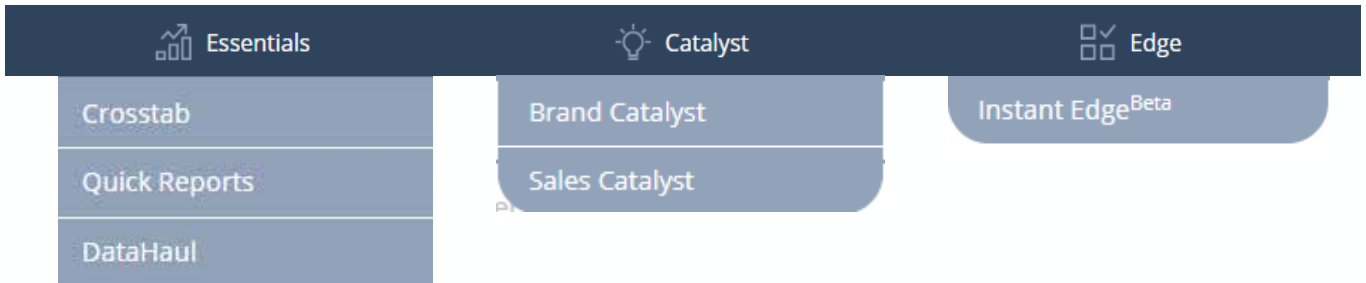
General User: Must be assigned a seat to access specific functions and studies.

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

Simmons Insights Menu and toolbar







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

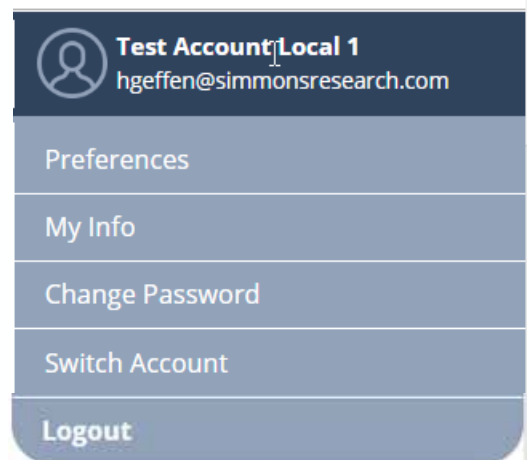
- Within Essentials, there is access to Crosstab, Quick Reports, and DataHaul.
- The Catalyst tab gives access for Brand Catalyst.
- The Edge tab is the gateway to building an Instant Edge.

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



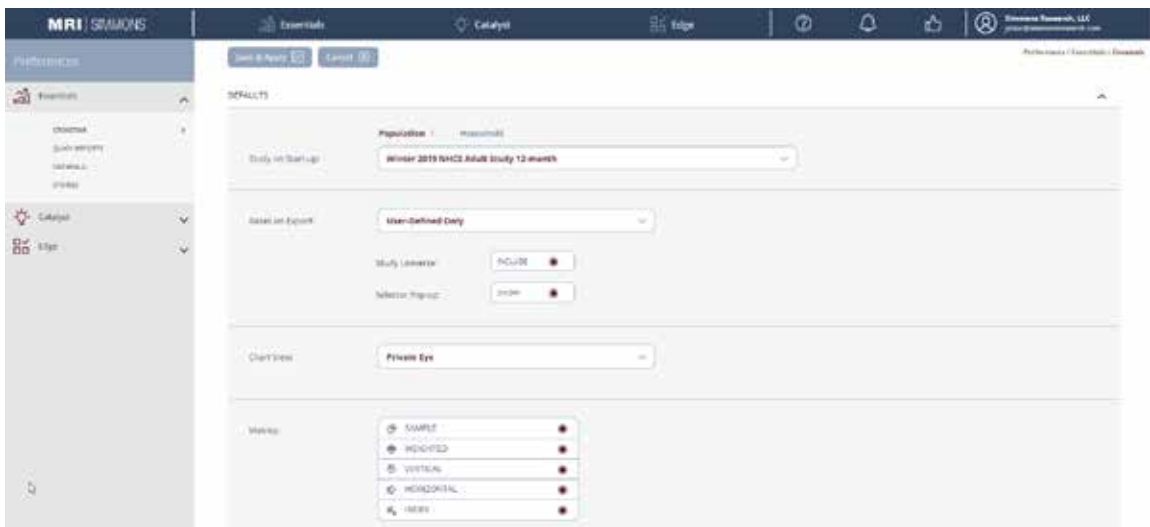
The right-hand side of the top toolbar gives the user access to additional functionality in Simmons Insights.

-  **Resources:** Help and user guide information (coming soon).
-  **Notifications:** (coming soon).
-  **Feedback:** Provide comments to the Simmons 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 a Simmons Insights session.



Simmons 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.



Crosstab Preference options

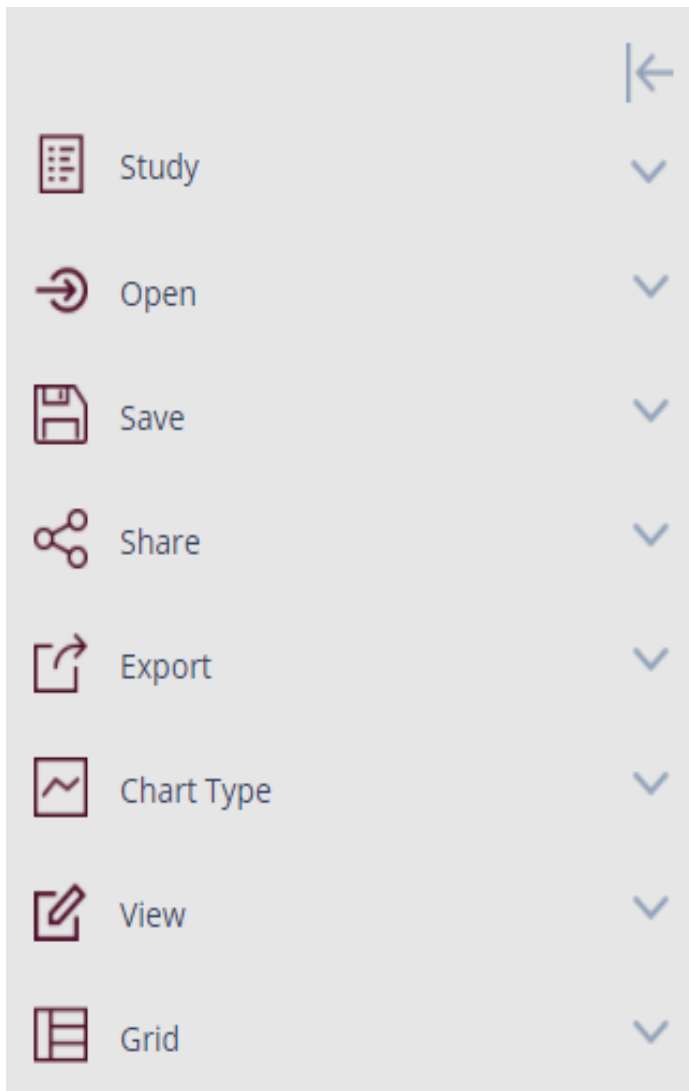
- **Study on Start-up:** select the study within Crosstab that appears each time you initiate a new Insights session.
- **Bases on Export:** set your preferred base selections upon export.
 - **Study Universe:** indicates if the Study Universe is included or excluded in export
 - **Selector Pop-up:** 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.

Simmons Insights Tool palette

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

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



Study selection: All available studies will be listed in a drop down menu here.

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.

Simmons Insights Smart Search



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.

Simmons Insights Smart Search

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



Use search box to enter terms to search

Use CNTRL or SHIFT to select multiple items



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.

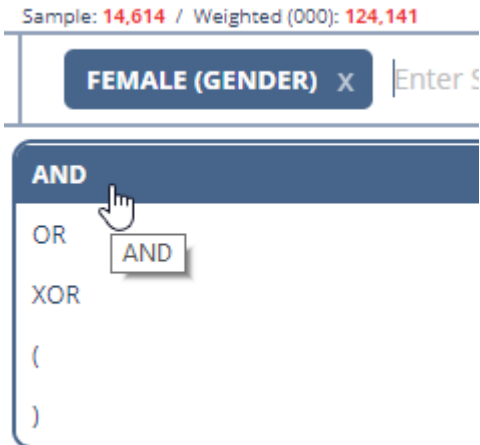
Sample: **4,349** / Weighted (000): **38,214**

I LOVE TO KEEP UP WITH CELEBRITY NEWS AND GOSSIP (ATTITUDES (GENERAL) - ANY AGREE) X



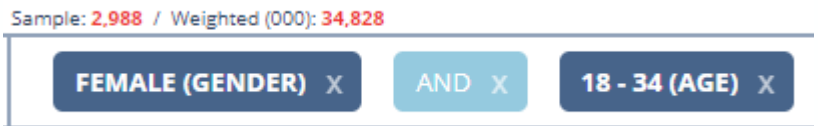
Once you have added this to your row, column, or base, you will see it appear on the left in the tool palette.

Simmons 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.

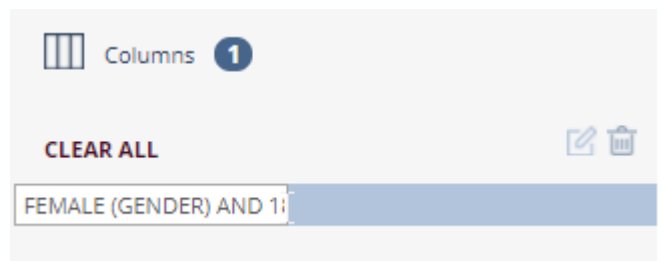
As you add other variables, the sample and weighted counts will change to that of the new segment



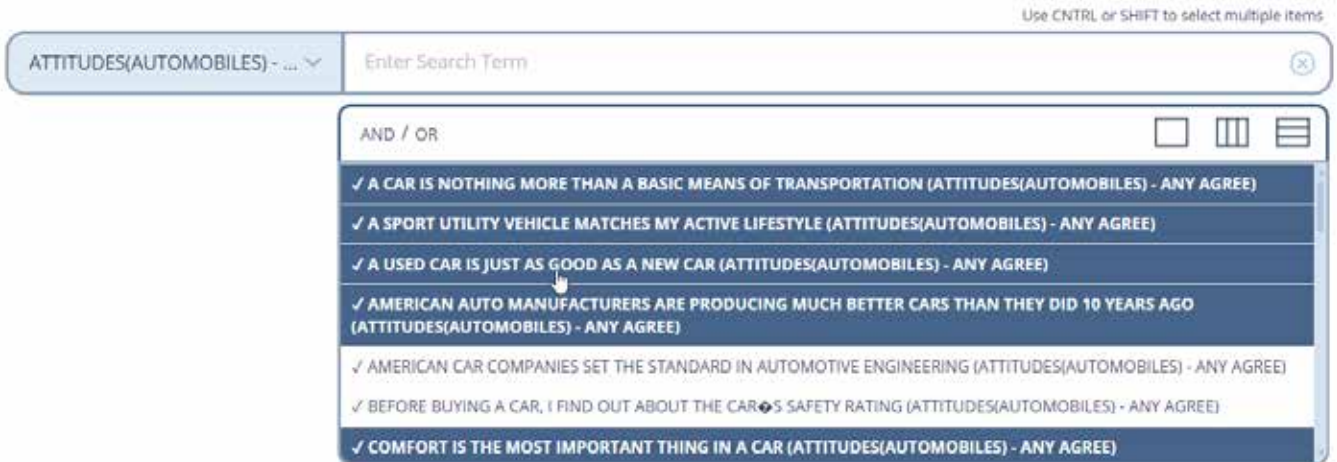
Once you've built your segment, click the appropriate icon to add it to your base, column, or row.

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.



Simmons 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

Simmons Insights Using definitions in Smart Search

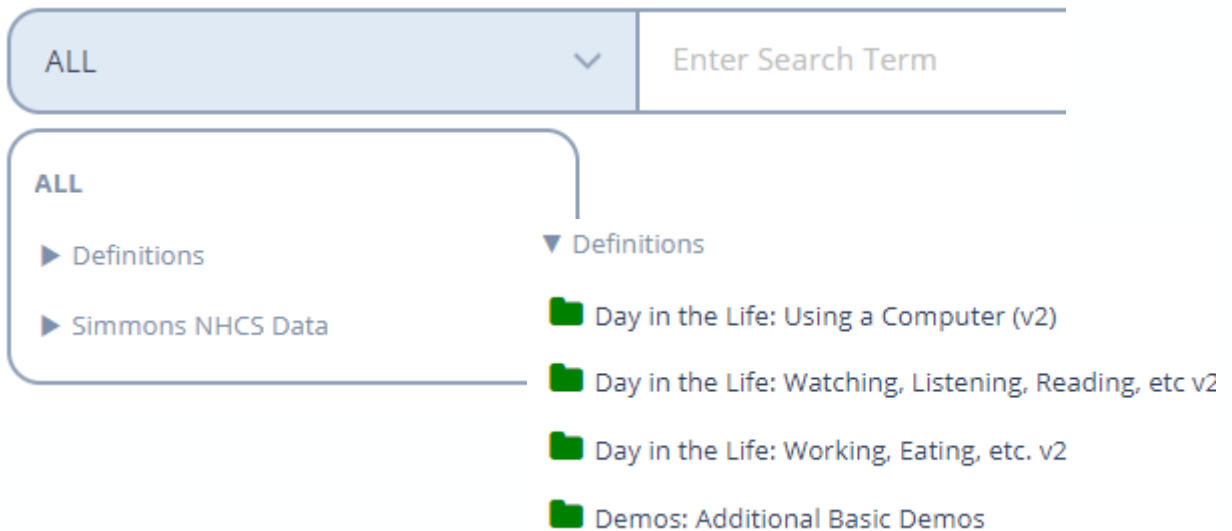
All your created, shared, and/or adopted definitions are also available to search in Smart Search.

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.



Simmons 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.

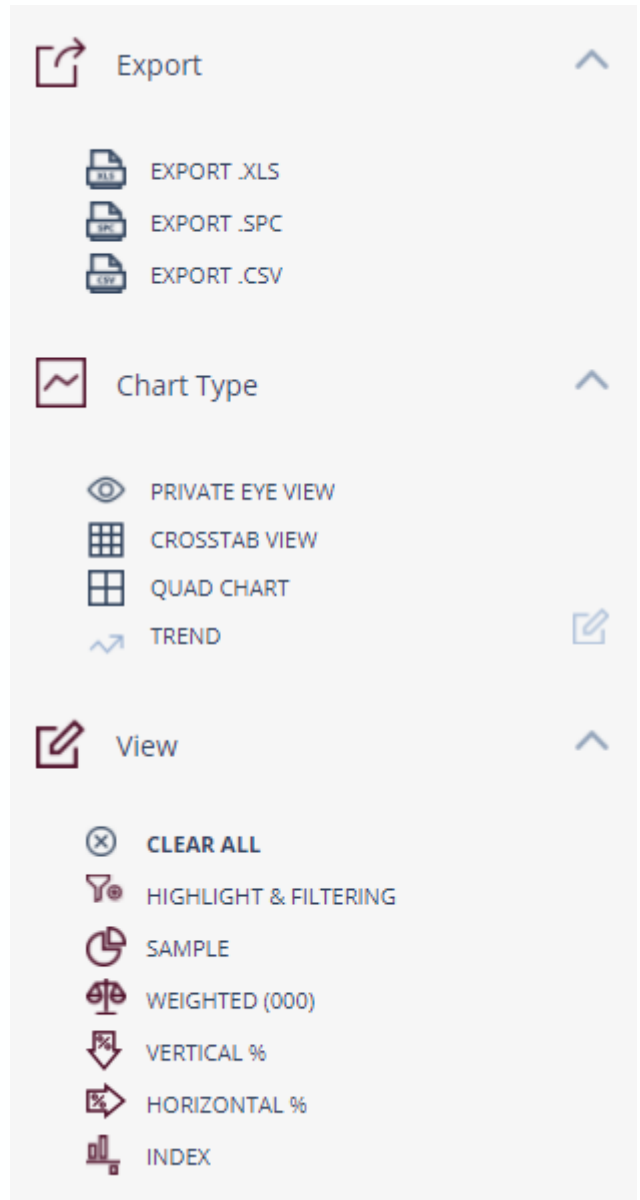
Export: Options include Excel (.xls), specification file (.spc), or comma-separated (.csv).

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.



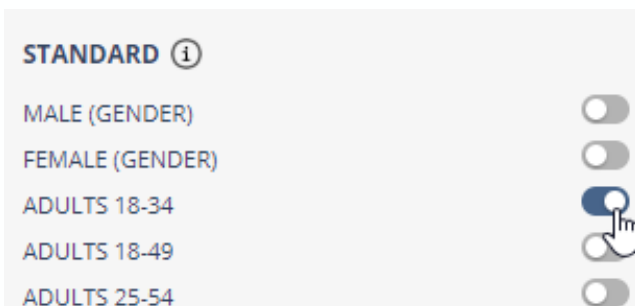
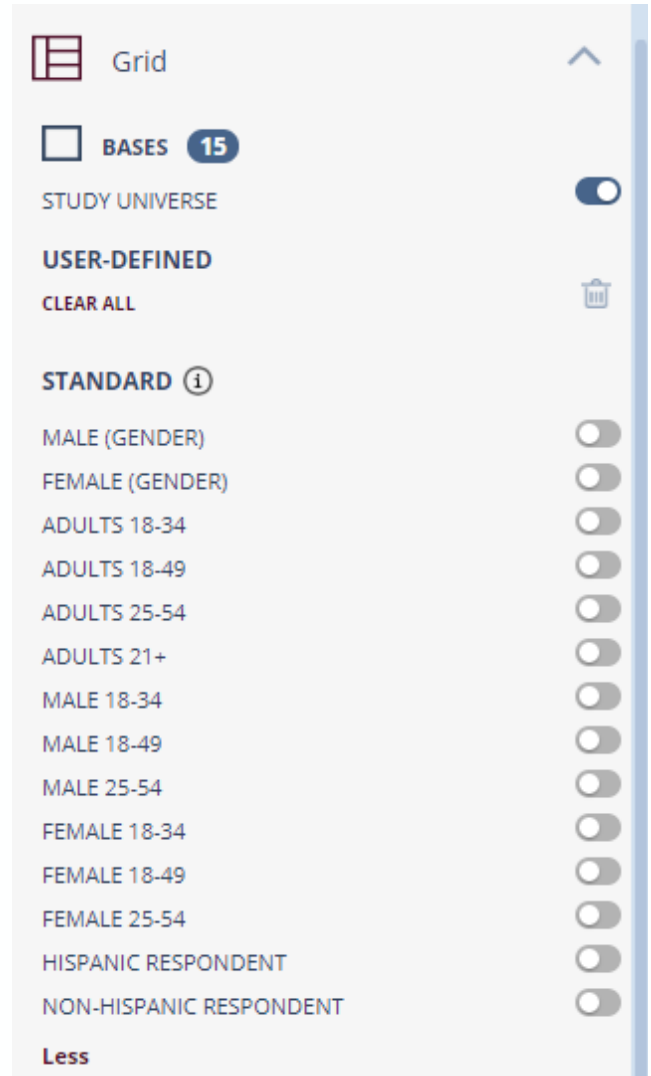
Simmons Insights Tool palette: bases

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).

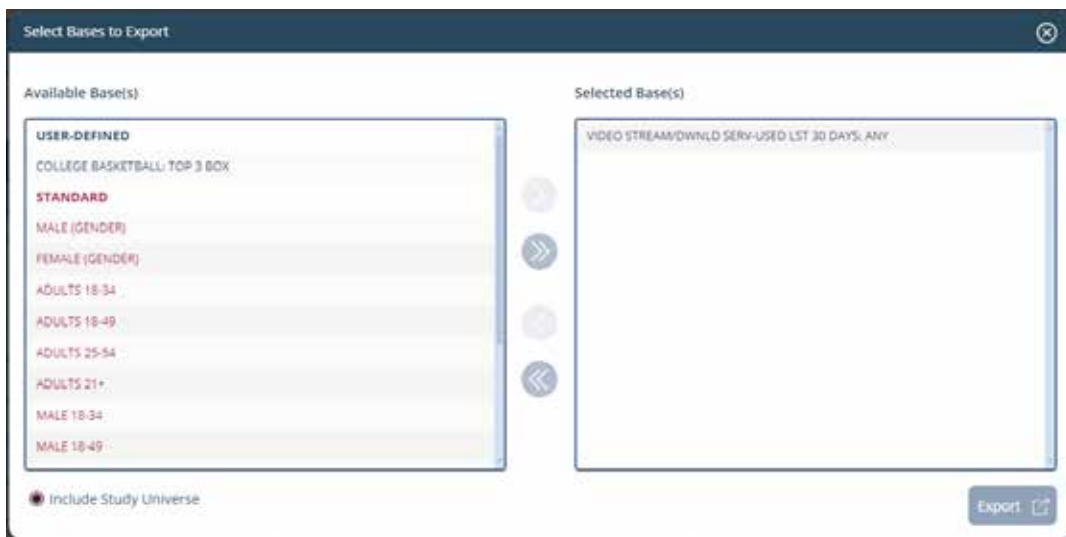
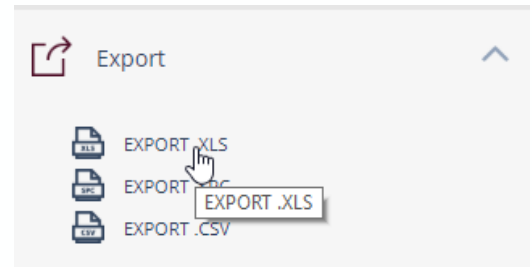
The bases can be toggled on and off by using the selector for each base.



Simmons 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).



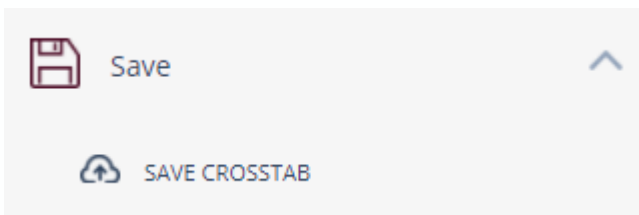
- All selected bases for export will be listed in the right-hand box and will be included in your export. The arrows in between the Available and Selected boxes will allow you to move your selected bases between the two areas.
- Blue text represents User-defined bases and red text represents Standard bases.
- The Study Universe can be included or excluded by clicking the circle to the left of the text.



Simmons Insights Data View Pane

Item	TOTAL					PART THE ESSENTIALS					STATUS STRINGS				
	SCORE	PERCENT	CUSTOMER	RESEARCH	MARKET	MARKET	MARKET	CUSTOMER	RESEARCH	MARKET	MARKET	CUSTOMER	RESEARCH	MARKET	
TOTAL	21,188	21,188	100%	100%	100	3,483	32,202	100%	71.2%	100	4,220	43,887	100%	13.7%	
I ENJOY TAKING RISKS	7,288	34.4%	34.2%	100%	100	375	3,817	32.2%	92%	10	1,588	17,887	38.2%	30%	
IM VERY HAPPY WITH MY LIFE AS IT IS	16,112	76.1%	84%	100%	100	2,248	37,224	46.3%	73.2%	100	2,878	30,121	68.2%	31.3%	
I FEEL SPENDING TIME WITH MY FAMILY	20,294	95.8%	83.4%	100%	100	3,488	37,348	46.3%	73.2%	100	3,807	36,421	81%	39%	
I WANT TO ENJOY LIFE AND NOT WORRY ABOUT...	11,688	55.2%	44%	100%	100	3,388	7,143	44.2%	71.4%	85	1,587	21,381	42.4%	38.2%	
WEALTH IS THE BEST MEASURE OF SUCCESS	3,117	14.7%	21.7%	100%	100	311	3,647	22%	78.4%	10	38	3,609	22.2%	17.2%	
I ONLY GO HOME AT MY CURRENT JOB FOR THE...	3,641	17.2%	24.2%	100%	100	339	3,821	23.8%	72.1%	11	1,816	38,228	32.7%	31.2%	
I PREFER TO SPEND A QUIET EVENING AT HOME...	14,664	69.2%	64.4%	100%	100	3,894	39,221	71.7%	75.4%	118	2,497	28,882	65.8%	37.7%	
IF I FEEL STRONGLY ABOUT AN ISSUE I WOULD P...	8,384	39.6%	22.7%	100%	100	381	7,834	35.2%	83%	47	1,284	12,318	23.2%	18.8%	
HOW I SPEND MY TIME IS MORE IMPORTANT TH...	13,342	62.9%	56.6%	100%	100	3,913	37,441	61.8%	71.7%	68	2,884	28,871	37.2%	38.8%	
IT IS MORE IMPORTANT TO DO YOUR DUTY THA...	8,218	38.8%	38.8%	100%	100	1,284	31,887	35.3%	71.4%	107	1,281	12,211	28.7%	14.8%	
I AM WILLING TO SACRIFICE TIME WITH MY FAMIL...	8,112	38.3%	21.7%	100%	100	371	8,311	28.4%	78.8%	22	881	8,881	21.7%	13%	

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.

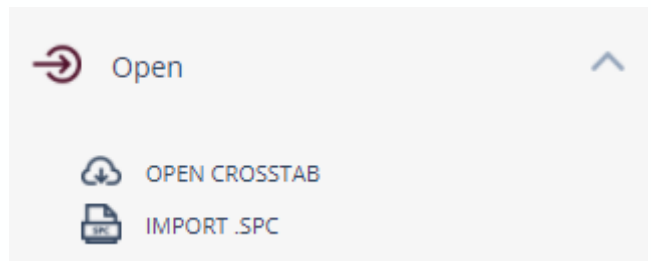


To save a crosstab, expand the tool palette and click on "Save Crosstab."



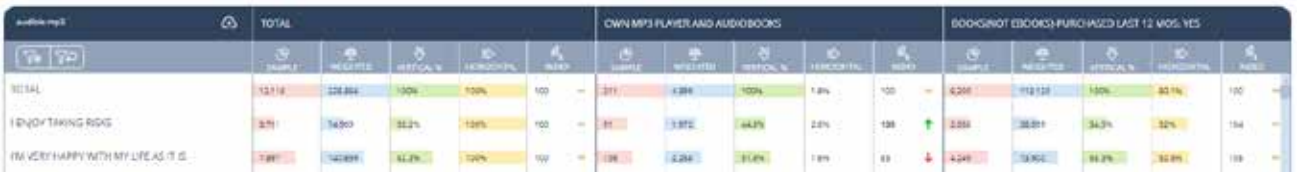
If a crosstab with the same name already exists, you can overwrite the old version, or choose a new name.

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.



Simmons Insights Data View Pane

The default chart type in Simmons Insights is Private Eye view, which lays out the data points for each target vertically.



Also available is Crosstab view, which stacks the data points on top of each other.



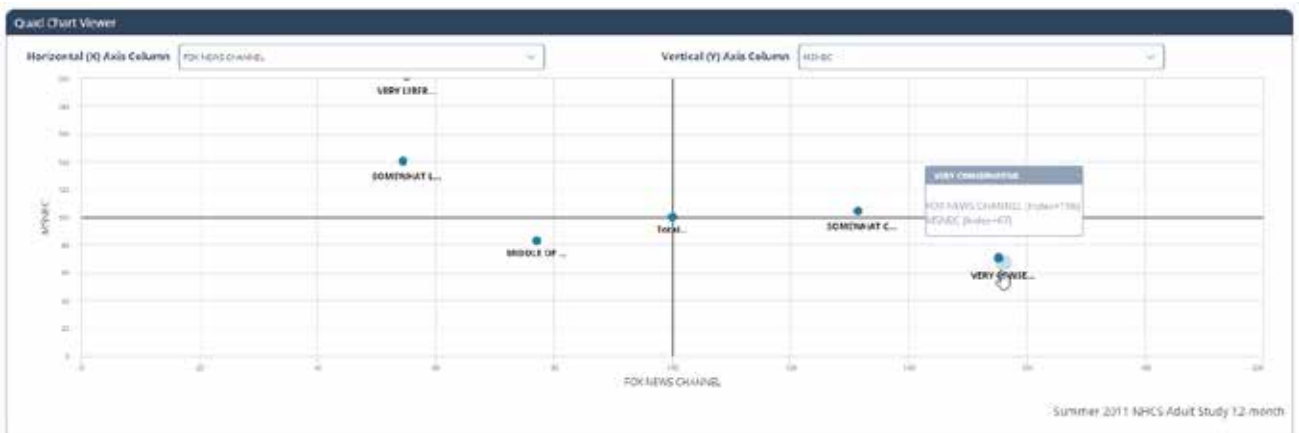
Both of these chart types have color coding and conditional formatting to illustrate the size of the variables. To remove the colors, click the right icon. To change the highlighting and filtering rules (and enable alternative highlighting and filtering), click the left icon.



See page 19 for more information on filtering and highlighting.

Simmons 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.



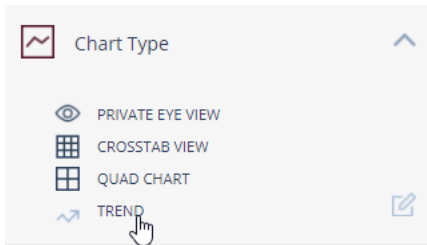
This interactive quad chart chart also lets you zoom in on a particular set of data points by using your mouse to draw a box around the selected set of variables. The window will then zoom in to show a more granular view.

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



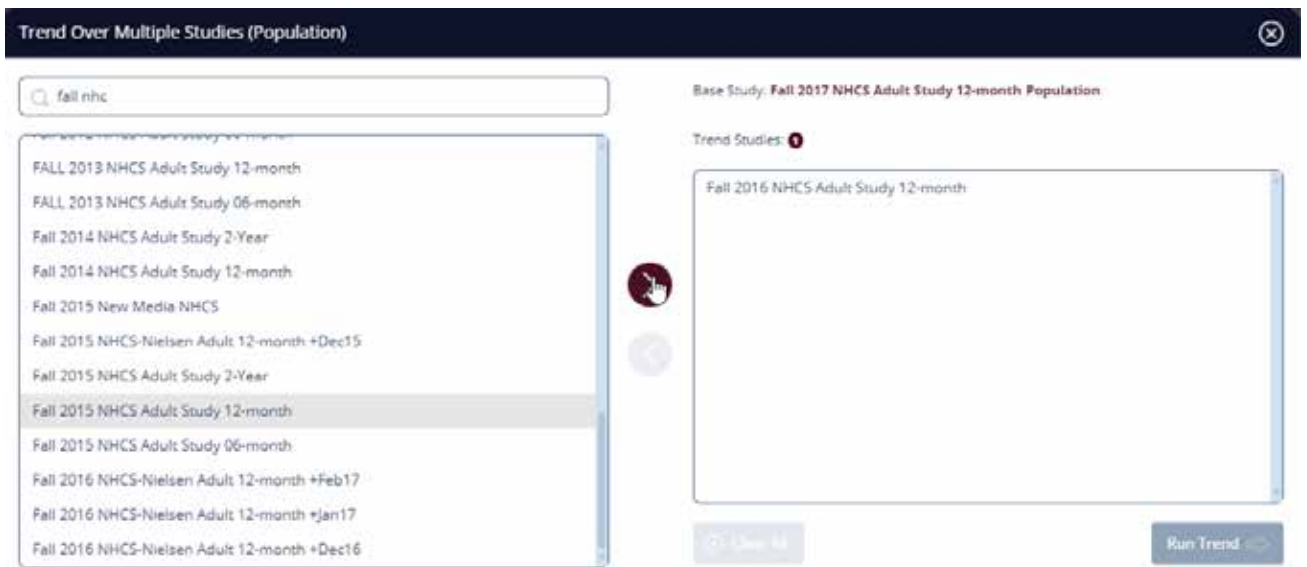
Simmons Insights Trending

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.

Simmons Insights Trending

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.

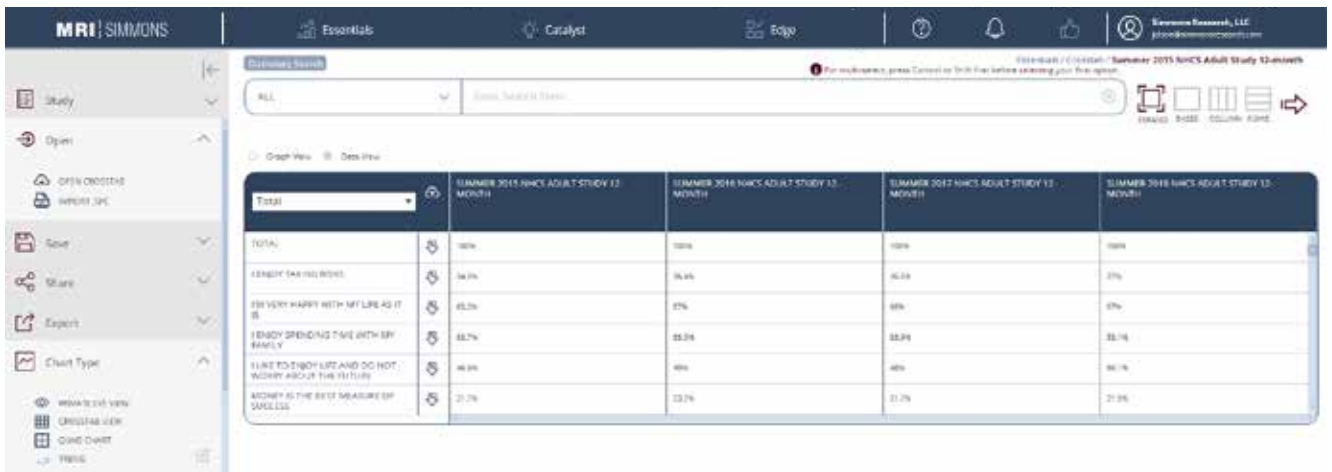


Select the radio button for Data View to switch to the stacked version.

	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017
TOTAL	25,889	25,498	25,428	26,878	24,727
SIGNIFICANTLY WORSE OFF	2,814	2,718	1,874	3,758	1,884
SOMEWHAT WORSE OFF	4,408	4,888	4,811	6,748	4,840
ABOUT THE SAME	7,477	10,028	15,228	18,374	8,209
SOMEWHAT BETTER OFF	8,734	8,022	8,221	8,247	9,984
SIGNIFICANTLY BETTER OFF	784	188	88	784	1,828

Simmons Insights Trending

You can toggle on and off variables within the trend report by opening up the view menu and selecting sample, weighted (000), or vertical %.



Some tips on running trend reports:

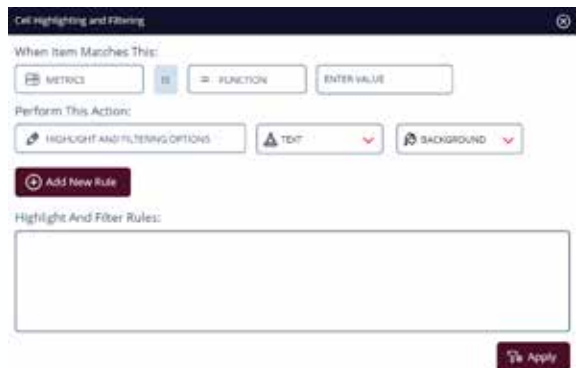
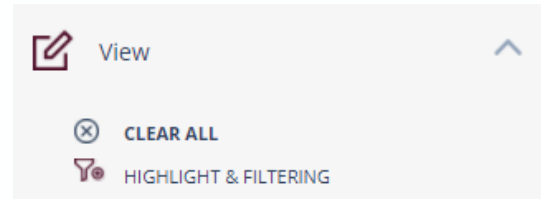
1. The graph view will show the weighted (000) numbers. If you hover over any of the data points, you will see a pop-up with all the variables for that point.
2. Select the oldest study that you want to trend from first, as your base study.
3. The trend will use the base study as the “first” one on the 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.

Simmons Insights Highlight and filtering

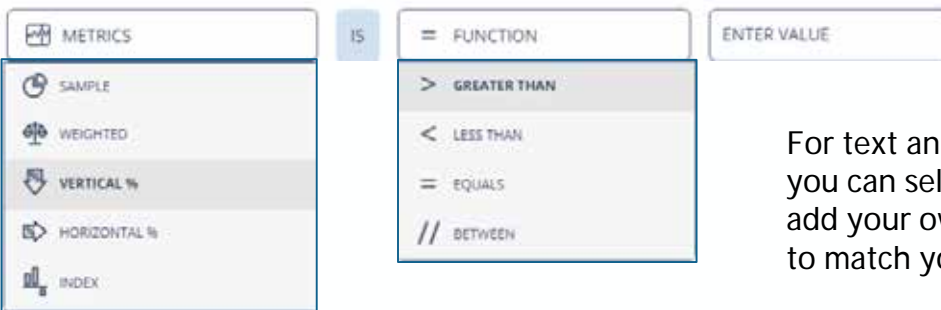
The “Highlight and Filtering” option is within the View section on the Tool Palette as well as on the crosstab data screen.



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

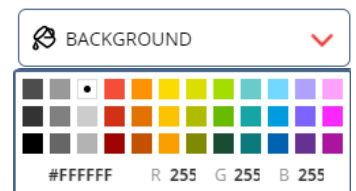
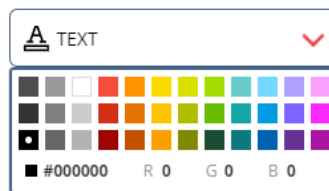
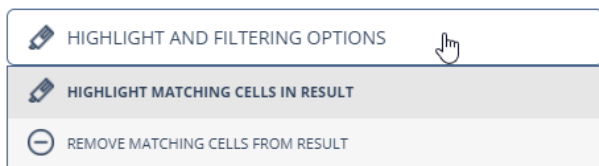


When Item Matches This:



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.

Perform This Action:

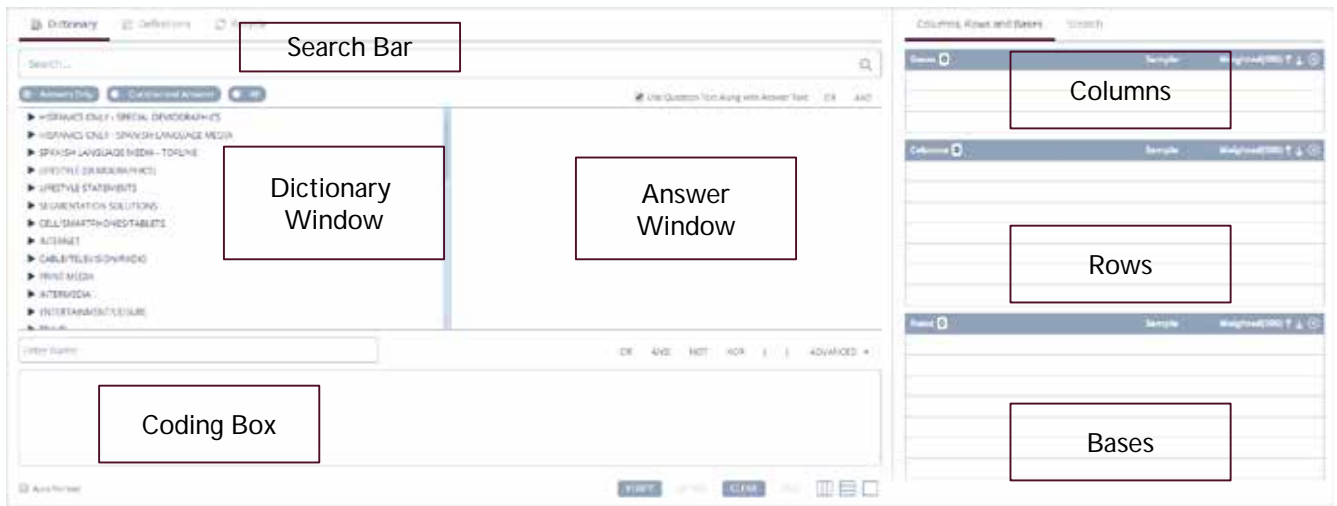


Simmons Insights Dictionary Search

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.

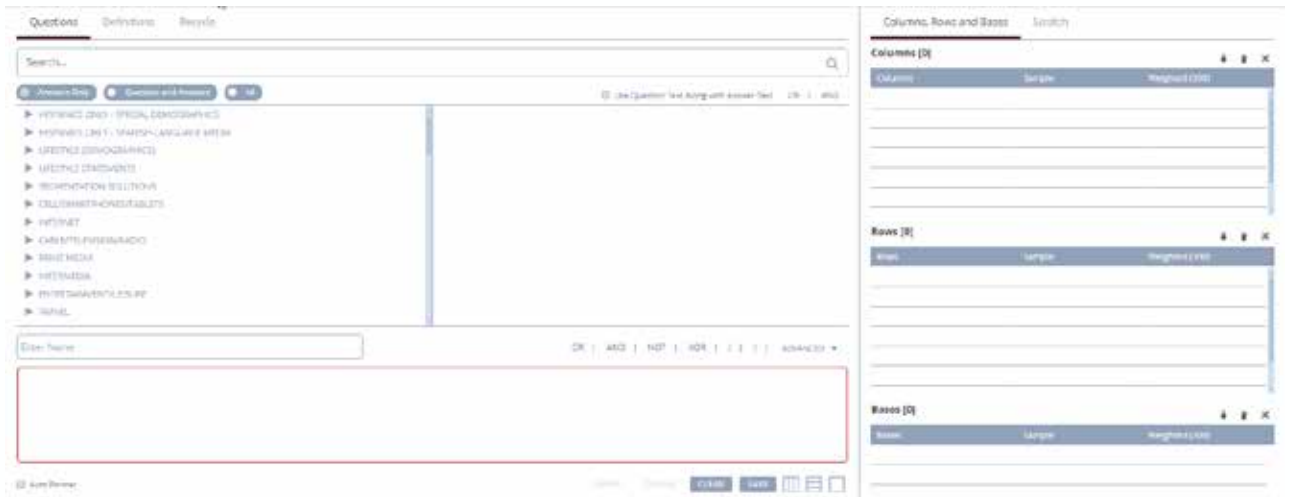
Coding Box: The coding box is used, along with logical operators, to create more complex targets.

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.

Simmons Insights Dictionary Search



Answers Only
 Question and Answers
 All

OR AND NOT XOR () ADVANCED ▾

Questions
 Definitions
 Recycle


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

 Add coding box to columns

 Add coding box to rows.

 Add coding box to base

Simmons 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 Scratch

Scratch [36]

Scratch	Sample	Weighted(000)
I AM INTERESTED IN WHAT GOES ON UNDER THE H	11,947	121,271
I LIKE TO GET A NEW CAR EVERY TWO OR THREE YE	3,914	36,872
I USE MY PERSONAL VEHICLE IN MY WORK	7,528	75,254
MY CAR SHOULD BE EQUIPPED WITH AS MANY SAF	15,797	150,347
I LIKE DRIVING	14,744	146,838
OWNING A FOREIGN CAR IS MUCH MORE PRESTIGI	3,505	33,822
FRIENDS AND FAMILY ALWAYS ASK MY ADVICE ON	3,752	38,158
A USED CAR IS JUST AS GOOD AS A NEW CAR	10,526	109,441
OPTIONS ON A CAR IMPRESS M		98,270
I LIKE TO DRIVE FASTER THAN N		87,098

Functions...
Add to Definition...

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

Columns, Rows and Bases Scratch

Columns [4]

Columns	Sample	Weighted (000)
18 - 34	5,301	70,546
35 - 44	3,451	39,877
45 - 54	4,469	41,732
55+	11,939	89,538

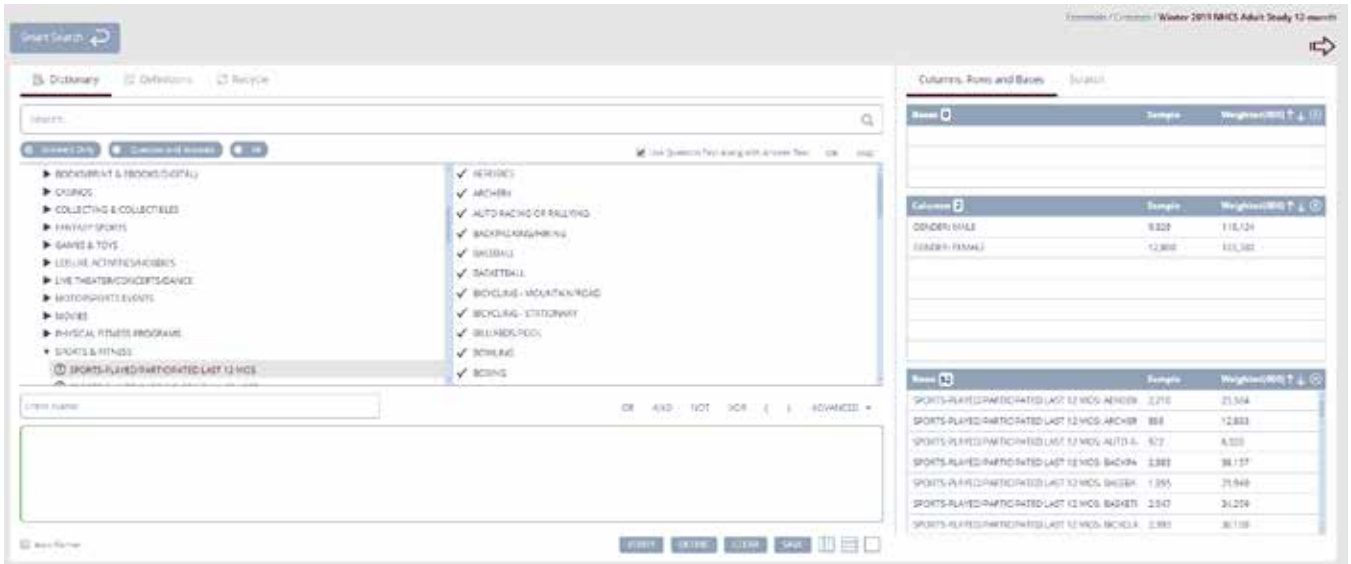
Rows [47]

Rows	Sample	Weighted (000)
I TRY TO INCLUDE PLENTY OF FIE	16,180	146,716
I OFTEN SNACK BETWEEN MEALS	16,285	161,945
MOST FROZEN DINNERS HAVE LI	12,210	118,545
I FEEL GUILTY WHEN I EAT SWEET	10,234	95,012
LUNCH IS MORE IMPORTANT TH	4,735	40,986
I NORMALLY COUNT THE CALORI	5,286	48,109

Bases [1]

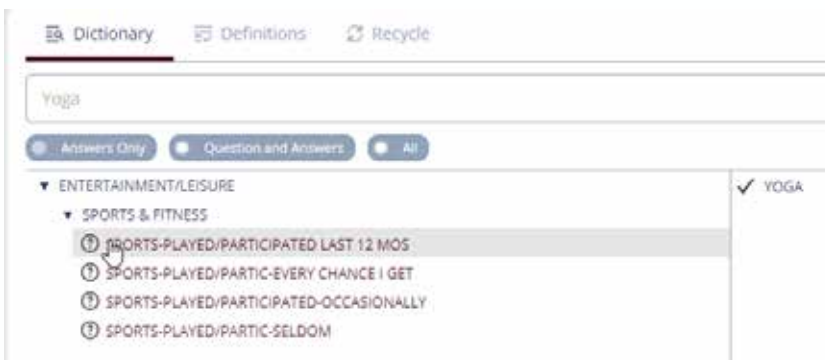
Bases	Sample	Weighted (000)
FEMALE	14,182	124,991

Simmons Insights Dictionary Search



Dictionary Search allows you to view the entire Simmons 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.

Simmons Insights Dictionary Search

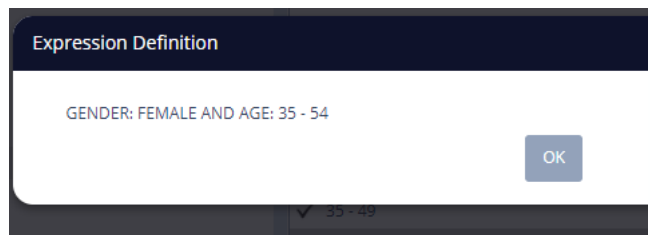


Using the connectors above the right side of the coding box (Or, And, Not, Xor), you can build a segment just like we did in smart search. You can rename the segment in the upper left hand corner, and then select one of the icons in the bottom right corner to Move to Columns, Rows, or Bases.

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.



Simmons Insights Dictionary Search

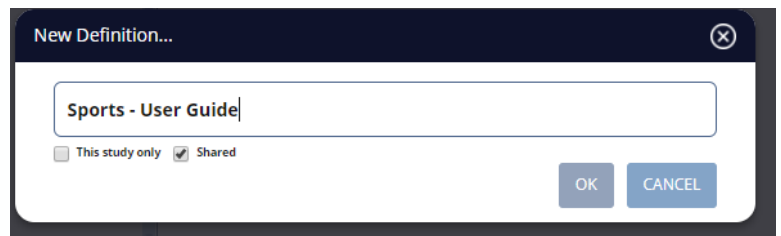
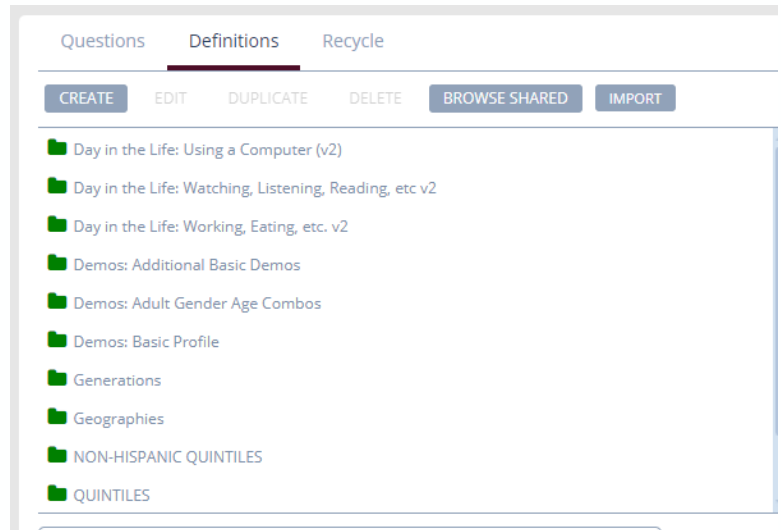
Above the data dictionary is a tab labeled “Definitions”.

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

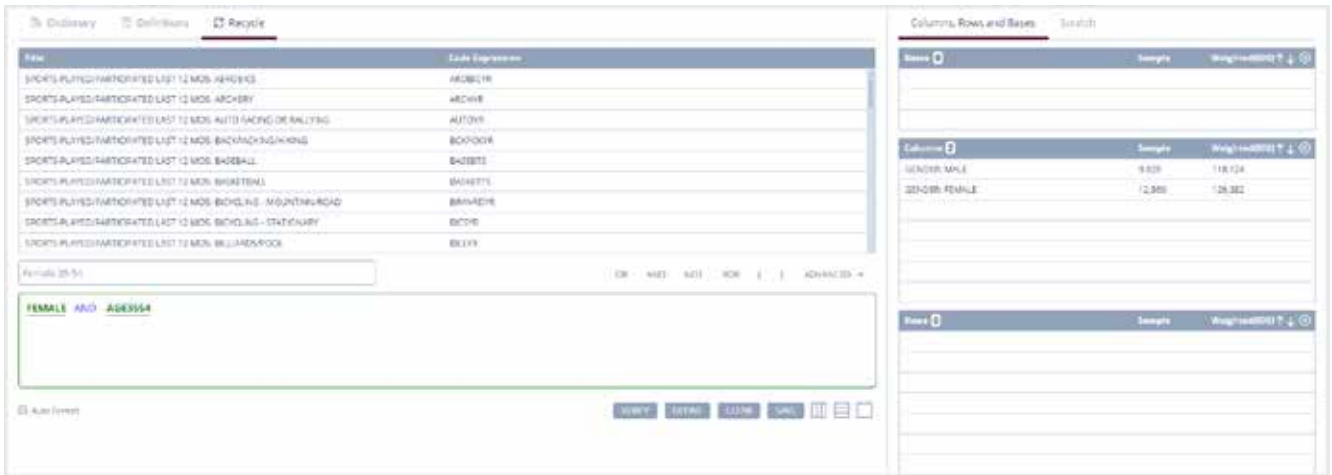
You can also create your own folder by selecting “Create” in the top left corner. Name the folder, and select “Shared” to ensure that others (only those in your same account) will be able to access your segments if necessary.

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.



Simmons Insights Dictionary Search

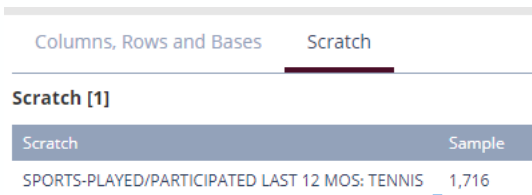


Anything you clear from your Columns, Rows, or Bases will appear in the Recycle tab – this includes any work you did with Smart Search if you select “Clear All” on the crosstab output (pg. 11)

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.

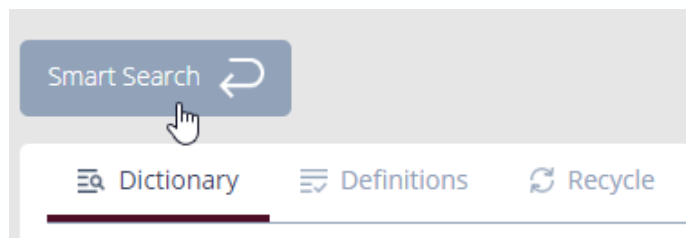


Nothing you add to the Scratch tab will appear in your final crosstab output; it is meant as a place to hold data points from the dictionary in case you think you might need to use them later!

Simmons 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 ever want to return to the Smart Search view, simply click the "Smart Search" arrow button, in the top left hand corner. DO NOT hit the back button on your web browser!



Simmons Insights DataHaul



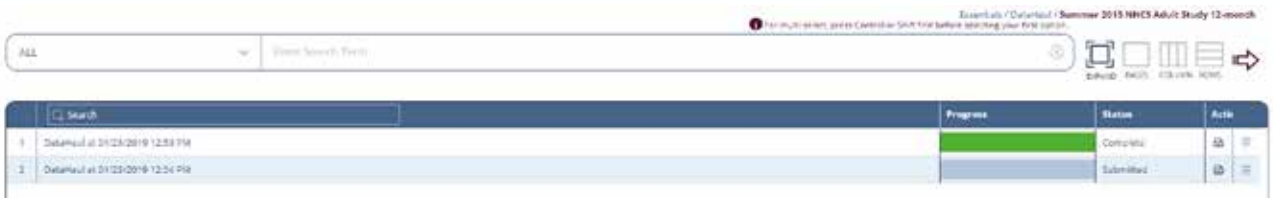
DataHaul is a one of the functionalities available in the Essentials tab of Simmons Insights.

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

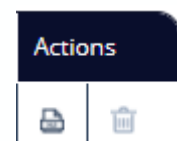
DataHaul uses the Smart Search functionality to create targets, or you can use those previously saved in a definitions folder. Use this to create up to 10 targets. Add each of these targets to your rows. You also have the ability to add a base to your targets if you wish.

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.

Simmons 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.

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, all the quick reports are visible.



Simmons 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.



Source: Simmons Research LLC, Winter 2017 Simmons Connect

† Among target social media users who selected any visitation frequency for social media websites

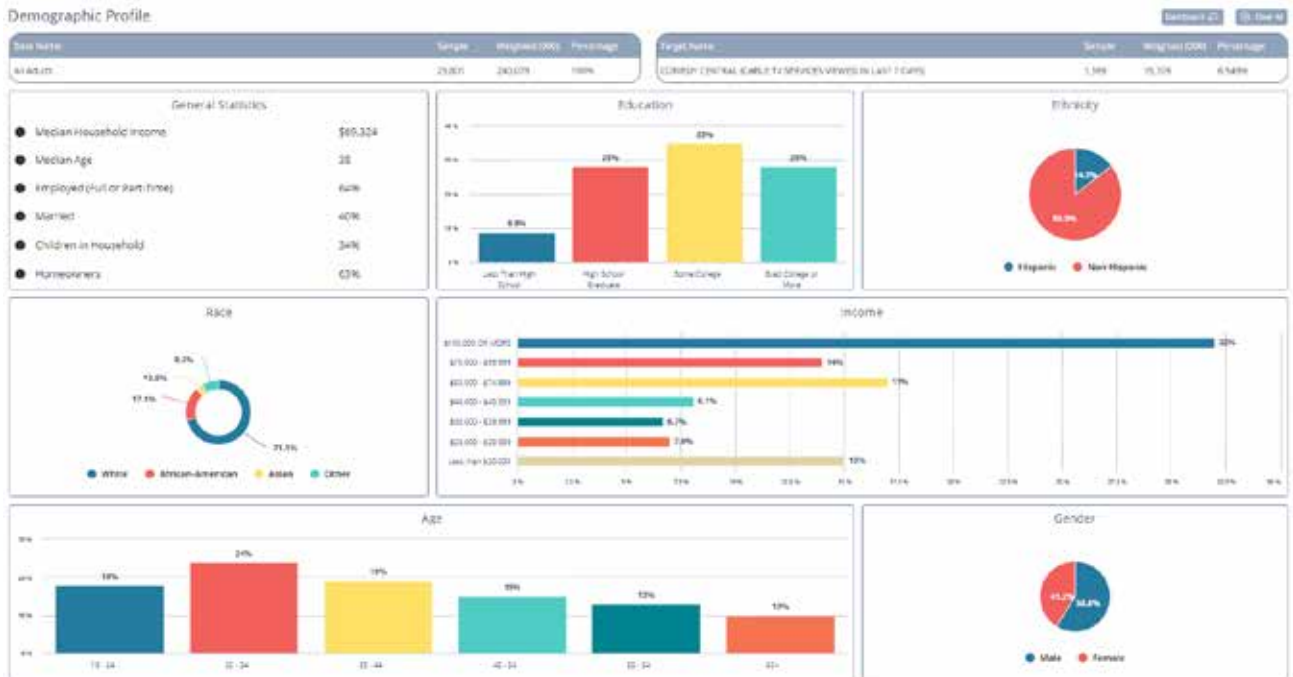
The Quick Reports have been reformatted with new icons and a new color scheme; however, the data reported is the same as the OneView reports.



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.

Simmons Insights Quick Reports

The Demographic Profile Report shows demographic variables for the target.



* Indicates a cell count from 21 to 50. Projections may be unstable; use with caution.
 ** Indicates a cell count below 21. Projections are likely unreliable; use with caution.

Source: Simmons Research LLC, Winter 2017 Simmons Connect

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%

Simmons 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.



Convenience and Ease

Sample: 168
 Weighted: 2,447
 Percent: 16%
 Index: 109

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.

Simmons 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.



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.

Game Console : 1-4 Hours

Sample: 284

Weighted: 3,170

Percent: 20%

Index: 117



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.



Simmons Insights Quick Reports

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



Television
131
 Sample: 360
 Weighted: 3999
 Percent: 25%
 Index: 131

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.

Internet Location Access Most Often

Library	186
Library	185

Library
 Sample: 121
 Weighted: 1254
 Percent: 8.0%
 Index: 186

Smartphone Activity Index

Listen to Music	98	97
-----------------	----	----

Listen to Music
 Sample: 651
 Weighted: 8,125
 Percent: 65%
 Index: 102

Message
 Play Games

MobiRati
 Sample: 394
 Weighted: 4,390
 Percent: 28%
 Index: 115

Simmons Insights Quick Reports

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



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.



Game Console

Sample: 596
 Weighted: 7,447
 Percent: 47%
 Index: 147

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.

Simmons 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.



PC at Work

Time Spent in Hours (Average Week) (Index=11.27)
 Reach (% of target) (Index=53)

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.

Simmons 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.



Smartphone

Sample: 651

Weighted: 8,125

Percent: 60%

Index: 97

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.

Simmons 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.



IM/Chat

Sample: 597

Weighted: 7,242

Percent: 58%

Index: 101

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.

Simmons 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.



Play Games

Sample: 77
 Weighted: 863
 Percent: 6%
 Index: 215

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.

Simmons 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.



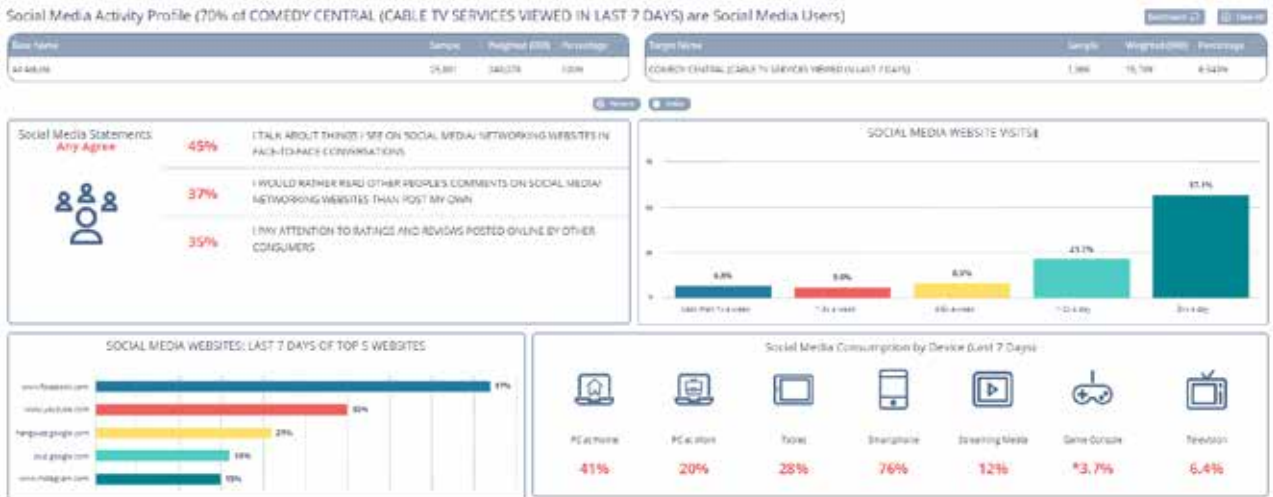
Video: 9:00-9:59AM

Sample: 542
 Weighted: 2,710
 Percent: 21%
 Index: 97

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.

Simmons 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.



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



PC at Work
Sample: 215
Weighted: 2558
Percent: 20%
Index: 123

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.

Simmons 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.



Lifestyle : Mobile

Sample: 505
 Weighted: 5,953
 Percent: 38%
 Index: 103

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.

Simmons 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.

	Total					COMEDY CENTRAL (CABLE TV SERVICES VIEWED IN LAST 7 DAYS)				
	Sample	Weighted(00)	Vertical %	Horizontal %	Index	Sample	Weighted(00)	Vertical %	Horizontal %	Index
Shopping And Classifieds: www.lowes.com	1,954	19,238	8.0%	100.0%	100	99	1,326	8.4%	6.9%	105
Shopping And Classifieds: us.flipp.com	1,839	18,243	7.6%	100.0%	100	112	1,296	8.2%	7.1%	109
Shopping And Classifieds: www.macys.com	1,943	17,763	7.4%	100.0%	100	108	1,182	7.5%	6.7%	102
Shopping And Classifieds: www.wayfair.com	1,877	18,141	7.6%	100.0%	100	106	1,150	7.3%	6.3%	97
Shopping And Classifieds: www.jet.com	1,422	14,800	6.2%	100.0%	100	91	1,076	6.8%	7.3%	111

Simmons Insights SimmonsLOCAL Flexible Markets

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.

Name	Year	Season	Start Field Date	End Field Date
Fall 2017 SimmonsLOCAL (Flexible Markets)	2017	Fall	10/26/2016	11/28/2017
Spring 2017 SimmonsLOCAL (Flexible Markets)	2017	Spring	3/20/2016	5/01/2017
Fall 2016 SimmonsLOCAL (Flexible Markets)	2016	Fall	10/05/2015	11/03/2016
Spring 2016 SimmonsLOCAL (Flexible Markets)	2016	Spring	4/27/2015	6/1/2016
Fall 2015 SimmonsLOCAL (Flexible Markets)	2015	Fall	10/27/2014	12/0/2015
Spring 2015 SimmonsLOCAL (Flexible Markets)	2015	Spring	4/7/2014	6/3/2015
Fall 2014 SimmonsLOCAL (Flexible Markets)	2014	Fall	10/27/2014	5/2/2015
Spring 2014 SimmonsLOCAL (Flexible Markets)	2014	Spring	4/7/2014	6/4/2014
Fall 2013 SimmonsLOCAL (Flexible Markets)	2013	Fall	11/7/2012	12/4/2013
Spring 2013 SimmonsLOCAL (Flexible Markets)	2013	Spring	5/9/2012	6/5/2013

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 NCS.

❄ STATE: MICHIGAN

Simmons Insights SimmonsLOCAL Flexible Markets

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.

Simmons Insights SimmonsLOCAL Flexible Markets

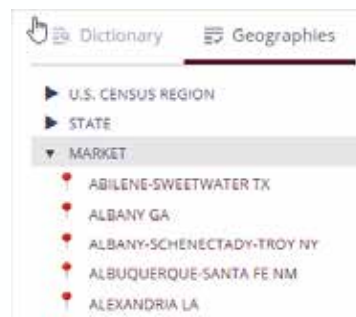
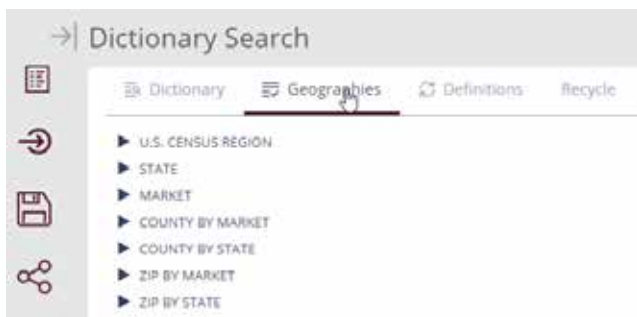
You can use Smart Search to create custom geographies by combining them in the coding box with OR, then clicking on the row, column, or base to add it to the appropriate place in your crosstab.



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.

Simmons Insights SimmonsLOCAL Flexible Markets

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



The screenshot shows the 'Import Custom Geographies' dialog box. It has a 'FILE NAME' input field with a 'BROWSE' button next to it. Below this, there are two radio buttons: 'Existing Definition' and 'New Definition'. The 'Existing Definition' option is selected, and a dropdown menu shows '--select--'. At the bottom, there are 'OK' and 'CANCEL' buttons.

- 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.

The screenshot shows the 'Import Custom Geographies' dialog box with the file name '10M 48167.txt' entered in the 'FILE NAME' field. The 'Existing Definition' option is selected, and the dropdown menu now shows '10 Miles Around 45167'. The 'OK' and 'CANCEL' buttons are at the bottom.

```
10 Miles Around 48167
48167
48374
48168
48375
48376
```

- 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.

Simmons Insights SimmonsLOCAL Flexible Markets

Running your crosstab with Flexible Markets

	TOTAL	NEWARK	CARLISLE
TOTAL	2434	1068	1366
I AM INTERESTED IN WHAT GOES ON UNDER THE HOOD OF A CAR	11.8%	12.8%	10.8%
I LIKE TO GET A NEW CAR EVERY TWO OR THREE YEARS	3.7%	3.9%	3.5%
I USE MY PERSONAL VEHICLE IN MY WORK	83%	82%	84%
MY CAR SHOULD BE EQUIPPED WITH AS MANY SAFETY FEATURES AS POSSIBLE	14.8%	15.2%	14.4%
I LIKE DRIVING	12.2%	12.5%	11.9%
OWNING A FOREIGN CAR IS MUCH MORE FUN	3.9%	4.1%	3.7%
FRIENDS AND FAMILY ALWAYS ASK MY ADVICE ON WHAT CAR THEY SHOULD BUY	11.8%	12.1%	11.5%
BUYING A FOREIGN CAR IS JUST AS GOOD AS BUYING A US CAR	18.1%	18.5%	17.7%
OPTING FOR A CAR IMPRESSES ME	8.5%	8.8%	8.2%
I LIKE TO DRIVE FASTER THAN NORMAL TRAFFIC	7.9%	8.2%	7.6%
BOTH BUYING A CAR AND TALKING ABOUT THE CAR	11.8%	12.1%	11.5%

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.


Simmons Insights Instant Edge

Quickly pinpoint market trends and unique audience segments

- Understanding the impact of current events and trends on consumer sentiment, measuring how these changes effect a brand or category, and quantifying the impact of these changes on customer personas and segments is critical for marketers to gain and defend a competitive advantage.
- Simmons Instant Edge is a do-It-yourself, short survey tool, enabling marketers to unearth and understand proprietary consumer insights. By fusing the results with Simmons' National Consumer Study, marketers can leverage the combined data to quickly shift strategies and create brand differentiation in days.

 Essentials

 Catalyst

 Edge

Instant Edge^{Beta}

The Instant Edge module will be available to all clients who have a signed Statement of Work to access Instant Edge within Simmons Insights.

Subscribers to Instant Edge will have the ability to create a new survey from the Instant Edge module, available from the Edge drop-down menu within Simmons Insights.

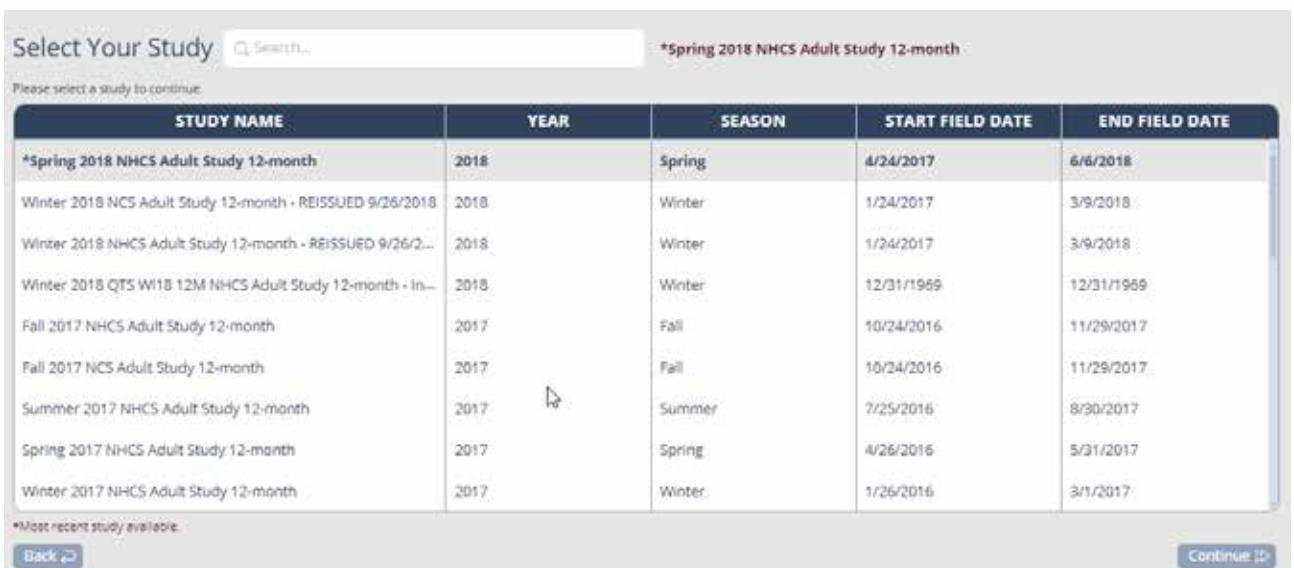
Simmons Insights Instant Edge



Once you've logged into Instant Edge, click on Create Your Instant Edge to begin.

Select your study from the list available. Note that the * shows you the current most recent study. This is the study to which your Instant Edge survey data will be appended.

Then click continue to move to the next screen.



Simmons Insights Instant Edge

On the next screen, you will provide information about your survey. The required fields include Survey Name and Sample Size.

Target Criteria

- You can select from demographics to narrow down to the target to which you want the survey to go.
- The target selection also narrows down the NHCS respondents who will be fused to the INSTANT EDGE survey data.
- If no specific target criteria are selected, it will default to All Adults 18+.
- When selecting multiple targets within a single category, these elements use an OR expression.
- When selecting multiple targets from different categories, these elements use an AND expression. For example, the lookup expression for multiple selections shown below would look like (AGE: 18 OR AGE: 19) AND GENDER: Female.



Selections	
AGE -- 18	⊗
AGE -- 19	⊗
GENDER -- Female	⊗

Simmons Insights Instant Edge

Incidence Rate

- Incidence rate is a pre-populated field that is based on the target criteria selected.
- By default, the incidence rate will be 100% for all adults 18+. If the target criteria is changed, the incidence rate is adjusted for that selection.
- There is a minimum incidence rate requirement of 10%. If your incidence rate is below 10%, you will need to adjust your target criteria.
- The selection of target criteria will determine the incidence rate for the survey as well as the suggested number of completes. You have the option to increase the number of completes above this number, but you cannot decrease it.

Correct example:

When selecting multiple targets within a single category, these elements use an OR expression. When selecting multiple targets from different categories, these elements use an AND expression. For example, the lookup expression for multiple selections would look like (AGE: 18 OR AGE: 19) AND GENDER: Female.

Selections	
GENDER -- Female	⊗
AGE -- 25 - 29	⊗
AGE -- 35 - 39	⊗
AGE -- 45 - 49	⊗
AGE -- 50 - 54	⊗

Estimated Incidence Rate
The incidence rate displayed is based on the targeting criteria you provided above.

17 %

*Sample Size (# of Completes)

Based on your targeting criteria, we have autopopulated the suggested number of completions based on what is available in the NCS, and we ensure confidence in the data. This is the minimum number of samples we require to complete the processing of data and project it to the US populations.

500 #

Example where the target criteria needs to be adjusted to equal or exceed 10%.

When selecting multiple targets within a single category, these elements use an OR expression. When selecting multiple targets from different categories, these elements use an AND expression. For example, the lookup expression for multiple selections would look like (AGE: 18 OR AGE: 19) AND GENDER: Female.

Selections	
GENDER -- Female	⊗
AGE -- 25 - 29	⊗
AGE -- 30 - 34	⊗

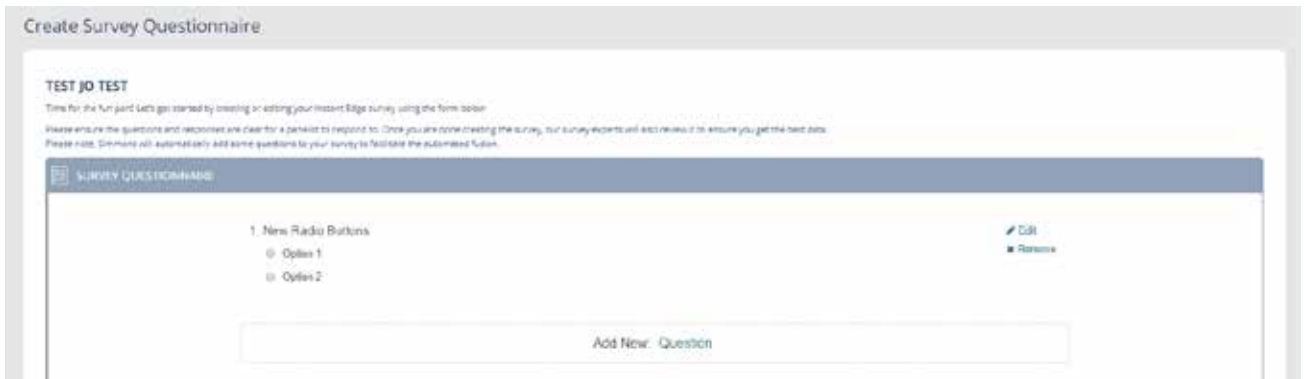
Estimated Incidence Rate
The incidence rate displayed is based on the targeting criteria you provided above.

9 %

Simmons Insights Instant Edge

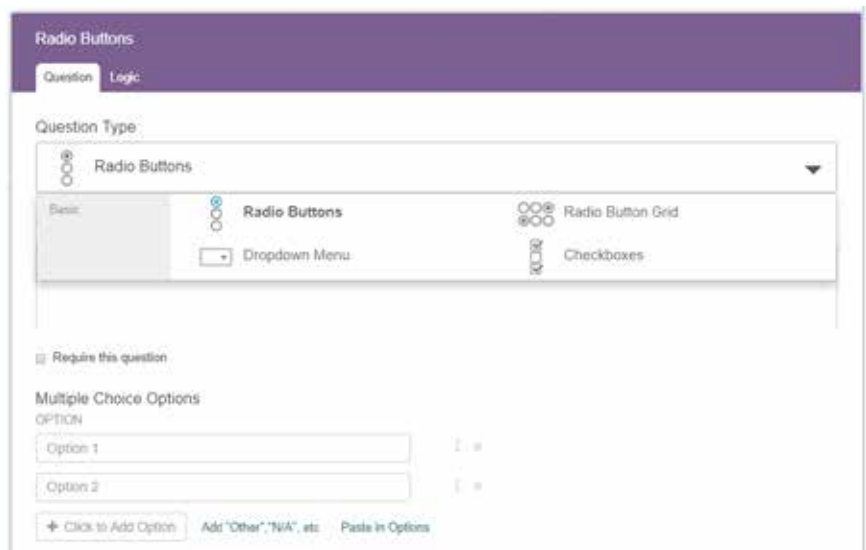
Create Survey Questionnaire

- Using the following question types, a user can add up to 10 questions: Radio Grid, Radio Button, Check Boxes, and Drop-down.
- You can easily add, edit, and delete questions on this page and continue to the next page when complete.



There are 4 types of questions available:

1. Radio Buttons
2. Dropdown Menu
3. Radio Button Grid
4. Checkboxes



Simmons Insights Instant Edge

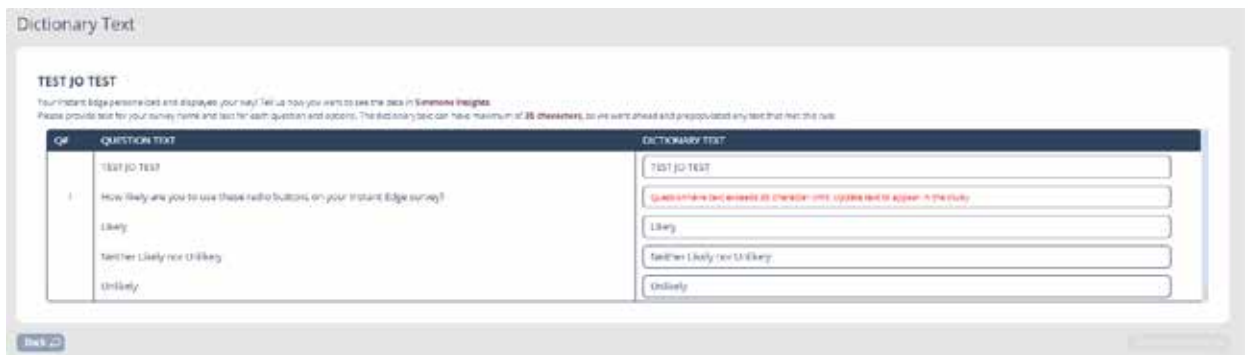
Create Survey Questionnaire

- When done, click Save and Continue.



Dictionary Text

- You can specify how you would like to see the survey text in the dictionary when it becomes available in Simmons Insights.
- If a question or answer option is less than 35 characters, the text field is auto-populated with the questionnaire text and can be edited.
- If the question or answer is over 35 characters, you need to edit the field to provide a maximum of 35 characters for the element.



- Once you edit the text to less than 35 characters, you can click continue.

Likelihood of using radio buttons

Simmons Insights Instant Edge

Survey Summary

- The Survey Summary page provides you the details of your INSTANT EDGE survey, including Survey Name, Targeting Criteria, Estimated Incidence Rate, Sample Size (# of Completes), Estimated Survey Length, Number of Questions, and Estimated Cost.
- Here, you should review the parameters and ensure that they match your expected inputs.
- If everything appears as expected, click Agree & Submit for Approval.



Submit for Review

- After submitting the survey for review, Simmons will reach out to a designated Point of Contact (POC) on the SOW for approval with the estimated survey cost.
- After POC approval is received, Simmons will review the submitted survey ensure best practices and formatting capabilities.
- If a survey requires edits, Simmons will contact you with suggestions.
- You will then be able to go back and make edits and re-submit the survey.



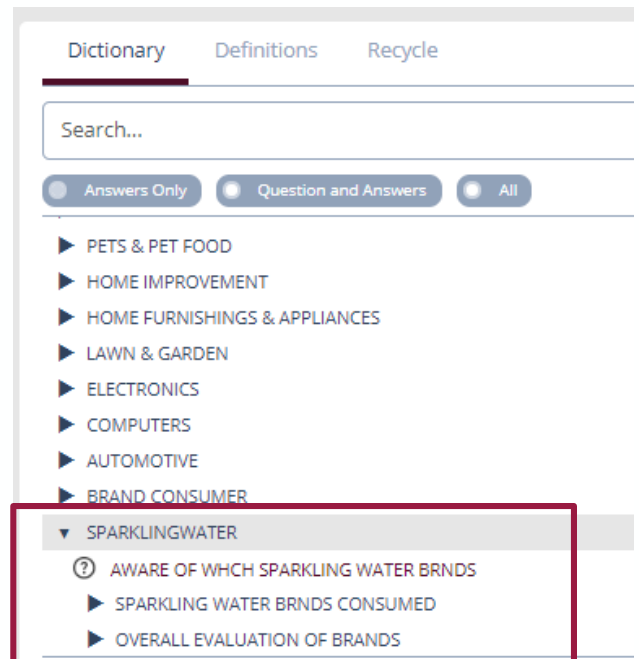
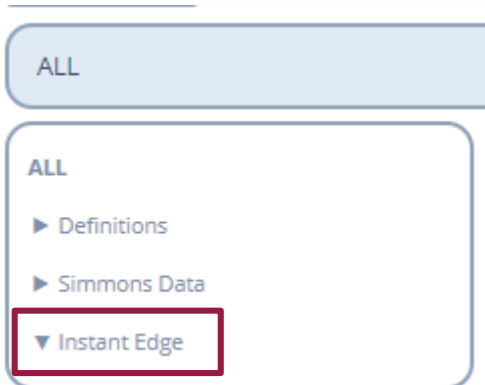
Simmons Insights Instant Edge

Launch the Survey

- After Simmons reviews the study, Simmons will launch the survey for data collection.

Access Data

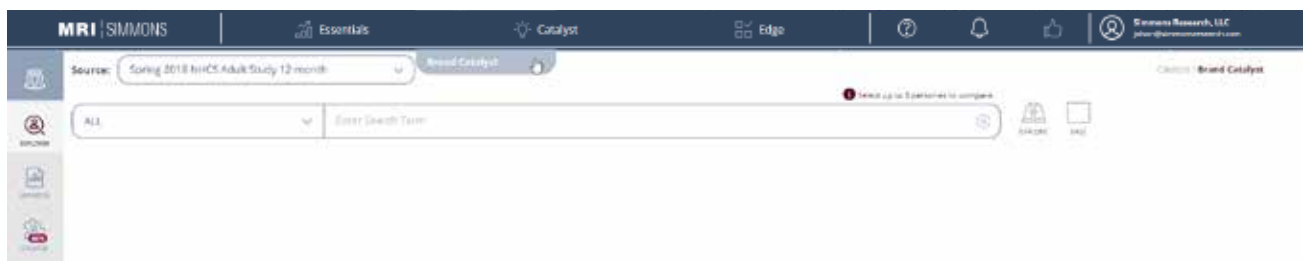
- You will be able to access the Instant Edge data from the study that you selected after processing and quality checks are completed.
- You will receive an email from Simmons notifying you that the data is now available in Simmons Insights.
- The data will be available, under the survey name that you used
 - In SmartSearch: under the Instant Edge section
 - In Dictionary search: at the bottom of the dictionary



Simmons Insights Brand Catalyst

Brand Catalyst is a predictive consumer segmentation and brand strategy tool that helps define brand identity, differentiate against competitors, create unique personas, and drive effective media, creative, and partnership strategies. Brand Catalyst includes 3 key modules:

- **Explorer:** Pre-formatted Simmons insights that highlight unique opportunities for customer retention, prospect acquisition, and category growth.
- **Reporter:** A deep dive across over 200K consumer attributes to quickly assess how personas are differentiated from each other.
- **Creator:** Automated clustering of a persona into segments, using underlying consumer psychographics to test differentiated offerings and messaging.



Brand Catalyst can be found under the Catalyst tab.

Upon entering Brand Catalyst, you will be in Explorer mode, as you can see from the side tool bar. Below that is Reporter, and at the bottom, Creator.

Brand Catalyst uses Smart Search to create up to three personas, compared side by side, with Simmons-defined key insights via visually appealing widgets and infographics.

Simmons Insights Brand Catalyst: Explorer

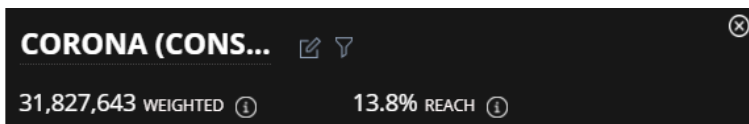
To start using Brand Catalyst, select your study from the drop-down menu.



Then create your personas with the Smart Search bar. You can use nearly any combination of Simmons variables (within the NHCS) to create each persona. After you create your first persona, click the Explore icon. To add a second or third persona (a maximum of three are allowed) to the comparison, create and add those just like the first. To set a base, build your base in Smart Search and click the base icon. Note that numeric functions (i.e. equations such as "median") will not work in Brand Catalyst when building a persona or setting a base.

The export icon enables you to export the entire Brand Catalyst report to a PDF file, with each section (see following pages) on a separate tab.

Once you have set up your persona and clicked Explore, you will see some options available on the brand tab that allow you to edit, add demographics to, or delete your persona.



Quickly add additional demographic data to your persona from a drop-down list.



Delete this persona.



Edit persona, or rename to suit your needs. The edit persona option also lets you save this persona to a definition folder. These definitions can be accessed outside of Brand Catalyst as well.



Simmons Insights Brand Catalyst: Explorer

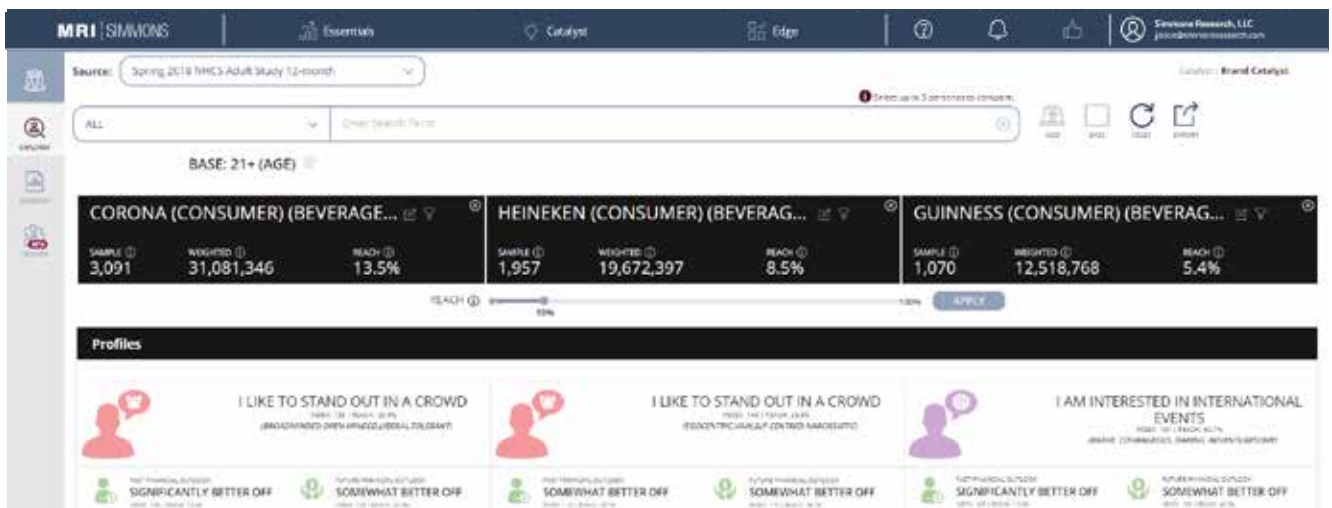
For this run, we used a base of 21+, which you can see in the upper left corner, because we're comparing consumers of various beer brands. The three beer brands are Corona, Heineken, and Guinness.



This first screen gives you an overview of each persona. The persona description tells you what the target is that you are looking at. Below that is the size of the audience, projected out onto the US adult population, and the reach across the US adult population. Note that if you choose a base, this will be the projected population and reach across your base.

The Profiles section of Explorer first looks at the top indexing general statement and self-concept (Any Agree) for the persona. Below that, you will see some Economic Outlook statements, and Purchase Propensity and Consumer Confidence scale items – each of which is the highest indexing for that particular group (with a minimum sample size of 60 on the overlap between the persona and the data variable required for inclusion). As with the other data points in Explorer, each section includes both an index and a reach %.

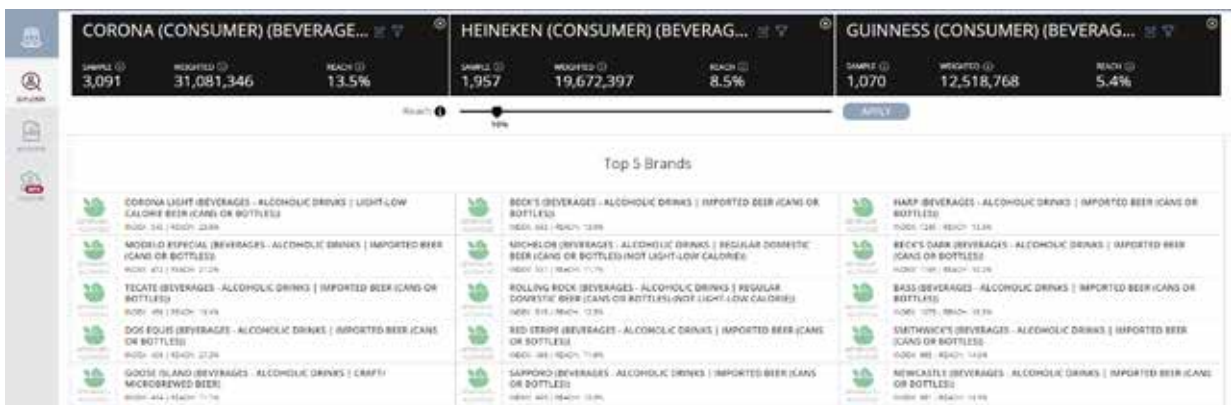
The default on the reach is set at >10%. You can use the slider to change this number up or down, depending on what your needs are for any particular project.



Simmons Insights Brand Catalyst: Explorer

The second section in Explorer includes the top 5 brands (by index) for each persona. These are the Brand Consumers described on page 54 of this user guide; in brief, the Brand Consumer is anyone who consumed this brand.

Each brand has an icon that indicates the category of the brand. Next to this is the brand name, including the category. Below this is the index, in relation to your base, and the reach, which is the vertical percent for that target/base combination.



The third section in Explorer includes the top 5 media vehicles (by index) for each persona. These are the Media Consumers described on page 54 of this user guide; in brief, the Media Consumer is anyone who used this media vehicle.

Each media vehicle has an icon that indicates the category of the vehicle. Next to this is the vehicle name, including the category. Below this is the index, in relation to your base, and the reach, which is the vertical percent for that target/base combination.



Simmons Insights Brand Catalyst: Explorer

The fourth section in Explorer includes the top psychographic statement for each category (by index) for each persona. The default setting is Any Agree (top 2 box), but the slider at the top of the screen can be moved to indicate any of the 7 scale options available. When you move the slider, the top statements and their corresponding values will change.

Each psychographic category has an icon that corresponds to that category. Next to this is the statement itself. Below this is the index, in relation to your base, and the reach, which is the vertical percent for that target/base combination.

CORONA (CONSUMER) (BEVERAGE...)

SAMPLE: 3,091 | WEIGHTED: 31,081,346 | REACH: 13.5%

HEINEKEN (CONSUMER) (BEVERAG...)

SAMPLE: 1,957 | WEIGHTED: 19,672,397 | REACH: 8.5%

GUINNESS (CONSUMER) (BEVERAG...)

SAMPLE: 1,070 | WEIGHTED: 12,518,768 | REACH: 5.4%

Reach: APPLY

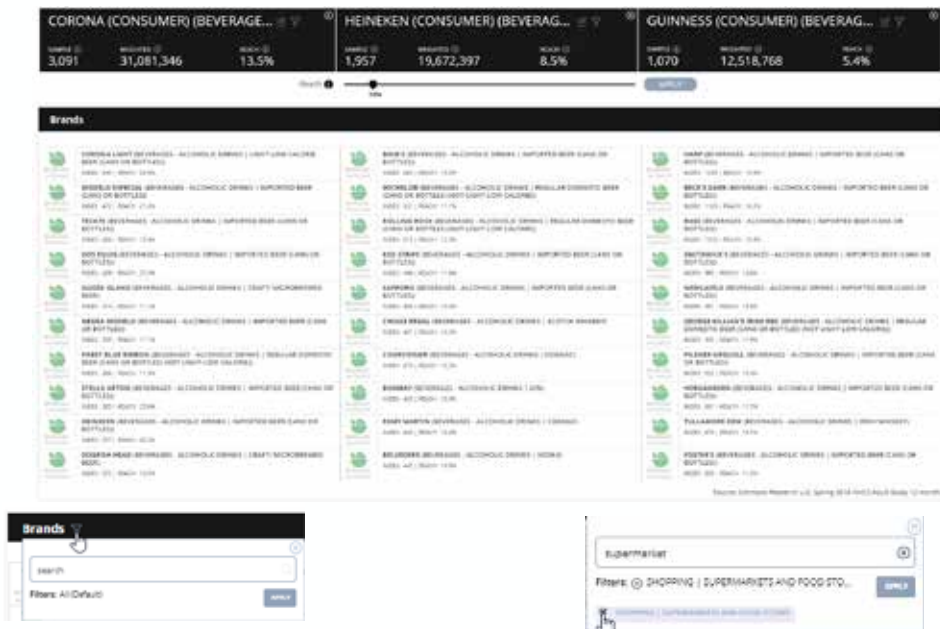
Attitude

ANY AGREE STRONGLY AGREE AGREE NEITHER AGREE/DISAGREE DISAGREE STRONGLY DISAGREE ANY DISAGREE

<p> On several occasions I have surprised myself by buying clothing brands that I normally don't</p> <p>INDEX: 121 REACH: 23.2%</p>	<p> A designer label improves a person's image</p> <p>INDEX: 133 REACH: 18.8%</p>	<p> My budget allows for me to buy expensive designer clothes</p> <p>INDEX: 133 REACH: 17.2%</p>
<p> I'd pay extra for an engine with more horsepower</p> <p>INDEX: 134 REACH: 35.2%</p>	<p> Owning a foreign car is much more prestigious than owning an American car</p> <p>INDEX: 131 REACH: 18.9%</p>	<p> I'd pay extra for an engine with more horsepower</p> <p>INDEX: 142 REACH: 36.8%</p>
<p> I use information from my cell phone/ smartphone to decide where to go or what to do in my free time</p> <p>INDEX: 121 REACH: 46.2%</p>	<p> I am more likely to switch cell phone/ smartphone service providers if they offer the latest in technology</p> <p>INDEX: 142 REACH: 24.9%</p>	<p> I use information from my cell phone/ smartphone to decide where to go or what to do in my free time</p> <p>INDEX: 122 REACH: 21.7%</p>
<p> I sometimes use a search engine to find out what information about me might be online</p> <p>INDEX: 121 REACH: 28.2%</p>	<p> I sometimes use a search engine to find out what information about me might be online</p> <p>INDEX: 122 REACH: 27.4%</p>	<p> I sometimes use a search engine to find out what information about me might be online</p> <p>INDEX: 142 REACH: 41.8%</p>
<p> I use a mobile app or website to track my calories and/ or exercise</p> <p>INDEX: 133 REACH: 22.2%</p>	<p> I will spend whatever I have to, to make myself look younger</p> <p>INDEX: 122 REACH: 14.8%</p>	<p> I use a mobile app or website to track my calories and/ or exercise</p> <p>INDEX: 131 REACH: 24.2%</p>
<p> I often choose methods of transportation that are friendlier to the environment</p> <p>INDEX: 118 REACH: 23.2%</p>	<p> I often choose methods of transportation that are friendlier to the environment</p> <p>INDEX: 122 REACH: 27.2%</p>	<p> I actively tell companies to stop sending me catalogs via the mail to protect the environment</p> <p>INDEX: 121 REACH: 27.2%</p>
<p> I often drink alcoholic beverages at restaurants</p> <p>INDEX: 127 REACH: 25.4%</p>	<p> I often drink alcoholic beverages at restaurants</p> <p>INDEX: 122 REACH: 22.2%</p>	<p> I often drink alcoholic beverages at restaurants</p> <p>INDEX: 209 REACH: 32.7%</p>
<p> I Want To Get To The Very Top In My Career</p> <p>INDEX: 142 REACH: 18.2%</p>	<p> I Want To Get To The Very Top In My Career</p> <p>INDEX: 142 REACH: 27.1%</p>	<p> I Am Interested In International Events</p> <p>INDEX: 124 REACH: 20.7%</p>
<p> I take counsel on health issues from my friends</p> <p>INDEX: 121 REACH: 25.4%</p>	<p> I take counsel on health issues from my friends</p> <p>INDEX: 122 REACH: 28.1%</p>	<p> I gather health information from websites</p> <p>INDEX: 133 REACH: 36.2%</p>
<p> I spend less time sleeping because of the internet</p> <p>INDEX: 121 REACH: 27.2%</p>	<p> I need to be connected to the internet from the moment I wake up until the moment I go to bed</p> <p>INDEX: 142 REACH: 23.4%</p>	<p> The internet has changed the way I work</p> <p>INDEX: 121 REACH: 22.4%</p>

Simmons Insights Brand Catalyst: Explorer

The fifth section in Explorer takes a closer look at the top brands (by index) for each persona, showing the top 10 for each. As with the previous top brand depiction, each brand has an icon that indicates the category of the brand. Next to this is the brand name, including the category. Below this is the index, in relation to your base, and the reach, which is the vertical percent for that target/base combination.



Within the brand section, you can use the filter to select the categories that are displayed for the top 10. For example, you can type in Supermarket, hit the return key, then select the check box and click apply to display the Supermarket category for your persona (or personas), ranked by index. You can also use the slider to change the reach percentage up or down.

To clear this filter, click the X next to the category name.



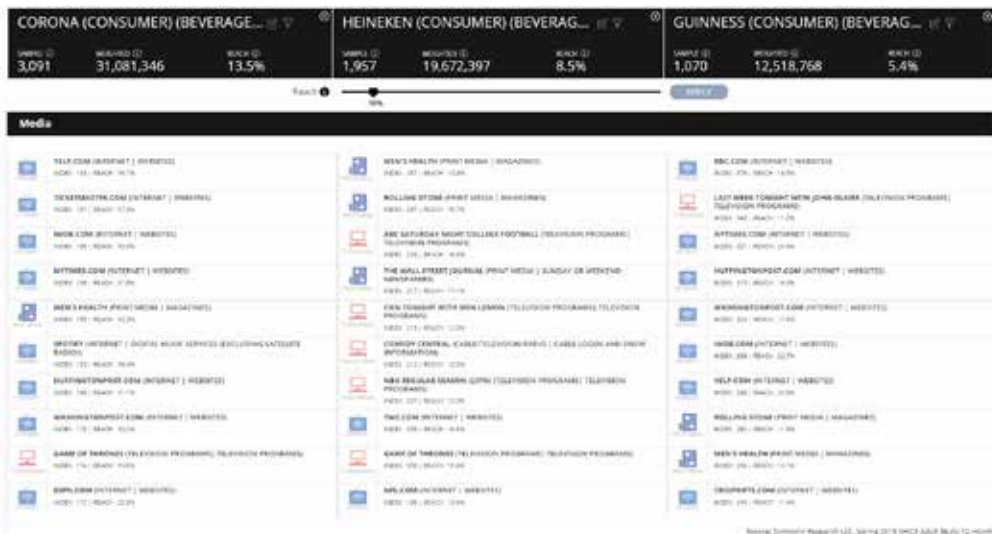
SHOPPING | SUPERMARKETS AND FOOD STORES



You can also search by brand and select the categories that you wish to view based on the categories where that brand appears.

Simmons Insights Brand Catalyst: Explorer

The sixth section in Explorer takes a deeper dive into the top media vehicles (by index) for each persona, showing the top 10 for each. As with the previous top media vehicle depiction, each vehicle has an icon that indicates the category of the vehicle. Next to this is the media name, including the category. Below this is the index, in relation to your base, and the reach, which is the vertical percent for that target/base combination.



Within the media section, you can use the filter to select the media categories that are displayed for the top 10. For example, you can type in magazines, hit the return key, then select the check box and click apply to display the magazine category for your persona (or personas), ranked by index. You can also use the slider to change the reach percentage up or down.



To clear this filter, click the X next to the category name.



You can also search by name and select the categories that you wish to view based on the categories where that media brand appears.



Simmons Insights Brand Catalyst: Explorer

The final section in Explorer takes a look at demographics. Each line is contains a demographic variable included in the Simmons data, with the highlighted data point being the segment within that variable that has the highest index compared to the base.

As with the previous overviews, there is an icon to indicate the demographic variable represented. For each persona, the highlighted data point is shown, along with the index (to the base) and the reach % of that particular variable.

CORONA (CONSUMER) (BEVERAGE...)			HEINEKEN (CONSUMER) (BEVERAG...)			GUINNESS (CONSUMER) (BEVERAG...)		
SAMPLE	WEIGHTED	REACH	SAMPLE	WEIGHTED	REACH	SAMPLE	WEIGHTED	REACH
3,091	31,081,346	13.5%	1,957	19,672,397	8.5%	1,070	12,518,768	5.4%

Reach: 10% APPLY

Demographics

Variable	Index	Reach	Variable	Index	Reach	Variable	Index	Reach
25 - 34	194	24.9%	25 - 34	111	21.7%	25 - 34	117	21.9%
West	111	23.7%	Northeast	123	22.9%	Northeast	121	21.7%
2 Children	128	17.4%	2 Children	127	11.3%	2 Children	110	13.7%
Graduate Degree	111	15.9%	College Graduate	141	20.1%	Graduate Degree	116	21.7%
Employed full time (30+ hours)	124	48.8%	Employed full time (30+ hours)	119	47.8%	Employed full time (30+ hours)	136	51.2%
Non-Hispanic	81	11.8%	Non-Hispanic	81	10.3%	Non-Hispanic	106	18.8%
Male	121	10.2%	Male	148	10.9%	Male	142	10.9%
\$150,000 - \$249,999	112	17.4%	\$150,000 - \$249,999	121	17.9%	\$150,000 - \$249,999	114	21.3%
Never Married	124	21.2%	Never Married	133	21.8%	Never Married	121	20.1%
Somewhat liberal	144	18.8%	Somewhat liberal	133	19.8%	Somewhat liberal	142	22.2%

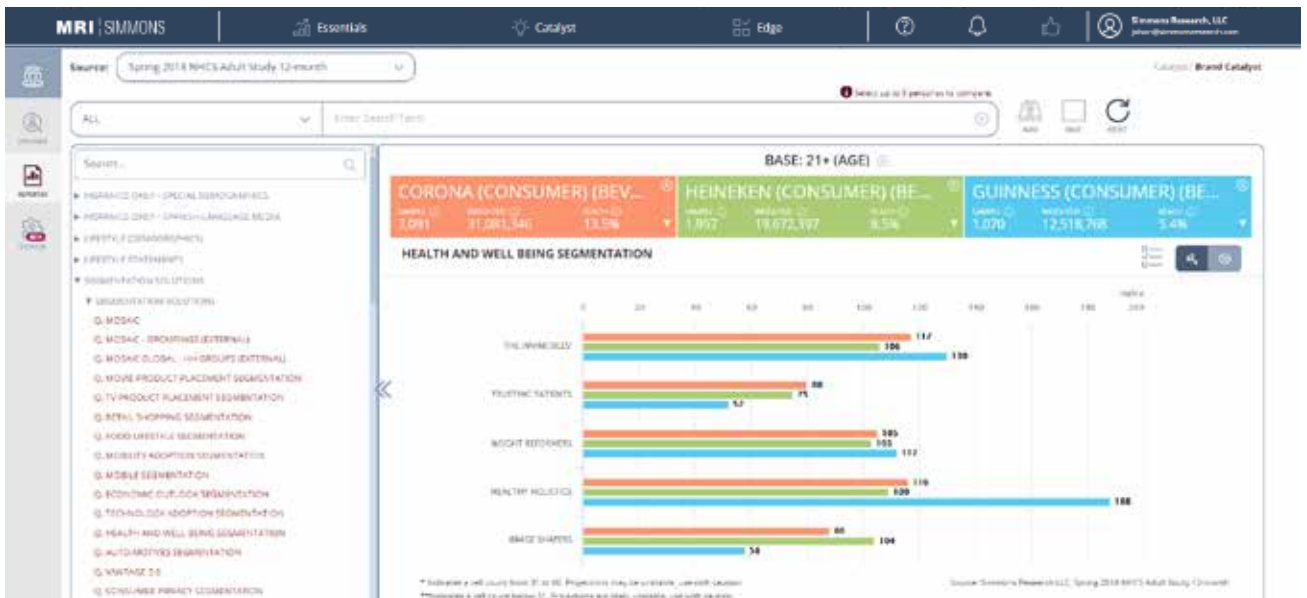
Simmons Insights Brand Catalyst: Reporter

Brand Catalyst Reporter enables the user to take a deeper dive across the over 200,000 consumer attributes available in Simmons, to quickly assess how brands and their personas differentiate from each other.

Clicking on the Reporter icon will open this window, with the personas (differentiated by colors) on the right-hand side and the Simmons data dictionary on the left-hand side.

As with Explorer, Reporter allows the user to compare and contrast up to 3 personas using data visualizations on individual questions within the Simmons data dictionary. You can use the same personas from an Explorer run or click directly into Reporter and create your own personas there using Smart Search.

The colors in the chart will coordinate with the persona colors at the top of the chart, enabling the user to quickly compare and contrast the personas in relation to any data point.



Simmons Insights Brand Catalyst: Reporter

Reporter enables the user to visualize individual data points, based on the Simmons dictionary.

Within the dictionary on the left-hand side of the window, the arrows indicate major categories. Click on an arrow to expand the category. Continue this action within any subcategories to get to the red Q (for question) entry. There is also a search box at the top of the dictionary to locate specific data points.

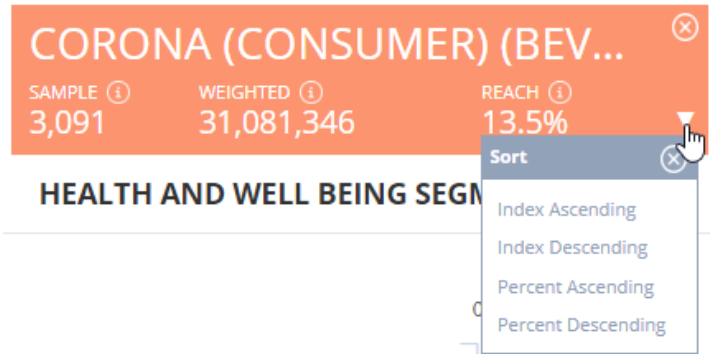


Once you click on that Q, the data visualization will appear in the right-hand window. You can toggle between % (vertical % or reach) and index by clicking on the Index/Percent icon (in the red box below) in the upper right-hand corner. The arrows on the left side enable you to expand/contract the window to see either a full screen of data or a split screen with data and the dictionary.



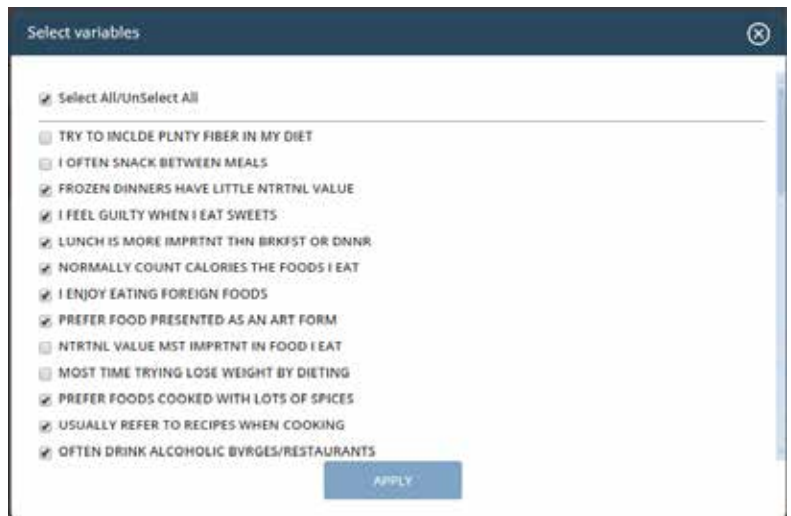
Simmons Insights Brand Catalyst: Reporter

Within each persona target, you have the ability to sort the variables on-screen by either index or percent, and ascending or descending. Click on the arrow at the bottom right side of each persona name.



The Select Variables button enables you to select from the available options to view only the ones that are relevant to your project or that you want to compare between your personas.

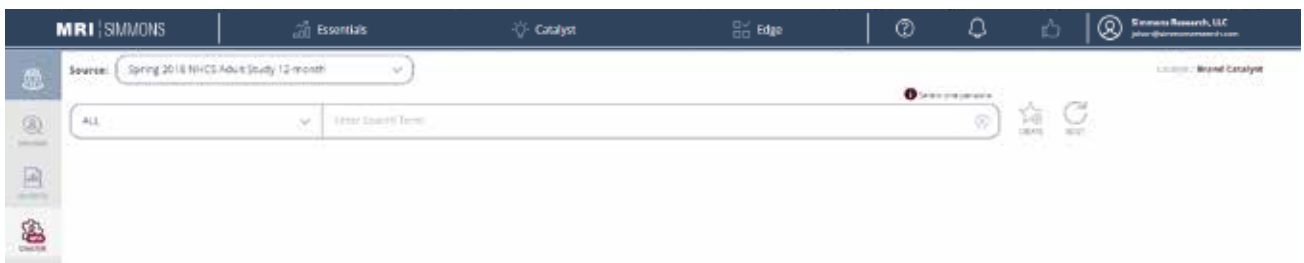
Each variable can be toggled on or off to display only those that are checked in the Reporter display.



Simmons Insights Brand Catalyst: Creator (beta)

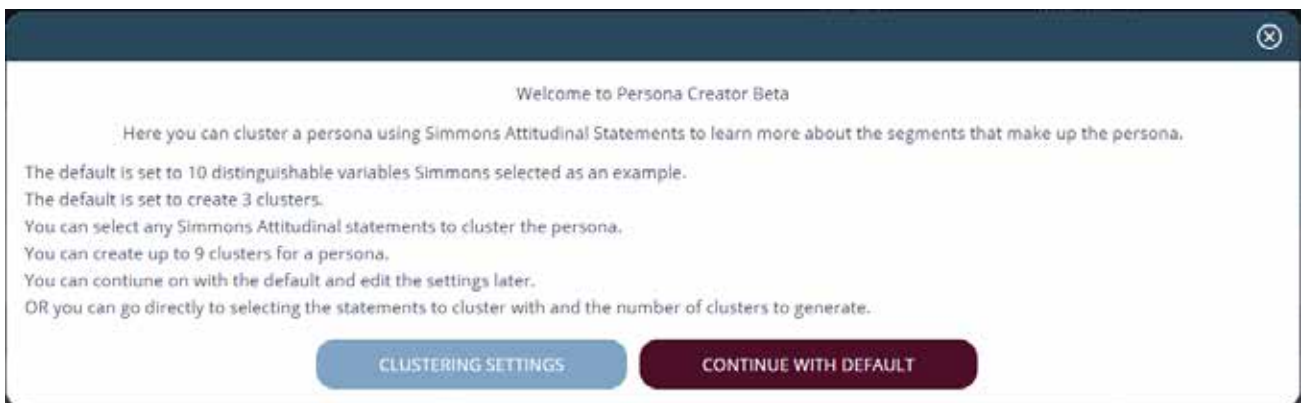
Brand Catalyst Creator automates the segmentation of a persona into consumer groups that share similar psychographics, using advanced clustering.

Clicking on the Creator icon will open this window, with the ability to create a persona using the Smart Search bar.



Once you have created your persona by using the Smart Search bar, click on the Create icon to build your initial segments.

Before your segments are created, you will see the pop-up window below. From here, you have to option to continue with the default (Simmons-selected) attitudes to see that group of segments – or you can go to Clustering Settings and select the combination of attitudes that you feel best reflects the solution you wish to build.



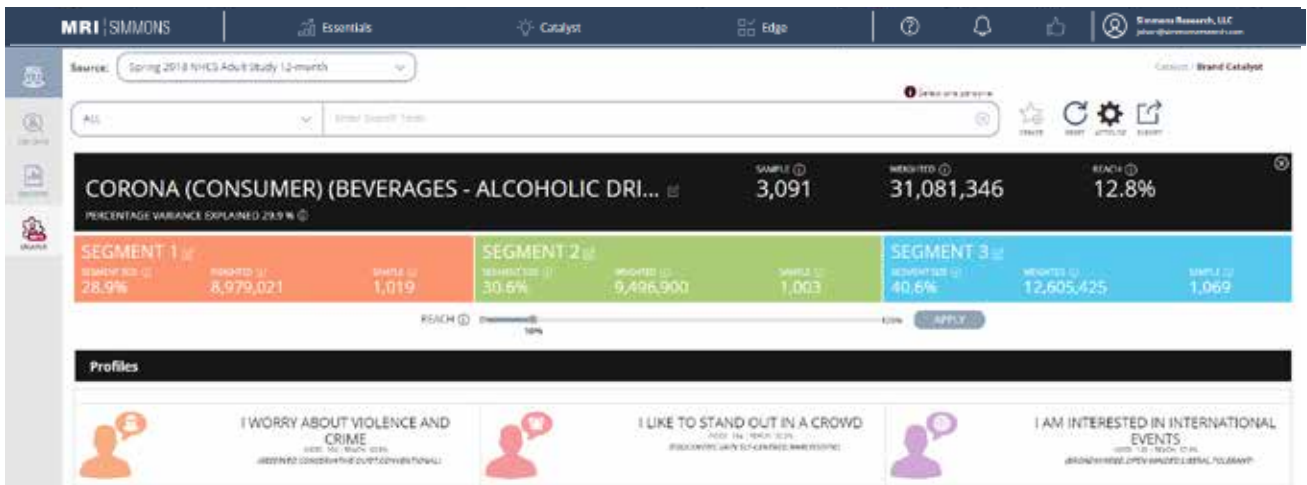
Simmons Insights Brand Catalyst: Creator (beta)

Using the Default Settings

CONTINUE WITH DEFAULT

Once you click the Continue With Default button, your segments will load. The default setting includes 3 segments, based on 10 statements that Simmons has found to be discriminating across a number of brands.

The default 3 segments will add up to 100% of the persona that you created. For each segment, you will see a view similar to that in Explorer, with the various sections for brands, media, and attitudes. As with Explorer, there is a slider to increase or decrease the reach threshold for the individual data points shown within the profile.



From this window, you can click on the Export icon to export a PDF of the 3 segments, or you can click on the Attitude icon to adjust your settings.



Simmons Insights Brand Catalyst: Creator (beta)

Using the Clustering Settings

CLUSTERING SETTINGS

Note: This is also what you will see when you click the Attitude icon at any time.

The screenshot shows the 'Clustering Settings' dialog box. At the top, there is a title bar with 'Clustering Settings' and a close button. Below the title bar, there are two main sections: 'Max Solution Clusters' and 'Select Your Template'. The 'Max Solution Clusters' section has a dropdown menu set to '3'. The 'Select Your Template' section is a text input field. Below these are two scrollable lists: 'Clustering Statements' and 'Selected Statements'. The 'Clustering Statements' list includes: 'ATTITUDES (ENVIRONMENT)' (checked), 'PROD PLC(MOVIES/MOVIE THEATRS)', 'ATTITUDES(CELL PHNS/SMRTPHNS)', 'ATTITUDES (ABOUT SHOPPING)', 'SHOP BEHAVIOR', 'ATTITUDES(HEALTH & MEDICINE)', 'ATTITUDES/OPINIONS (FOOD)' (checked), and 'SELF-CONCEPTS'. The 'Selected Statements' list includes: 'I MAKE A CONSCIOUS EFFORT TO RECYCLE PAPER, GLASS, CANS AND OTHER ITEMS', 'I OFTEN DRINK ALCOHOLIC BEVERAGES AT RESTAURANTS', 'OFTEN I CAN BE SWAYED BY COUPONS TO TRY NEW FOOD PRODUCTS', 'I LIKE TO TRY NEW DRINKS', 'WHEN SHOPPING FOR FOOD, I ESPECIALLY LOOK FOR ORGANIC OR NATURAL FOODS', 'I ENJOY WATCHING RELIGIOUS TELEVISION PROGRAMS', and 'I AM AN OPTIMIST'. At the bottom, there is a 'TEMPLATE NAME' input field and an 'APPLY' button. A note below the input field states '*Template name can be 60 character max'.

The next page will go into each of these particular settings.

Simmons Insights Brand Catalyst: Creator (beta)

CLUSTERING SETTINGS

Set the number of clusters you prefer for your solution. The default is 3, but you can select up to 9.

Clustering Statements

- > ATTITUDES (ENVIRONMENT)
- > PROD PLC(MOVIES/MOVIE THEATRS)
- > ATTITUDS(CELL PHNS/SMRTPHNS)
- > ATTITUDES (ABOUT SHOPPING)
- > SHOP BEHAVIOR
- > ATTITUDES(HEALTH & MEDICINE)
- > ATTITUDES/OPINIONS (FOOD)
- > SELF-CONCEPTS

Within this box, you can select and unselect the statements that you want to use for your particular cluster solution. Note that you can use any combination of statements.

Selected-Statements

- × I MAKE A CONSCIOUS EFFORT TO RECYCLE PAPER, GLASS, CANS AND OTHER ITEMS
- × I OFTEN DRINK ALCOHOLIC BEVERAGES AT RESTAURANTS
- × OFTEN I CAN BE SWAYED BY COUPONS TO TRY NEW FOOD PRODUCTS
- × I LIKE TO TRY NEW DRINKS
- × WHEN SHOPPING FOR FOOD, I ESPECIALLY LOOK FOR ORGANIC OR NATURAL FOODS
- × I ENJOY WATCHING RELIGIOUS TELEVISION PROGRAMS
- × I AM AN OPTIMIST

This box shows the statements that have been selected. When you first open these settings, you will see the default statements listed in this box.

Template Name ⊗ ↻

APPLY

*Template name can be 60 character max

A set of statements can be saved as a template, to be applied for different personas, then selected via the Select Your Template box.

Select Your Template

Simmons Insights Brand Catalyst: Creator (beta)

CLUSTERING SETTINGS

If you select more than 3 clusters, you will see the window below. This gives you a quick overview of your segments and enables you to select 3 of them to compare across the Creator view.

CORONA (CONSUMER) (BEVERAGES - ALCOHOLIC DRI... PERCENTAGE VARIANCE EXPLAINED 30.4 %

SAMPLE 3,091 WEIGHTED 31,081,346 REACH 12.8%

Select 3 segments with sample size greater than or equal to 60:

	Sample Size	Weighted	Segment Reach
<input type="checkbox"/> SEGMENT 1	780	6,300,356	20.3%
<input type="checkbox"/> SEGMENT 2	585	6,666,267	21.4%
<input type="checkbox"/> SEGMENT 3	685	6,606,107	21.3%
<input type="checkbox"/> SEGMENT 4	560	6,123,141	19.7%
<input type="checkbox"/> SEGMENT 5	481	5,385,475	17.3%

COMPARE CANCEL

The segments icon lets you toggle back to the above screen to select the different segments you want to view side by side

SEARCH: All Enter Search Term

SEGMENTS: CORONA (CONSUMER) (BEVERAGES - ALCOHOLIC DRI... PERCENTAGE VARIANCE EXPLAINED 30.4 %

SAMPLE 3,091 WEIGHTED 31,081,346 REACH 12.8%

SEGMENT 1	SEGMENT 3	SEGMENT 5
REACH 20.3%	REACH 21.3%	REACH 17.3%
WEIGHTED 6,300,356	WEIGHTED 6,606,107	WEIGHTED 5,385,475
SAMPLE 780	SAMPLE 685	SAMPLE 481

Reach: 30% APPLY

Profiles

I AM A PERFECTIONIST
(EFFICIENT, ORGANIZED, DETAILED THOROUGH)

High Financial Confidence
SOMEWHAT BETTER OFF
WELL TO DO, RICH, ELITE

Parties and Entertainment
SOMEWHAT LIKELY
WELL TO DO, RICH, ELITE

Consumer Confidence Scale
6 HIGH
WELL TO DO, RICH, ELITE

I LIKE TO STAND OUT IN A CROWD
(SOCIAL, ENVIRONMENTAL, INFLUENTIAL)

High Financial Confidence
SOMEWHAT BETTER OFF
WELL TO DO, RICH, ELITE

Parties and Entertainment
SOMEWHAT LIKELY
WELL TO DO, RICH, ELITE

Consumer Confidence Scale
6 HIGH
WELL TO DO, RICH, ELITE

I LIKE TO STAND OUT IN A CROWD
(PROMINENT, HIGH STATUS, INFLUENTIAL)

High Financial Confidence
SOMEWHAT BETTER OFF
WELL TO DO, RICH, ELITE

Parties and Entertainment
LIKELY
WELL TO DO, RICH, ELITE

Consumer Confidence Scale
3 LOW
WELL TO DO, RICH, ELITE

Simmons Insights Brand Catalyst: Creator (beta)

You can rename and save any created persona or segment by using the icons next to the persona and segment names. Click the cloud icon to save the names.

The screenshot displays a cluster solution for 'My Corona Drinkers'. At the top, the main cluster is summarized with a sample size of 3,091, a weighted value of 31,081,346, and a reach of 12.8%. Below this, three segments are shown in a row:

Segment Name	Segment Size	Weighted	Sample
Thirsty Thursday	20.3%	6,300,356	780
Happy Hours	21.3%	6,606,107	685
On Vacation	17.3%	5,385,475	481

Each segment name has a cloud icon next to it, indicating it can be saved. The overall percentage variance explained for the cluster is 30.4%.

When you click the cloud icon to save the names, it also saves this particular cluster solution as a definition file (under the persona name) with the segments in the folder. You can then use these segments within other modules in Simmons Insights, including Quick Reports.

This screenshot shows a search dropdown menu. The main header is 'My Corona Drinkers' with a dropdown arrow. Below it is a search input field labeled 'Enter Search Term'. A list of saved segments is displayed below the search field:

- Thirsty Thursday
- SEGMENT 2
- Happy Hours
- SEGMENT 4
- On Vacation

Note that, because of the way the segments are created (based on particular respondents), you are limited to using these segments within the specific study in which they were created.

The screenshot shows the 'Dictionary Search' interface. It has a search bar at the top and a list of saved segments below. The segments listed are:

- THIRSTY THURSDAY
- SEGMENT 2
- HAPPY HOURS
- SEGMENT 4
- ON VACATION


The interface also includes navigation tabs for 'Dictionary', 'Definitions', and 'Recycle', and a set of action buttons: 'CREATE', 'EDIT', 'DUPLICATE', 'DELETE', 'SHOW SHARD', and 'ARCHIVE'.

Simmons Insights Brand Catalyst

Deep Dive Functionality

- Deep Dive allows users to go beyond the top data point shown and see the other data points in the grouping that meet the set criteria but are 2nd, 3rd, 4th, etc. highest.
- Deep Dive is available for Explorer and Creator view and only for the following sections: Attitudes, Top Brands, Top Media, Demographics.
- The entire data point box is clickable.


For example, if you want to go deeper into the Food preferences of your persona, click on the statement that is the highest indexing for that particular persona.



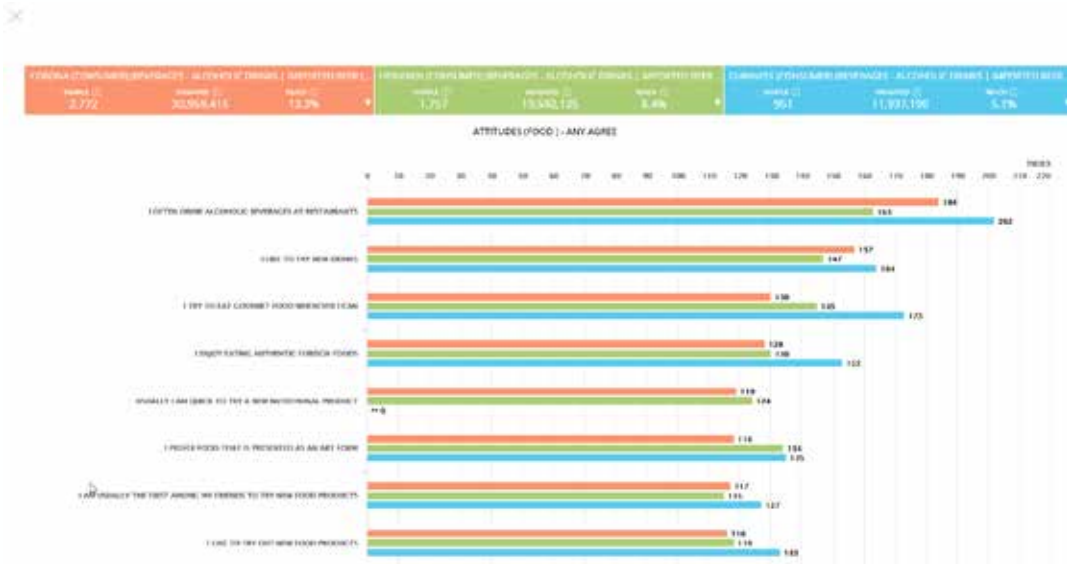
FOOD

I often drink alcoholic beverages at restaurants

INDEX: 184 | REACH: 51.8%



A slider will open up with all the food attitudes in a bar graph.

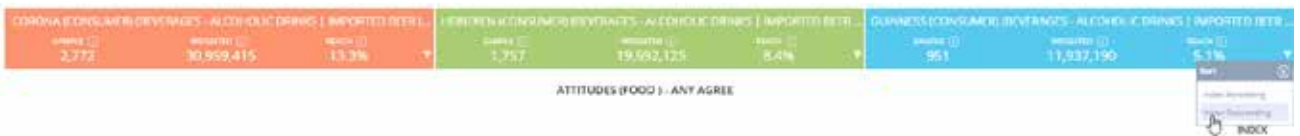


The bar graph will be in the sort order of the persona that was clicked. For example, we clicked on the Food statement under Corona, so the deep dive will show all of the Food Any Agree statements in order of Explorer rules for Corona.

Simmons Insights Brand Catalyst

Deep Dive Functionality

- While on this screen, the user can choose to sort based on one of the other personas.



Then the bar chart will reorder the Food Any Agree statements by the Explorer rules based on Guinness consumers.



- Note that the blue bars are now in descending order while the blue and orange bars fluctuate.
- There is a tool tip available to provide additional metrics as well

SAMPLE: 295
WEIGHTED: 4,071,979
REACH: 34.1%

Simmons Insights Sales Catalyst

Sales Catalyst (beta): Sales Catalyst is an automated partnership exploration and audience analysis tool. Built on the Insights platform with Smart Search technology, Sales Catalyst helps advertising sales, partnership, and sponsorship teams understand commonalities between their audience and that of a potential partner. Sales Catalyst features advanced data visualizations that quickly illustrate the value of an audience, helping researchers streamline media sales and build more meaningful partnerships.

This beta release includes 3 modules:

- **Target:** Get deeper insights into the mindset of a target persona, media consumers, and the overlap between the two. Identify the media and brand preferences and consumption of the overlap audience to inform your pitch strategy and discover new partner prospects.
- **Package:** Quickly assess which sub-entities, segments, attitudes, or content resonates best with the desired audience and pitch that combination, then build packages to highlight your competitive advantage.
- **Compare:** Easily compare and contrast your audience versus that of the competition to inform pitch strategy and creative recommendations. The Compare module helps assess the market as defined by you and identifies potential opportunities for reaching consumers.



Sales Catalyst can be found under the Catalyst tab.

Upon entering Sales Catalyst, you will be in Target mode, as you can see from the side tool bar. Below that is Package, and at the bottom, Compare. Sales Catalyst uses Smart Search to create a target market and an entity, with Simmons-defined key insights via visually appealing widgets and infographics to show the overlap between the two.

Simmons Insights Sales Catalyst: Target

To start using Sales Catalyst, select your study from the drop-down menu.



Then create your options with the Smart Search bar. You can use nearly any combination of Simmons variables (within the NHCS) to create each option.

The input options will always include Target Market and Entity. The other options will vary depending on which module the user is in.

Target Market: The expression that reflects the audience that you want to reach, influence, or learn about.



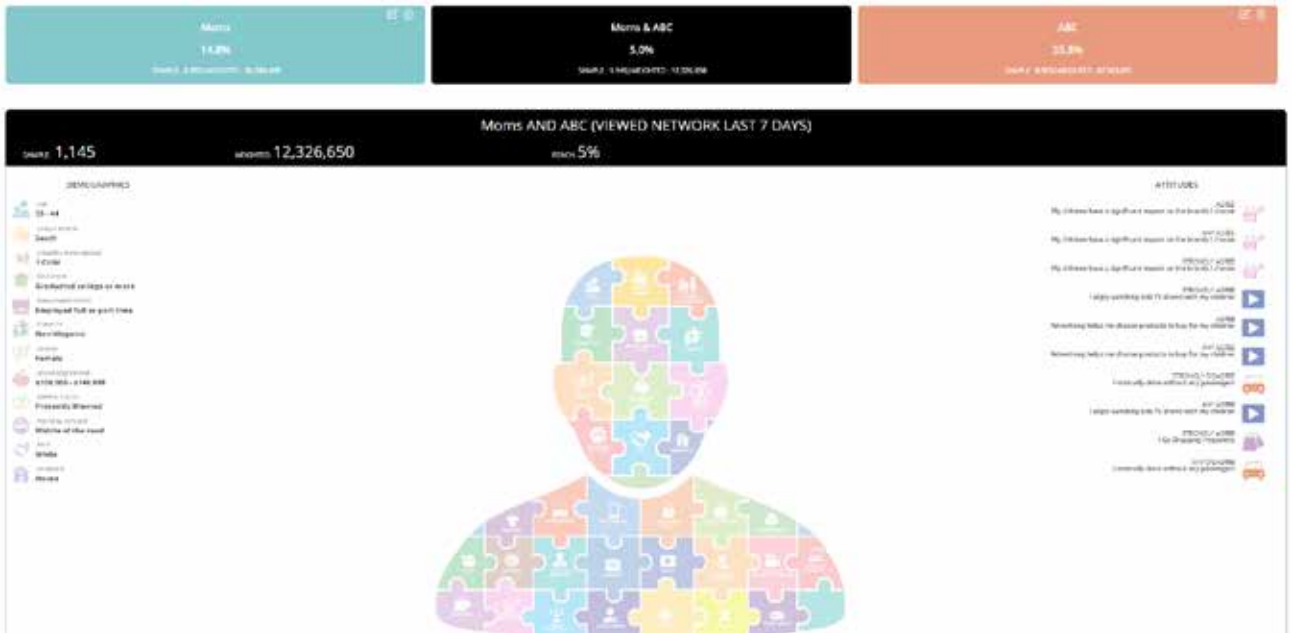
Entity: The expression that reflects the brand, medium, platform, content, publisher, or programming that you want to employ to reach an audience.

Base: The population of interest for this analysis. If you do not select a base, the default is the base of the study selected.

Once you have selected a Target Market and an Entity, hit the run button, which will trigger the analysis to occur and will generate your Overlap persona.



Simmons Insights Sales Catalyst: Target



On the screen, you will see the target market persona and the entity persona each with their respective core metrics (Sample, Weighted, Percentage of the Base). In the middle will be the overlap persona. The overlap persona is the profile of the people that meet the target market criteria AND the entity criteria. Currently, you will only be able to see the profile of the overlap persona.

The Target Market and Entity persona boxes each feature two icons that enable three features:

- Edit: Gives you the opportunity to change the title of the persona and then save this persona to your definitions.
- Remove: Clears the expression from the input, enabling you to enter a new one.



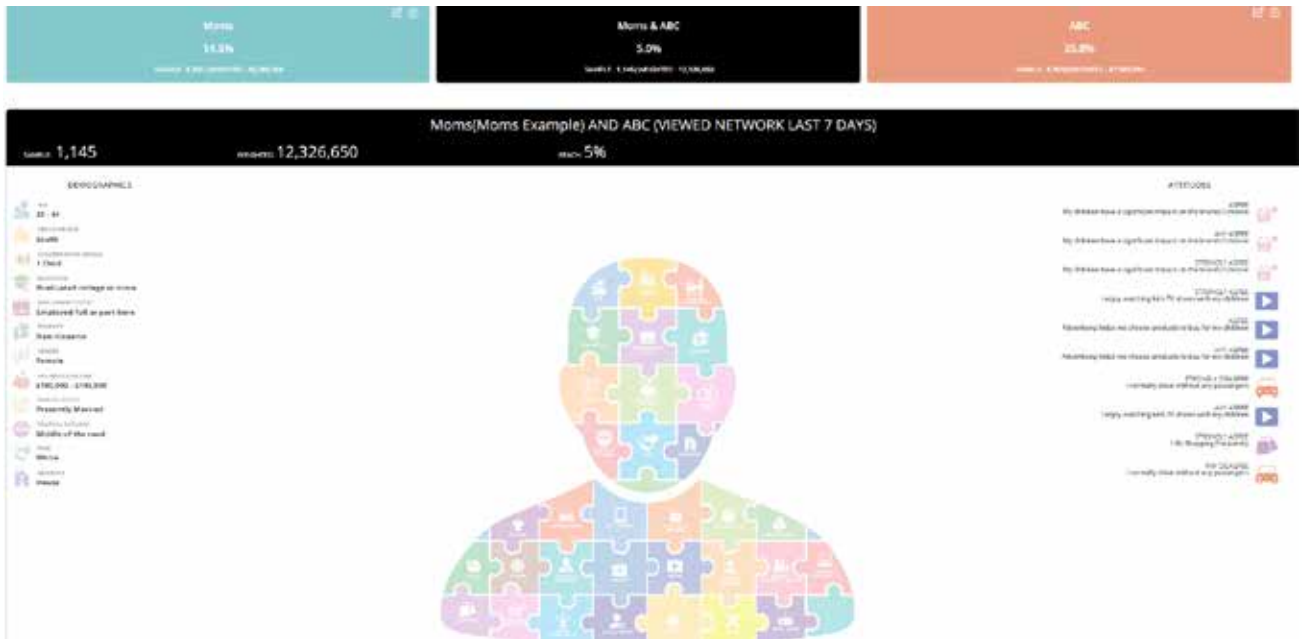
Simmons Insights Sales Catalyst: Target

Target Analysis: Profile

The first section features the profile of the persona in regard to demographics and psychographics. The data is generated on the screen based on a set of rules.

Demographics: The demographics shown are the ones with the highest vertical percentage, along with a sample > 60.

Psychographics: The psychographics shown are the ones with the highest index, with the limitations of sample > 60 and vertical percent > 10%. These psychographics are across all categories and across the entire scale of answers (from Strongly Agree to Strongly Disagree).



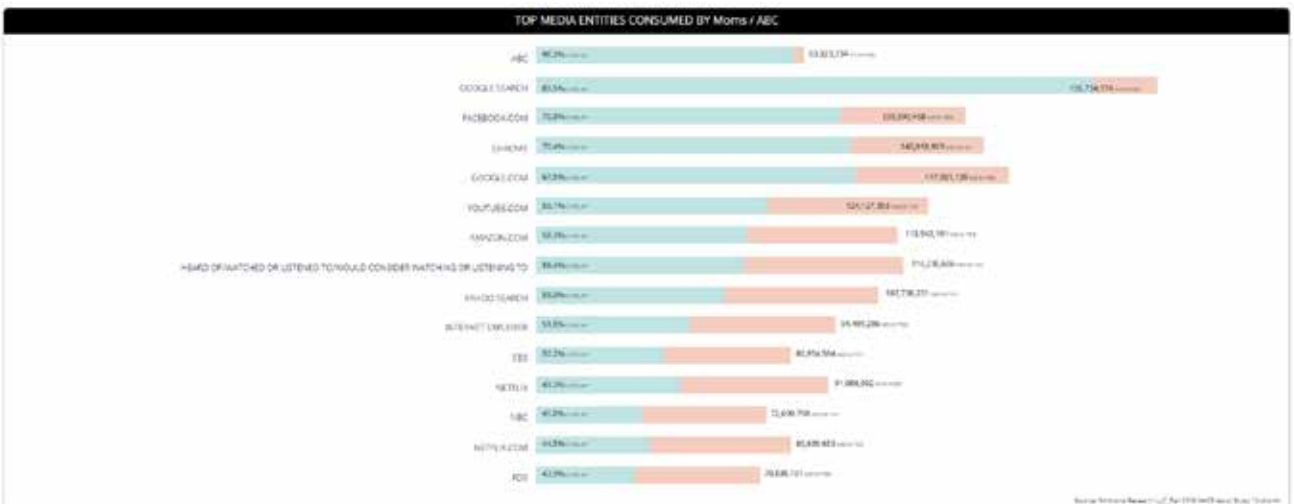
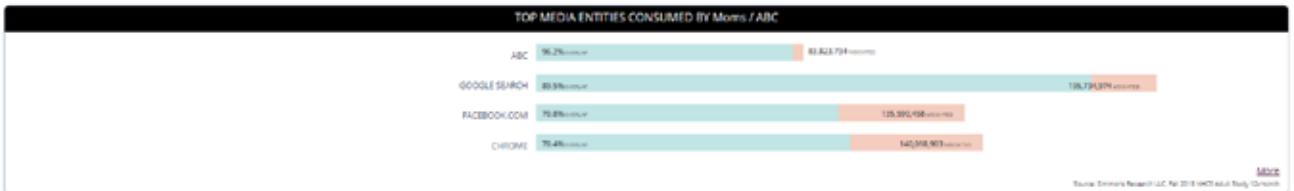
Simmons Insights Sales Catalyst: Target

Target Analysis: Media

The next section is a bar chart that highlights the top media consumed by the overlap audience. The initial display shows the top four, but you can click on the **MORE** at the bottom lower right to expand the list up to the top 16. The data is generated on the screen based on a set of rules, which includes sample > 0 and reach (vertical percent) > 10%. The media shown are those with the highest index.

Red bar: The number of consumers of the media property overall, across the base.

Blue bar: The percentage of the overlap audience that consumes this media.



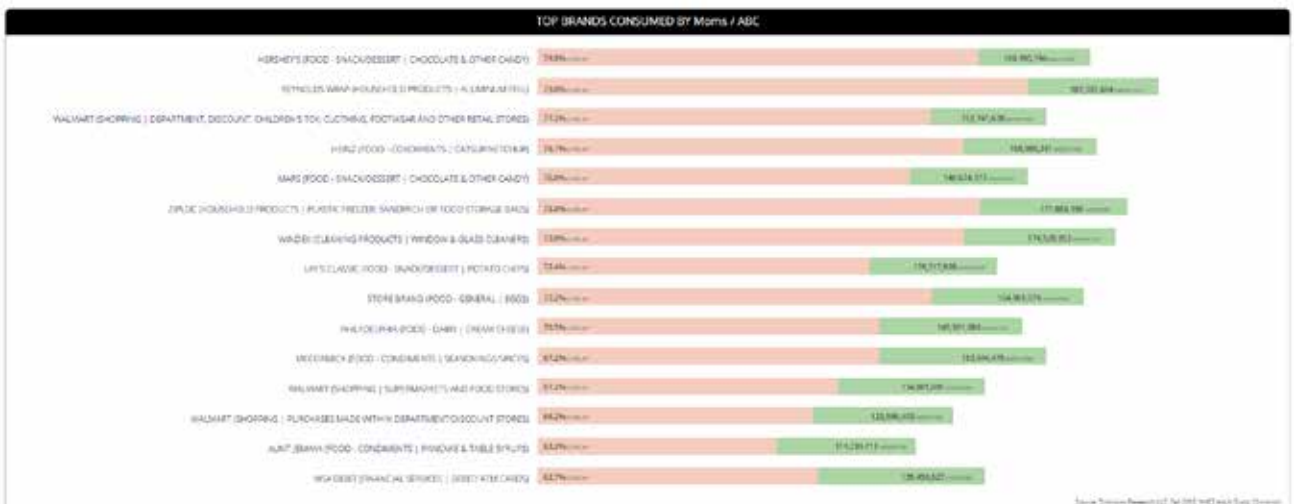
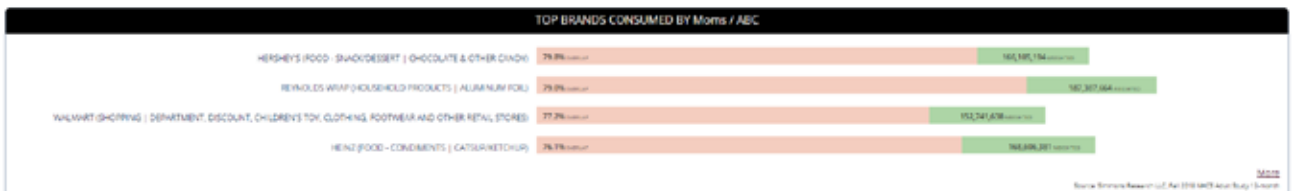
Simmons Insights Sales Catalyst: Target

Target Analysis: Brands

The next section is a bar chart that highlights the top brands consumed by the overlap audience. The initial display shows the top four, but you can click on the **MORE** at the bottom lower right to expand the list up to the top 15. The data is generated on the screen based on a set of rules, which includes sample > 0 and reach (vertical percent) > 10%. The media shown are those with the highest index.

Green bar: The number of consumers of the brand overall, across the base.

Red bar: The percentage of the overlap audience that consumes this brand.



Simmons Insights Sales Catalyst: Package

The Package module of Sales Catalyst highlights the relationship between the persona and the list of items available for packaging to an advertiser for media buys, sponsorship, or partnership purposes.

The Target Market and Entity that you defined in the Target section will be available here by default. If you wish to change either (or both) of your selections, you can click on the X in the upper corner of each, or hit the RESET icon to start anew.



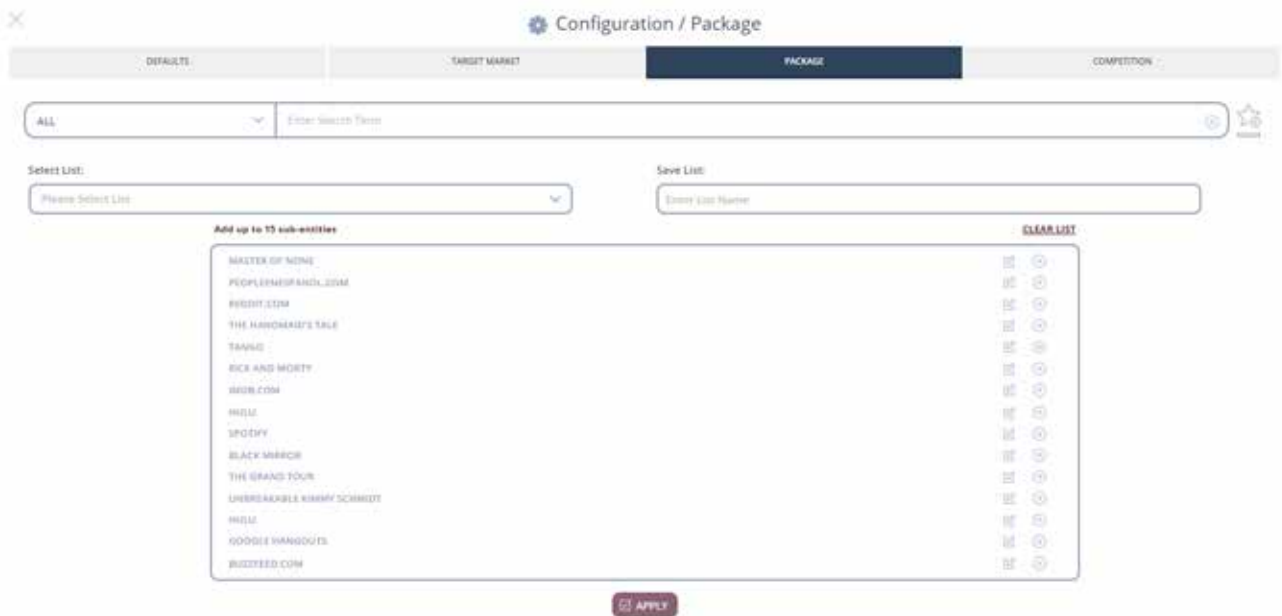
This section has a set of four screens – the carousel – that show four different ways of looking at your Target Market and the media (and brands) they consume.

The first carousel screen shows the 15 highest indexing media entities for the Target Market. Next to the Target Market name, there is a drop-down option to sort ascending or descending by index or reach.



Simmons Insights Sales Catalyst: Package

Next to the list of Media Entities in this list, you will see a cog. By clicking on this cog, you can edit this list, create your own lists, or open a list that you have previously created.




Within this screen, you can:


1. Clear the entire list
2. Remove some of the items.
3. Use Smart Search to create your own curated list.
4. Name and save your new list
5. Open a previously saved list

Note that there are a maximum of 15 entities that can be used within this list. However, these entities can include any of the data points measured within the base study, including brands, psychographics, media, and more.

Simmons Insights Sales Catalyst: Package

To clear an individual item, click on the circled X to delete it. 


To edit or save an item in the list, click on the edit button. 

To save the item in the list, click on the cloud icon. 

To clear the list and start from scratch, click CLEAR LIST. [CLEAR LIST](#)

To import a previous list, go to the Select List drop-down and choose your list.



To create a new list or add items to the current list, use the Smart Search bar to find your item, then click the ASSIGN button to add it to your list. 



When you have completed your list, give it a name, and click on the cloud arrow to save it. Now you can use this list for different Target Markets.



Then click the Apply button to see your results.



Simmons Insights Sales Catalyst: Package

Going back to the carousel screens, the first carousel screen now shows the new list for the Target Market. Next to the Target Market name, there is a drop-down option to sort ascending or descending by index or reach. If you hover over any of the items in the list, you will see a tool tip with additional information.



The second carousel screen shows the same list of chosen media (or other attributes), but this time it is for the overlap between the Target Market and the entity.



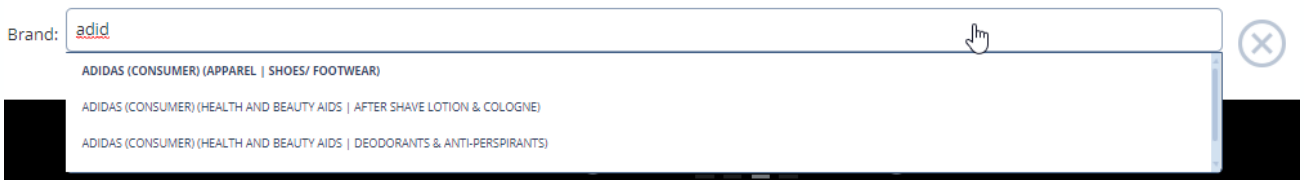
As with the first list, you can sort using several options. The index will continue to be the number displayed, but hovering over any of the bars will bring up the tool tip with more information.



Simmons Insights Sales Catalyst: Package

The third carousel screen incorporates brand consumers into the mix. For this next screen, you will need to add a brand by clicking on the plus icon within the brand space.

That will bring up a search bar where you can enter your selected brand.



Select the brand, and you will see the brand itself as well as its category added to your set of icons across the top of the screen. Click run to generate your new report.

The two green icons show penetration across the base for the brand and the category.



On the left is the overlap persona versus brand consumers; on the right, the overlap persona versus brand prospects. With both of these, you can sort by percent or index, and tooltip functionality is enabled.

Simmons Insights Sales Catalyst: Package

The fourth carousel screen looks at the overlap of your Target Market with the selected brand (consumers on the left and prospects on the right) versus the list of entities that were selected.

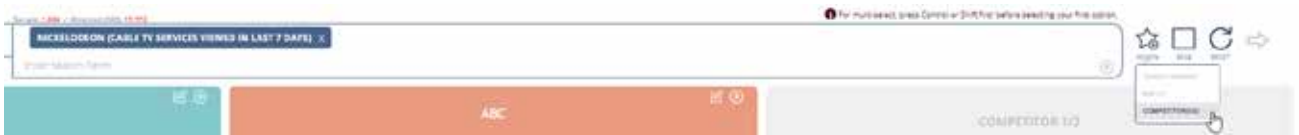
Each of the bar charts can be sorted by percent or index, ascending or descending, and will show pop-up tooltips when you hover over a particular bar.



Simmons Insights Sales Catalyst: Compare

The Compare module of Sales Catalyst enables you to compare your Target Market and your Entity versus a competitive set.

With the Share of Base and Target Market section, you can select up to 3 competitors by typing them into the Smart Search bar, then clicking the Assign icon and selecting Competitor.



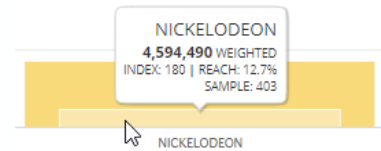
After you have set up your competitors, click the red arrow (RUN) icon to build your report.



The first set of images illustrate a couple of comparisons:

1. The dark bars show the total overall size of each of the competitors.
2. The light bars within each show the size of your Target Market overlap with each of those competitors.

For each of these, you can hover over it to see a pop-up tooltip with additional information



Simmons Insights Sales Catalyst: Compare

The bubble chart allows the user to select a category, currently Media Preferences, Activities, or Sports Interests, and compare the level of interest or participation of the entity persona and the competitor personas in regard to the base or the target market.

In terms of the visualization, here is how to read the chart:

- **Y-Axis – Index.** This is the index of the data variable and its overlap with the selected audience.
- **X-Axis – Percent.** This is the percentage overlap between the data variable and the selected audience.
- **Bubble Size – Sample-Weighted.** The size of the bubble increases with the number of people that partake in both the selected data group and are a member of the selected audience.
- **Legend –** Your main entity and up to 3 competitors can be viewed on the bubble chart. Each one has its own color associated to its bubbles.

The user can choose to turn an input on or off for the bubbles. For example, if you click on the legend for an input, it no longer appears in the bubble chart.

The pop-up tool tip will provide the metrics of the bubble.

You can change the category drop down (left) to any of the three categories. The drop down on the right enables you to change the audience to either your base or your Target Market.



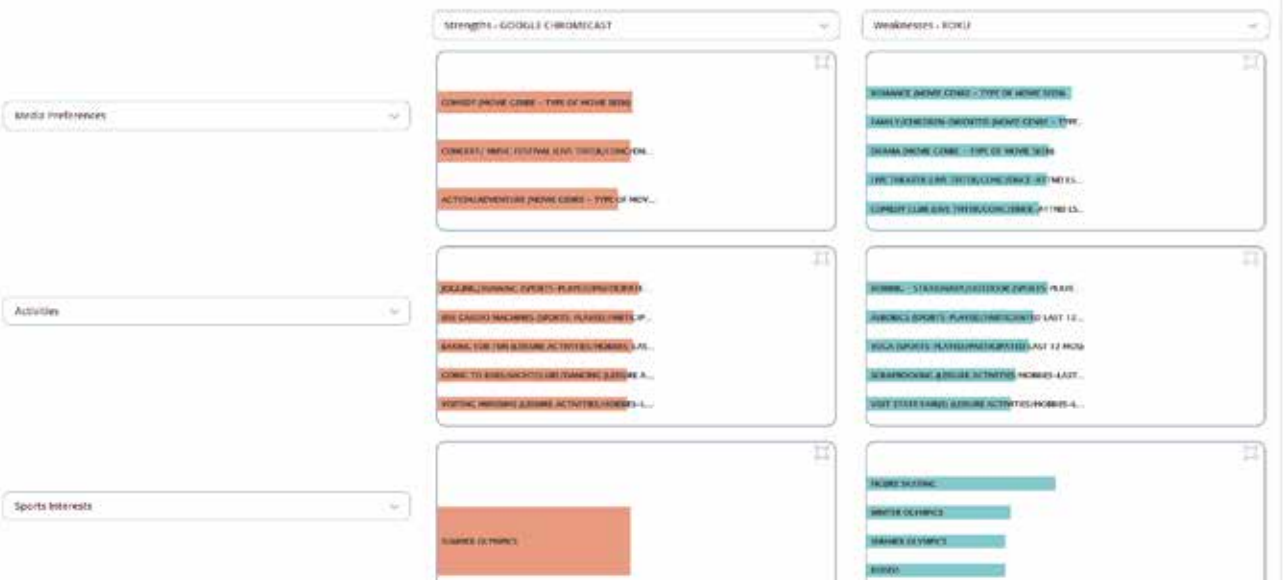
Simmons Insights Sales Catalyst: Compare

Strengths/Weaknesses Chart

This section of the Compare module gives users the ability to compare the strengths of a selected input (Entity OR Competitor 1 OR Competitor 2 OR Competitor 3) in regard to overlap or reach into the target market.

For example, this chart highlights that Google Chromecast's strength for reaching the Female target audience is to focus on people that like Comedy movies and going to concerts, that jog and bake for fun, whereas Roku needs to focus on the same attributes and avoid sporting events such as Summer Olympics or Women's Tennis. The idea is to start setting the foundation for a story of threats and opportunities. This can also be read as identifying attributes that are strong for Google but weak for Roku so Google can entice Roku consumers to switch or so Roku can hyper focus on their niche audience and keep Google away from their most valued consumers.

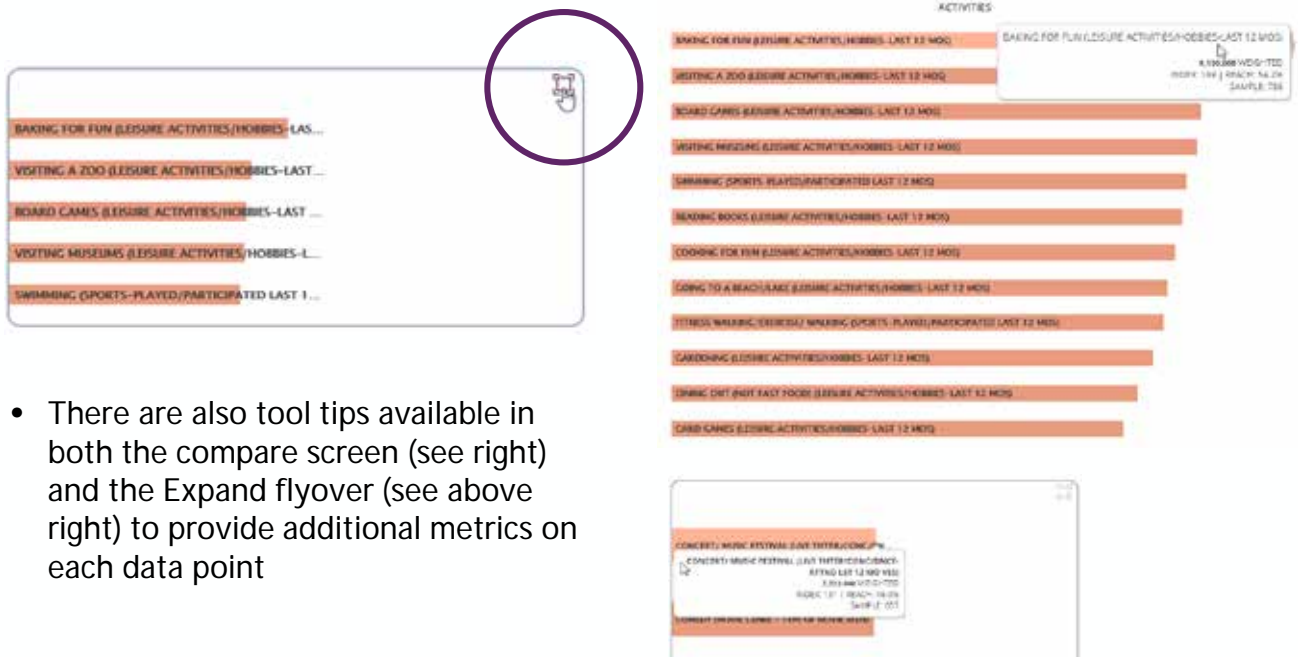
STRENGTHS & WEAKNESSES



Simmons Insights Sales Catalyst: Compare

Strengths/Weaknesses Chart

- The default metric is that a data point is a strength if the sample is greater than 60, the reach is greater than 30%, and the index is greater than 120 (data is then listed in order of highest index). This means a weakness is sample greater than 60, reach less than 30% (data is then listed in order of highest index), and the index can be above or below 120. We did not set an index requirement as the predominant metric for being a weakness would be the lack of reach into the target market.
- In a future iteration, the end user will be able to set their own parameters for strengths and weaknesses.
- Default attributes are Media Preferences, Activities and Sports interests.
- This also features a deep dive or expand where the user can view a Strengths or Weaknesses chart with all relevant bars in a larger view.



- There are also tool tips available in both the compare screen (see right) and the Expand flyover (see above right) to provide additional metrics on each data point

Simmons Insights Sales Catalyst: Compare

Activities drop-down menu includes:

- Fantasy Sports – Participated Last 12 Months
 - Baseball
 - Basketball
 - Football
 - Hockey
- Leisure Activities/Hobbies – Last 12 Months
 - Antique Shopping/Shows
 - Baking For Fun
 - Barbecuing
 - Bird Watching
 - Board Games
 - Card Games
 - Cooking For Fun
 - Dining Out (Not Fast Food)
 - Education Courses
 - Fantasy Sports
 - Gardening
 - Go Carting
 - Going To Bars/Nightclubs/Dancing
 - Going To A Beach/Lake
 - Listening To Music
 - Needlework/Quilting
 - Painting, Drawing, Sculpting
 - Photography
 - Playing Bingo
 - Playing Musical Instrument
 - Reading Books
 - Reading Comics
 - Reading Gaming Magazines
 - Scrapbooking
 - Tailgating
 - Visit State Fair(s)
 - Visiting An Aquarium
 - Visiting Museums
 - Visiting A Zoo
 - Woodwork/Furniture Refinishing
- State Lottery – Bought Tickets Last 12 Months
 - Yes
 - No
- Sports – Participated Last 12 Months
 - Aerobics
 - Archery
 - Auto Racing Or Rallying
 - Backpacking/Hiking
 - Baseball
 - Basketball
 - Bicycling - Mountain/Road
 - Bicycling - Stationary
 - Billiards/Pool
 - Bowling
 - Boxing
 - Camping Trips (Overnight)
 - Canoeing/Kayaking
 - Downhill/Cross Country Snow Skiing
 - Fitness Walking/Exercise/ Walking
 - Fly Fishing
 - Football
 - Fresh Water Fishing
 - Golf
 - Hockey
 - Horseback Riding
 - Hunting
 - Ice Skating
 - In-line Skating/Roller Skating
 - Jet Skiing/Wave Running/Water Biking
 - Jogging/Running
 - Karate/Martial Arts/Kickboxing
 - Motorcycling
 - Mountain/Rock Climbing
 - Power Boating
 - Racquetball
 - Rowing - Stationary/Outdoor
 - Sailing
 - Salt Water Fishing
 - Skateboarding
 - Skin Diving Or Snorkeling
 - Snowboarding
 - Snowmobiling
 - Soccer
 - Softball
 - Surfing/Windsurfing
 - Swimming
 - Target Shooting
 - Tennis
 - Use Cardio Machine
 - Volleyball
 - Water Skiing
 - Weight Training
 - Yoga

Simmons Insights Sales Catalyst: Compare

Media Preferences drop-down menu includes:

- Live Theater/Concerts/Dance – Attended Last 12 Months
 - Comedy Club
 - Concert/Music Festival
 - Dance Performance
 - Live Theater
- Movie Genre – Type of Movie Seen
 - Action/Adventure
 - Animation
 - Comedy
 - Documentary
 - Drama
 - Family/Children-oriented
 - Fantasy
 - Foreign Language/Independent
 - Horror
 - Mystery/Suspense/Thriller
 - Romance
 - Science Fiction

Sports Interests drop-down menu includes:

- Sports Interest (Very OR Somewhat Interested)
 - Summer Olympics
 - Winter Olympics
 - Liga Mexicana De Futbol (Mexican Soccer League)
 - Mexican Men's National Soccer Team
 - Other International Soccer
 - Major League Soccer (MLS)
 - U.S. Men's National Soccer Team
 - U.S. Women's National Soccer Team
 - National Football League (NFL)
 - College Football
 - Arena Football League (AFL)
 - Major League Baseball (MLB)
 - College Baseball
 - National Basketball Association (NBA)
 - Women's National Basketball Assoc (WNBA)
 - NBA Gatorade League (NBA G-league)
 - College Basketball
 - NASCAR Racing
 - NASCAR Camping World Truck Series
 - Monster Energy NASCAR Cup Series
 - NASCAR Xfinity Series
 - Any NASCAR
 - Indycar Series
 - NHRA (National Hot Rod Association)
 - IMSA Weathertech SportsCar Championship
 - Supercross
 - Professional Golfers' Association (PGA)
 - Ladies Professional Golf Association (LPGA)
 - National Hockey League (NHL)
 - College Hockey
 - Men's Tennis
 - Women's Tennis
 - Boxing
 - Ultimate Fighting Championship (UFC)
 - Lucha Libre (Mexican Wrestling)
 - Wrestling (WWE/Impact)
 - Other College Sports
 - Figure Skating
 - Horse Racing
 - Lacrosse
 - Poker Championships
 - Professional Bull Riders (PBR)
 - Rodeo

Simmons Insights Sales Catalyst: FAQs

What is a target market?

Target market is an input field where you can specify the persona you want to reach whether that is the consumer of a brand (i.e. Perrier consumer) or a behavioral persona (i.e. millennial mom or female tennis player).

What is an entity?

The entity is the input field where you can specify the brand, medium, platform, content, publisher, programming, you want to employ to reach an audience, specifically, the target market.

What is a base?

The base gives you the opportunity to set the universe in which you want to analyze the data. For example, if you are looking at sparkling water brands, perhaps you want to narrow the universe to only those that consume sparkling water. Or if you want to work with an adult beverage company, you only want to analyze a universe of individuals 21+.

Some data loads before I hit run, why do I need to press the run button?

We want to provide persona information once you assign an expression to an input so you can decide if the metrics meet your needs before continuing with the analysis.

Is the settings cog different per module?

The settings cog will take you to the configuration screen. The top settings cog will take you to the default settings section. Depending on the module or where you access the cog from, it will take you to the section of the configuration screen that is specific to the actions you are taking in the platform.

The initial release only has a configuration screen for the Package module as it requires the most flexibility. Future releases will include the remaining modules.

Simmons Insights Sales Catalyst: FAQs

What are defaults?

We pre-set defaults so the visualizations will load and provide you with immediate opportunities for insights. With the default configurations, you can override these settings and choose metric values that best meet your needs.

As we build out user level functionality, there will be the opportunity to save these defaults. For now, they are per session.

How are the attitudes determined on the Target module?

The sample size of the persona and the data in question (i.e. all categories of attitudes and all levels of agreement) needs to be 60, the percentage overlap between the persona and statements needs to be 10% or greater, and lastly, the persona/statement overlap with the highest index.

What is the blue bar in the brand and media bar charts on the Target module?

The blue bar is the percentage of the brand or media that is consumed by the audience. The red bar is the weighted size or number of people that consume the brand or media.

What does the “more” button do on the Target module for the brand and media sections?

The “more” button increases the number of data points in the bar chart. With each click, 4 more will appear, up to 15.

Why are there two settings cogs on the package screen?

The top one is the universal settings cog and, in a future iteration, will take you to the that specific module.

The cog in the Package carousel will take you to specifically the settings for the package list so you can create, select, or edit the list used in this carousel.

Simmons Insights Sales Catalyst: FAQs

What is a Prospect?

If the sample size of the brand selected is greater than 500, then the prospect is a new data point generated by MRI-Simmons known as predictive consumer insights. This is a predictive segment that includes consumers that do not currently consume the selected brand but show a high propensity to consider or purchase the brand. These predictive segments are driven by consumer psychographics that have the most positive and negative association with known brand purchase or usage.

If the sample size of the brand selected is less than 500, then the prospect is the equation Category Consumer NOT Brand Consumer. This means the prospect consumes the category or a brand within the category but does NOT consume the brand selected.

Why are there asterisks on the package and competition screen?

The Target module is curated so that data only appears if the sample size is greater than 60. The Package and Compare modules do not have this sample restriction so we provide the asterisks to highlight that the sample may be unstable due to its small size.

Why is the apply button not activated in the package configuration screen?

The apply button is only active when the list you want to apply has been saved. If you create or modify a list and do not save it, then you cannot apply it to the package screen.

Simmons 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.

Enter Connect Name	SAMPLE	WEIGHTED (000)	VERTICAL %	HORIZONTAL %	NEXT
TACO BELL (FAST FOOD RESTAURANTS - VISIT ANY)	5,989	55,787	100%	27.5%	132
TACO BELL (FAST FOOD RESTAURANTS - VISIT MO)	2,216	24,326	39.4%	100%	88
TACO BELL (FAST FOOD RESTAURANTS - VISIT ALSO)	3,679	45,448	80.9%	100%	303
TACO BELL (FAST FOOD RESTAURANTS - VISIT ANY)	5,989	56,787	100%	100%	303

	2 BROKE GIRLS (CONSUMER)		
	Sample	Weighted(000)	Vertical %
Total	2,150	23,866	100.0%
2 BROKE GIRLS (BCAST or SYN or ATTN or FREO)	2,150	23,866	100.0%
2 BROKE GIRLS (CBS) (ONCE A WEEK PROGRAMS - VIEW PAST 7 DAYS)	1,151	12,530	52.5%
2 BROKE GIRLS (OTHER STATIONS, NOT CBS) (MONDAY-FRIDAY PROGRAMS - VIEW YESTERDAY)	891	10,340	43.3%
2 BROKE GIRLS (WEEKEND) (OTH STNS, NOT CBS) (ONCE A WEEK PROGRAMS - VIEW PAST 7 DAYS)	575	6,386	26.8%
ONCE A WEEK PROGRAMS - FULL ATT: 2 BROKE GIRLS (CBS)	503	4,681	19.6%

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.

Simmons Insights Brand Consumers, Prospects, & Non-Prospects*

Clients that subscribe to Brand Catalyst will have access to **Brand Prospects** and **Brand Non-Prospects**, in addition to access to **Brand Consumers**, which means all three of these segments for each measured brand will also be available in Insights for Crosstab, Quick Reports, Data Haul, etc. They require the additional subscription because unlike the aforementioned consumers, these segments are NEW data points. Consumers are the union of data points that a client could have created themselves. Prospects and Non-prospects are new in the sense that Simmons performed an analysis and generated them. The client cannot replicate what we did with basic code box functions.

Brand Prospects: Predictive segment that includes consumers that do not currently consume the selected brand but show a high propensity to consider or purchase the brand. These predictive segments are driven by consumer psychographics that have the most positive and negative association with known brand purchase or usage.

Brand Non-Prospects: Predictive segment that includes consumers that do not currently consume the selected brand and have the least propensity to consider or purchase the brand. These predictive segments are driven by consumer psychographics that have the most positive and negative association with known brand purchase or usage.

✕

- ✓ TACO BELL (CONSUMER) (DINING | FAST FOOD & DRIVE-IN RESTAURANTS) (DINING | FAST FOOD & DRIVE-IN RESTAURANTS)
- ✓ TACO BELL (NON-PROSPECT) (DINING | FAST FOOD & DRIVE-IN RESTAURANTS) (DINING | FAST FOOD & DRIVE-IN RESTAURANTS)
- ✓ TACO BELL (PROSPECT) (DINING | FAST FOOD & DRIVE-IN RESTAURANTS) (DINING | FAST FOOD & DRIVE-IN RESTAURANTS)

✕

- ✓ 2 BROKE GIRLS (CONSUMER) (TELEVISION PROGRAMS) (TELEVISION PROGRAMS)
- ✓ 2 BROKE GIRLS (NON-PROSPECT) (TELEVISION PROGRAMS) (TELEVISION PROGRAMS)
- ✓ 2 BROKE GIRLS (PROSPECT) (TELEVISION PROGRAMS) (TELEVISION PROGRAMS)

*New and available to Brand Catalyst subscribers only.

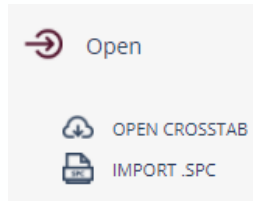
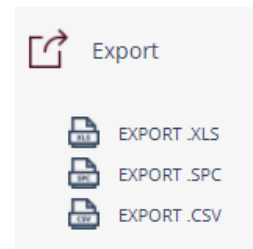
Simmons Insights Basics

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.

- ✓ A&E
- ✓ ADULT SWIM
- # AARP, THE MAGAZINE
- # ALL RECIPES

Simmons 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.

Function	COUNTRANGE
Description	Count Coding
Format	COUNTRANGE (keywords, nLower, nUpper)
Example	COUNTRANGE (AROBICYR, FLWKYR, YOGAYR, 2, 3)

Function	MEANSORE
Description	Average: Mean
Format	MEANSORE (keyword, midpoint)
Example	MEANSORE (LOTACR10, 10, LOTACR6, 8, LOTACR4, 5, LOTACR2,3)

Function	MEANSORENOZERO
Description	Average: Mean, Exclude Zeros
Format	MEANSORENOZERO (keyword, midpoint)
Example	MEANSORENOZERO (LOTACR10, 10, LOTACR6, 8, LOTACR4, 5, LOTACR2,3)

Function	MEANSORENONULL
Description	Average: Mean, Exclude Nulls
Format	MEANSORENONULL (keyword, midpoint)
Example	MEANSORENONULL (LOTACR10, 10, LOTACR6, 8, LOTACR4, 5, LOTACR2,3)

Simmons Insights Functions

Function **MEDIAN**

Description Average: Median, Continuous

Format MEDIAN (VOLUME (keyword, midpoint))

Example MEDIAN (VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3))

Function **MEDIANNOZERO**

Description Average: Median, Continuous, Exclude Zeros

Format MEDIANNOZERO (VOLUME (keyword, midpoint))

Example MEDIANNOZERO (VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3))

Function **MEDIANDISCRETE**

Description Average: Median, Discrete

Format MEDIANDISCRETE (VOLUME (keyword, midpoint))

Example MEDIANDISCRETE (VOLUME (LOTACR10, 10, LOTACR6, 8, LOTACR4, 5, LOTACR2,3))

Function **MEDIANDISCRETENOZERO**

Description Average: Median, Exclude Zeros, Discrete

Format MEDIANDISCRETENOZERO (VOLUME (keyword, midpoint))

Example MEDIANDISCRETENOZERO (VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3))

Function **NTILE**

Description N-Tile Sample

Format NTILE(VOLUME(keyword), # of Groups, Selected Group)

Example NTILE(VOLUME(LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3)4,2)

Function **NTILEWT**

Description N-Tile Weighted

Format NTILEWT(VOLUME(keyword), # of Groups, Selected Group)

Example NTILEWT(VOLUME(LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3)4,2)

Function **VOLUME**

Description Volume

Format VOLUME (keyword, midpoint)

Example VOLUME (LOTACR10,10,LOTACR6,8,LOTACR4,5,LOTACR2,3)

Simmons 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

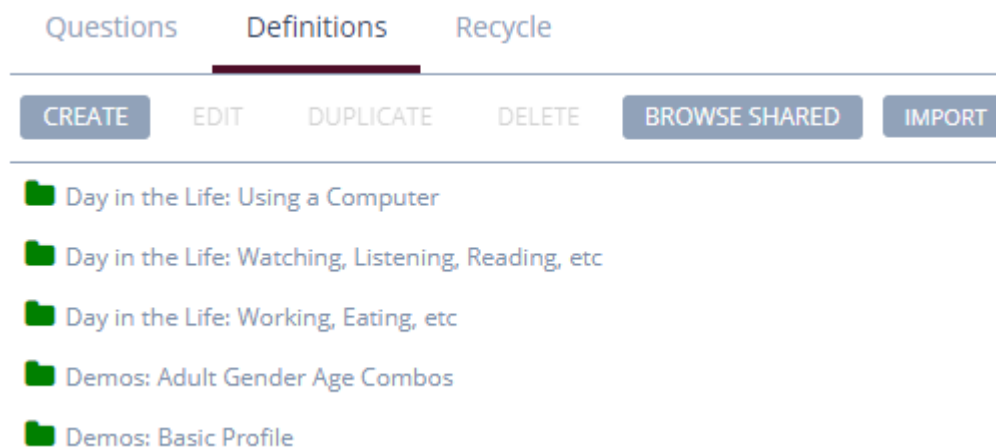
To Create a Volume Variable

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

Simmons Insights Definitions



This is the storage location for saved target definitions. These can be dragged and dropped into the Rows/Columns/Bases as well as the Coding Box.

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 Simmons Insights. They are provided by Simmons Research 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.

Simmons 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.

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