Emotions are critical to customer experience, but tricky to measure. This paper discusses what we mean by emotion, how we can measure it, and how these tools can apply in an operational customer experience framework.
You’ve almost certainly left a store feeling that the service was not what you expected. You might have felt like the salesperson was more interested in hearing about their colleague’s weekend, as opposed to helping you. Are you feeling angry or unhappy? More importantly, will these feelings translate to not shopping this store again? Emotions have an air of mystery. It is often implied, if not directly stated, that behavior based on emotion is “hot”, irrational, illogical, and that people cannot explain or articulate how they feel. This situation poses a bit of challenge for companies. It’s difficult to use customers’ emotions to inform actions if those customers can’t tell you what they’re feeling and are behaving irrationally. Fortunately, much of these beliefs about emotions are myths and it is indeed possible to get people to articulate their feelings; there are meaningful discernable patterns in the experience of emotions. By applying a scientific approach to emotion, it is possible to get an understanding of how emotions operate, how to measure them, and how to respond to customer behavior by taking them into consideration.

Defining Emotion

In simplest terms, an emotion is a feeling produced as a result of an experience. You walk into a hotel and the front desk clerk greets you with a smile and a cookie, and you get a warm fuzzy feeling and think you could stay there for a while. You’re walking in a store, where things are all out of place and something falls off the shelf, barely missing your head. You make a bee-line to find a manager. These are examples of experiences that evoke emotions whether that is happy or relaxed, troubled or angry.

A true understanding of what these emotions mean for customers is essential to taking the right action. And this is the benefit of applying a scientific approach; scientific ways of organization and categorization demystify complex phenomena. Here are some ways we can systematically characterize emotions.

- **Emotions vary in valence**
  This is perhaps the most straightforward aspect of emotions. They are either positive or negative.

- **Emotions vary in level of consciousness**
  At the less conscious level, emotions occur fairly quickly and automatically. At this level, emotion is mostly about valence and involuntary behaviors. When you are in the store, and are nearly hit by falling product, you have a reaction. Your reaction may include your heart rate increasing, opening your eyes widely, and hopping out of the way. At a more conscious level, emotions involve realization, interpretation, and acting on your feelings.

- **Emotions vary in levels of arousal**
  Emotions exist a continuum from low arousal (e.g. boredom) to high arousal (e.g. rage), which involve more energy, moving you to action.

Emotion Measurement

Given the above, what does this mean for the measurement of emotion? As with other psychological processes, how we measure constructs should match the process. At the most basic level then, this suggests that to capture the full range of emotion we need to measure some automatic, not entirely conscious reactions as well as reactions that reflect some thinking.

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Measuring the less conscious aspect of emotion

The most well-known measure of the automatic, less conscious aspect of emotion is facial coding. Facial coding is based largely on research by Paul Ekman, which identified facial expressions consistent with 6 basic emotions (i.e. happiness, fear, sadness, anger, surprise, disgust). These six basic emotions are thought to be biologically rooted, and as such the facial expressions associated with them are universally expressed and understood. There is some debate about the universality of these expressions, and whether these emotions are consistently expressed in these ways. (Lisa Feldman Barrett, a psychologist at Boston College, has written extensively about this issue. See for example, Feldman Barrett, 2006). Despite the debate, clearly emotion is, to some extent, expressed in facial expressions. Although there may be instances where we are happy but do not smile, or where a smile is an indicator of embarrassment rather than happiness, facial expression and thus facial coding provides some information about a person’s emotional state.

With that said, facial coding gets at aspects of emotion that are basic. That is facial coding will not be sufficient to distinguish between more nuanced emotions like inspiration and satisfaction. Furthermore, in the real world, facial expressions of emotion are often subtle and fleeting. (This is especially true in research, where the stimuli we expose people to is generally not mind blowing or life threatening and thus the range of emotion is fairly narrow.) Thus, capturing basic emotions as expressed on the face, requires either a person with expertise in coding human faces or an automated program.

Though it is possible that the less conscious aspects of emotion may be captured with other types of physical measurements, such as psychophysiology (e.g. heart rate, skin conductance) and neuroimaging, this type of research has not yet been able to clearly and consistently distinguish between different emotions.

Measuring the less conscious aspect of emotion

The more conscious aspects of emotion a subjective experience, subject to interpretation, evaluation, labeling and revision. We perceive our own emotions in a way that is not entirely dissimilar from the way we decide that a person is a jerk. That is, we take into consideration the general feeling of good versus bad, what we know about what different emotions looks like, when they are likely to occur, the context, and we infer our emotion. In the example above of avoiding a near miss with a falling object, the emotion of relief comes from the negative feeling, our understanding of what events just took place, knowing at some level that a sigh and thinking about an alternative outcome that is much worse are all signs of relief. Of course, figuring that out happens very quickly, but it does take some conscious awareness.

Thus, if we are to measure emotions like excited, nervous, relaxed and stressed, we need a measure that requires individuals to directly report on their emotion state. As discussed above, beyond positive and negative, emotions vary on arousal. And the combination of valence and arousal is more meaningful than considering either in isolation. For example, worry and unhappiness, are both negatively valenced but differ in their levels of arousal. This difference
in levels of arousal has implications for how customers think and are likely to behave as a function of their emotions.

**Applying emotion to Operational Customer Experience Management**

Emotion can become a powerful input into actions that companies can take around customer experience. Below are a few specific applications:

- **Impacting how companies close the loop.** Companies can adapt how they close the loop by leveraging emotions. Focusing on emotions is helpful in prioritizing problems and taking the right actions. For example, for a customer who reports being extremely worried, is experiencing high levels of arousal and likely would benefit from quick action that minimizes that negative energy. On the other hand, a customer who reports being extremely unhappy, because they are less aroused, may not need immediate action.

- **Segmenting customer data by emotions.** Segmenting customer experience data by emotion can be helpful for understanding what situations evoke certain emotions and their impact on satisfaction. Emotions may also provide ide valuable insight to understanding key customer profiles. Which of your consumer segments are prone to negative emotions that will require effort to address? Who are your consumers who can be inspired by simple actions and who will therefore spread the word about you?

- **Combine emotions with key metrics to more strongly predict outcome variables.** The emotional construct combined with key metrics could increase predictive power, enabling better insight into key behaviors such as review writing, recommendations, and return visits.

**For More Information:**

Collette Eccleston – [ceccleston@lrwonline.com](mailto:ceccleston@lrwonline.com)

Tristina Keith – [tkeith@lrwonline.com](mailto:tkeith@lrwonline.com)