



Claritab

Report Descriptions & Report Prompts Overview



Claritab

Report Descriptions & Report Prompts Overview

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OVERVIEW

This document provides an overview of the available Claritab reports, report prompts, and report output.

REPORT DESCRIPTIONS

This section provides a summary of the reports that are currently available in the Claritab builder.

Click on a report name to go to the detailed description:

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Account Share Report

Description

The percentage of account mentions held by each institution for the specified product.

Note: Column percentages total 100%.

Purpose

Displays a list of institutions' "piece of the pie" for accounts of a specific product.

Sample Report Output

Account Share Report				
Service Types: Any Deposit Service				
Totals	Total	19Q2	19Q3	19Q4
Total in Sample	11,460	3,820	3,820	3,820
Total with Service	10,417	3,490	3,453	3,474
Total Service Relationships	33,056	11,313	10,702	11,041
Avg Dollars per Household	41,992	50,665	35,707	39,605
Institution Name	Total	19Q2	19Q3	19Q4
Institution A	2,060	713	604	743
Institution B	1,677	549	435	693
Institution C	1,499	511	396	592
Institution D	1,320	470	413	437
Institution E	1,316	509	428	379
Institution F	1,170	416	382	372
Institution G	904	334	297	273
Institution H	863	240	291	332
Institution I	753	286	256	211
All Others	21,494	7,285	7,200	7,009

How to Interpret the Sample Report Output:

- In Q4 2019, 3,474 households reported having any deposit service; these households had a total of 11,041 deposit services.
- Of the 11,041 accounts mentioned previously, 437 were held at Institution D.
- In Q4 2019, 7,009 of deposit services were held at All Other Institutions not individually listed in the table.

Balances per Household Report

Description

The mean or median balance per household for each product, regardless of product ownership; that is, whether or not those households have a particular product. The base for this report is the total in sample.

Purpose

Shows the balance amounts for each product.

Sample Report Output

Balances per Household Report				
Measure: Mean Value				
Totals	Total	19Q2	19Q3	19Q4
Total in Sample	11,460	3,820	3,820	3,820
Total in Sample (Weighted)	11,458	3,820	3,819	3,819
Variables	Total	19Q2	19Q3	19Q4
Major Service Groups:				
Any Deposit Service	70,535	78,582	64,410	68,012
Any Credit Service	106,791	100,276	101,958	115,138
Non-Mortgage Credit Service	33,601	29,474	36,166	34,562
Deposit Services:				
Checking/Savings	53,519	61,184	48,372	50,401
DDA/Transaction Services:				
All DDA/Transaction Services	11,423	12,095	12,040	10,864
Savings Services:				
All Savings Accounts	74,400	81,708	67,673	72,920
Regular Savings Accounts	38,275	43,269	35,538	35,280
CDs (Time Deposit Accounts)	105,928	104,437	107,082	100,280

How to Interpret the Sample Report Output:

- In Q4 2019, 3,820 households were interviewed in this market.
- In Q4 2019, the mean balance per household for *Checking/Savings* accounts was \$50,401.

Balance per user Report

Description

The mean or median balance per user household for each product. User households are dependent upon product ownership of each particular product. Only user households that report a valid balance are included in the base.

Purpose

Shows the balance amounts of user households for each product.

Sample Report Output

Balances per User Report				
Measure: Mean Value				
Totals				
	Total	19Q2	19Q3	19Q4
Total in Sample	11,460	3,820	3,820	3,820
Total in Sample (Weighted)	11,458	3,820	3,819	3,819
Variables				
	Total	19Q2	19Q3	19Q4
Major Service Groups:				
Any Deposit Service	72,781	80,851	67,410	70,012
Any Credit Service	111,459	101,376	113,988	119,154
Non-Mortgage Credit Service	34,363	30,394	37,196	35,559
Deposit Services:				
Checking/Savings	55,270	62,084	51,472	52,208
DDA/Transaction Services:				
All DDA/Transaction Services	12,635	13,895	12,670	11,332
Savings Services:				
All Savings Accounts	76,154	83,708	69,641	74,910
Regular Savings Accounts	39,364	45,261	36,537	36,180
CDs (Time Deposit Accounts)	106,979	106,397	110,802	104,390

How to Interpret the Sample Report Output:

- In Q4 2019, the mean balance per user household for *Checking/Savings* accounts was \$52,208.

Demographic Report

Description

Any demographic or custom variable as the row cross-tabbed against another demographic or custom variable.

Purpose

Analyze a specific demographic variable against another demographic variable (predefined or custom.)

Sample Report Output

Demographic Report								
Row Category: Household Size								
Column Variable: Age								
Measure: Frequency								
Totals	Total	< 20	20-24	25-29	30-34	35-39	40-44	45-49
Total in Sample	3,820	21	155	290	344	403	344	254
Total in Sample (Weighted)	3,812	24	133	269	351	401	319	389
Household Size	Total	< 20	20-24	25-29	30-34	35-39	40-44	45-49
Two	1,364	3	41	72	77	42	58	94
One	711	7	18	35	32	38	38	50
Three	655	5	32	78	69	76	68	105
Four	579	5	29	51	99	117	77	73
Five	329	2	8	21	48	77	50	51
Six	115	2	3	11	23	26	22	12
Seven	33	0	1	1	2	14	1	3
Eight	24	1	1	1	1	6	5	0
Nine	6	0	1	0	0	5	0	0
Ten Or More	4	0	0	0	1	0	2	1

How to Interpret the Sample Report Output:

- For respondents age 25-29 years old, 72 are a two-member household.

Dollar Share Report

Description

The percentage of dollars reported for the product that is held by each institution.

Note: Column percentages total 100%.

Purpose

Displays a list of institutions' "piece of the pie" for dollars of a specific product.

Sample Report Output

Dollar Share Report				
Service Types: Checking/Savings				
Measure: Column %				
Totals	Total	19Q2	19Q3	19Q4
Total in Sample	11,460	3,820	3,820	3,820
Total in Sample (Weighted)	11,458	3,820	3,819	3,819
Total with Service	10,392	3,479	3,448	3,465
Total Service Relationships	29,571	9,978	9,732	9,861
Total Service Relationships (Weighted)	32,028	10,524	10,834	10,670
Avg Dollars per Household	31,837	38,855	27,079	29,577
Institution Name	Total	19Q2	19Q3	19Q4
Institution A	7.4%	7.4%	6.7%	8.2%
Institution B	6.9%	7.6%	6.3%	6.5%
Institution C	6.4%	5.9%	5.8%	7.8%
Institution D	5.8%	5.7%	4.5%	7.1%
Institution E	4.6%	8.3%	1.6%	3.2%
Institution F	4.0%	3.1%	6.7%	2.5%
Institution G	3.9%	3.8%	6.9%	1.1%
Institution H	3.6%	3.6%	3.8%	3.2%

How to Interpret the Sample Report Output:

- In Q4 2019, 3,465 households reported having a checking/savings account; these households had a total of 9,861 checking/savings accounts.
- Of the 9,861 accounts mentioned previously, 6.5% of the dollars reported in these accounts were held at Institution B.

General Penetration Report

Description

The percentage of households with any product at an institution.

Purpose

Overviews any banking relationship that a household has at an institution.

Sample Report Output

General Penetration Report				
Measure: Column %				
Totals	Total	19Q2	19Q3	19Q4
Total in Sample	11,460	3,820	3,820	3,820
Total in Sample (Weighted)	11,458	3,820	3,819	3,819
Institution Name	Total	19Q2	19Q3	19Q4
Institution A	9.4%	9.9%	9.1%	9.3%
Institution B	8.5%	8.5%	8.1%	8.9%
Institution C	8.2%	7.9%	8.4%	8.5%
Institution D	7.5%	7.5%	7.1%	7.9%
Institution E	7.2%	7.9%	6.3%	7.5%
Institution F	6.8%	6.6%	7.3%	6.5%
Institution G	6.8%	7.3%	6.8%	6.2%
Institution H	6.6%	6.1%	6.3%	7.3%

How to Interpret the Sample Report Output:

- In Q4 2019, 7.9% of respondents had at least one relationship with Institution D.

Additional Information:

- Columns may total more than 100% as households may have multiple financial institutions and/or accounts.
- Does not focus on the type of relationship or a specific product that a household may have.
- Please refer to the template descriptions of Primary Penetration and Household Penetration in this document for further information.

Household Demographic Profile Report

Description

Percentage of households contained in a range of demographic variables.

Purpose

Identifies the demographic traits of a market.

Sample Report Output

Household Demographic Profile Report		
Measure: Column %		
Totals	Total	19Q2
Total in Sample	3,820	3,820
Total in Sample (Weighted)	3,820	3,820
Variables	Total	19Q2
Age Household Head:		
Under 35	20.4%	20.4%
35 to 44	18.9%	18.9%
45 to 54	18.9%	18.9%
55 to 64	18.4%	18.4%
65 or Older	23.5%	23.5%
Mean/Median Age:		
Mean Age	51	51
Median Age	52	52
Household Size:		
One Member Household	18.6%	18.6%
Two Member Household	35.7%	35.7%
Three Member Household	17.2%	17.2%
Four Member Household	15.2%	15.2%
Five or More Members	13.4%	13.4%

How to Interpret the Sample Report Output:

- In Q2 2019, 20.4% of respondents were under 35 years old.
- In Q2 2019, 18.6% of respondents were in a one member household.

Household Financial Product Usage Report

Description

Percentage of households that use each product or service.

Purpose

General overview of household product penetration in the market.

Sample Report Output

Household Financial Product Usage Report				
Measure: Column %				
Totals	Total	19Q2	19Q3	19Q4
Total in Sample	11,460	3,820	3,820	3,820
Total in Sample (Weighted)	11,458	3,820	3,819	3,819
Variables	Total	19Q2	19Q3	19Q4
Major Service Groups:				
Any Deposit Service	92.4%	91.9%	92.5%	92.7%
Any Credit Service	90.4%	90.3%	90.5%	90.5%
Non-Mortgage Credit Service	89.8%	89.4%	89.9%	89.9%
Deposit Services:				
Checking/Savings	92.2%	91.7%	92.4%	92.5%
DDA/Transaction Services:				
All DDA/Transaction Services	89.2%	88.5%	89.4%	89.7%
Savings Services:				
All Savings Accounts	75.8%	75.5%	76.7%	75.3%
Regular Savings Accounts	72.3%	72.0%	73.6%	71.4%
CDs (Time Deposit Accounts)	18.2%	18.1%	16.9%	19.5%
Retirement Services:				
IRAs in All Forms	28.3%	28.2%	28.4%	28.3%
Other Type IRA	20.3%	19.3%	21.3%	20.1%

How to Interpret the Sample Report Output:

- In Q4 2019, 3,820 households were interviewed in this market.
- Of these households, 89.7% had a DDA/Transaction service.

Household Penetration

Description

The percentage of households with a specific product at an institution.

Purpose

Details depth of a specific product's penetration at each institution.

Sample Report Output

Household Penetration				
Service Type: Checking/Savings				
Measure: Column %				
Totals				
	Total	19Q2	19Q3	19Q4
Total in Sample	11,460	3,820	3,820	3,820
Total in Sample (Weighted)	11,458	3,820	3,819	3,819
Institution Name				
	Total	19Q2	19Q3	19Q4
Institution A	9.0%	8.8%	9.5%	8.5%
Institution B	7.1%	7.3%	6.5%	7.5%
Institution C	5.9%	6.0%	5.5%	6.4%
Institution D	5.9%	6.5%	5.3%	5.9%
Institution E	5.7%	5.9%	5.9%	5.4%
Institution F	5.6%	5.7%	5.7%	5.5%
Institution G	3.6%	3.6%	3.5%	3.7%
Institution H	3.5%	3.0%	3.6%	4.0%

How to Interpret the Sample Report Output:

- In Q4 2019, 7.5% of households surveyed report having a checking/savings account at Institution B.

New Account Share

Description

The percentage of accounts opened in the past year for the product being analyzed that is held by each institution. Column percentages total 100%.

Purpose

Displays a list of institutions' "piece of the pie" for account acquisition in the past year for a specific product. Shows the success of other institutions' account acquisition strategies.

Sample Report Output

New Account Share Report				
Service Type: CDs (Time Deposit Accounts)				
Measure: Column %				
Totals	Total	19Q2	19Q3	19Q4
Total in Sample	11,460	3,820	3,820	3,820
Total in Sample (Weighted)	11,458	3,820	3,819	3,819
Total with Service	546	196	150	200
Total Service Relationships	963	357	261	345
Total Service Relationships (Weighted)	1,126	392	350	384
Avg Dollars per Household	2,826	3,201	2,384	2,894
Institution Name	Total	19Q2	19Q3	19Q4
Institution A	0.9%	0.5%	0.9%	1.2%
Institution B	0.8%	0.6%	0.4%	1.4%
Institution C	0.5%	0.6%	0.5%	0.3%
Institution D	0.5%	0.3%	0.8%	0.3%
Institution E	0.4%	0.5%	0.5%	0.1%
Institution F	0.3%	0.3%	0.2%	0.5%
Institution G	0.3%	0.3%	0.2%	0.2%
Institution H	0.3%	0.4%	0.0%	0.6%

How to Interpret the Sample Report Output:

- In Q4 2019, 200 respondents reported opening a CD account in the past quarter. These households had a total of 345 CD accounts opened in the past quarter.
- Of the 345 CD accounts mentioned, 1.4% were held at Institution B.

Primary Penetration Report

Description

The percentage of households calling a particular institution their “primary” institution. Households can report only one primary institution, thus the column percentages total 100%.

Purpose

Focuses on a type of relationship in which respondents indicate one institution as their regular or main financial institution.

Sample Report Output

Primary Penetration Report				
Measure: Column %				
Totals	Total	19Q2	19Q3	19Q4
Total in Sample	11,460	3,820	3,820	3,820
Total in Sample (Weighted)	11,458	3,820	3,819	3,819
Primary Institution Name	Total	19Q2	19Q3	19Q4
Institution A	7.0%	7.1%	7.3%	6.5%
Institution B	5.9%	6.1%	5.2%	6.5%
Institution C	4.9%	4.6%	4.8%	5.2%
Institution D	4.7%	5.2%	4.4%	4.6%
Institution E	4.2%	4.3%	4.6%	3.7%
Institution F	4.0%	3.9%	4.2%	3.9%
Institution G	3.0%	2.9%	2.8%	3.2%
Institution H	2.1%	1.8%	2.3%	2.3%

How to Interpret the Sample Report Output:

- In Q4 2019, 5.2% of respondents considered Institution C to be their primary institution.

REPORT PROMPTS OVERVIEW

The following section provides a detailed overview of the report prompts available in the Claritab report builder.

Select Report

The following prompts determine which report will be created.

REPORT TYPE PROMPTS	
PROMPT NAME	ADDITIONAL INFORMATION
Survey Area	The default option is the National Sample.
Template	The Template prompt is where you select the actual report you want to run.

Report Inputs

The following prompts set the specific details for what information will be included in the report output.

Note: The template selected will determine which of the below prompts will appear in the report creation process.

REPORT INPUT PROMPTS	
PROMPT NAME	ADDITIONAL INFORMATION
Geography	Allows the user to filter report results by a defined geography. The default option is All Counties.
Service Types	These are the various services and/or products offered by a financial institution. It allows the user to filter a report based on a specific financial service or group of services.
Row Category	This selection drives the row category found in the report output.
Column Variable	This variable will dictate the column variables in the report output. It will take the row category variable, and further break out those respondents by the selected column variable.
Household Filter	Allows the user to filter the report results by a specified custom variable (demographics, customer relationship, geography, etc) The default currently is All Respondents.

Report Layout

These prompts determine the layout for the report output.

Note: The template selected will determine which of the below prompts will appear in the report creation process.

REPORT LAYOUT PROMPTS	
PROMPT NAME	ADDITIONAL INFORMATION
Rank on Column	From the Column Variable selection, users can set the specific variable that the report output will be sorted on.
Weighting	Weighting makes the respondent data as representative of the composite geography as possible. See below for a detailed explanation.
Measure	Set the measure that will be displayed in the report output. The options are: Frequency: Number of respondent records that fulfill the report definitions Column Percent: Percent penetration Index: Index
Layout	The template selected will determine which of the following layout options will appear: All Columns: Allows all column measures/variables to be displayed in the report output. Mergers: Allows the user to combine respondent data to speculate results for multiple institutions or holding companies. Top Institutions: Allows the user to prioritize one or many financial institutions to consistently appear in report results. HC Institutions: Allows the user to aggregate financial institution data up to the parent Holding Company level.
Number of Institutions	Set the number of institutions (rows) you'd like included in the report output.

Weighting

Claritas survey data utilizes a county household population based weighting scheme. Claritas' annual household population projections are used as the basis for these weights, ensuring that sample is representative of the household population in the geography being analyzed. Weighting can be applied in the tool by selecting a Weighted check box in the Layout section of the Report Definition tab.

In addition to using county household population, Claritas also incorporates the time period of the survey into the weighting scheme. Weights are assigned by county using the distribution of sample in each quarter of interviewing. This ensures the sample collected is representative of the household population for each quarter in the data set. Though there are multiple sets of weights used in the data depending on the survey quarter, there is only one weight assigned to each household.

To accomplish weighting, the survey interviews per 1,000 households, or int/1,000 HHs, is calculated for each county in the marketplace as well as the total market. This value acts as a metric to compare sample depth relative to the household population between each county and

the composite marketplace. In counties where the depth of sampling under-represents the total int/1,000 HHs, responses are weighted up. Likewise, sample in over-represented counties are weighted down. Interviews in under-represented counties are assigned weights above 1.00, while the weights for interviews in over-represented counties can range from 0.01 to .99.

Weighting is also dependent on the geography being analyzed. When the user selects All Counties as the geography, weighting reflects the entire geography contained in the deliverable. However, when a geographic filter is applied, weights are recalculated to be representative of the defined geography.

Unlike geographic filters, household filters do not impact the weighting scheme in any way.

Example

Consider a three county geography with the following quarterly sample and household population:

WEIGHTING EXAMPLE				
	COUNTY A	COUNTY B	COUNTY C	TOTAL
Sample	50	200	250	500
Household Population	100,000	150,000	250,000	500,000
Int/1,000 HHs	.50	1.33	1.00	1.00
Weight	2.00	.75	1.00	--

For this example, in the total geography, one interview per 1,000 households is conducted. County C also has this depth of interviewing, so a weight of 1.00 is applied. County A has a lower depth of interviewing than the total and responses are weighted up. County B has a higher depth of interviewing than the total and responses are weighted down.

In conclusion, weighting makes the respondent data as representative of the composite geography as possible. In this tool, weighting refers to the population based weights only, no demographic or age by income weights are applied to the survey respondent level data.

CUSTOM REPORT PROMPT SELECTIONS

This section provides a general summary of the custom report selection capabilities currently available in Claritab reports.

Note: Available prompt and custom capabilities vary by report template.

Geography

Description

This prompt should be used to filter the entire report for the selected geographic area. If multiple geographies are selected, the geographies will be aggregated into a single area.

Note: The Claritas Financial Track survey is collected at the county level, and only state and county level geographies are available as a standard selection.

The default selection for this prompt is 'All Counties,' which represents the entire geographic scope of the survey area.

To filter the report for detail-level geographies:

1. Remove 'All Counties' from the prompt by clicking the 'x'.
2. Select the desired detail-level geographies from the dropdown.

Note: Clicking '+' will allow you expand folders of geographies. Geographies can be selected at the parent and component level.

3. (Optional) To save the selected geographies for future use, click the Save button.

Saved geographies will be available in the Saved Geographies folder within the Geography prompt.

Purpose

This prompt filters the entire report for the selected geographic area. If a geography is selected, the report represents respondents for that area.

Sample Report Selection

The screenshot shows a 'Geography' selection interface. At the top, the word 'Geography' is written in orange. Below it, there is a dropdown menu with three selected items: 'New Mexico x', 'Bexar TX x', and 'Blanco TX x'. To the right of the dropdown is a blue 'Save' button. Below the dropdown, a list of Texas counties is displayed: Bastrop TX, Baylor TX, Bee TX, Bell TX, Bexar TX, Blanco TX (which is highlighted with a blue background), and Borden TX. The interface has a light gray background and a white border.

In this example, the default selection of 'All Counties' has been removed, and the state of New Mexico has been selected along with Bexar and Blanco counties in Texas. This filter will limit the report results to survey respondents found within these geographic areas.

Column Variable

This prompt is used to select a descriptive variable for analysis against the selected row variable.

There are two Column Variable prompt options:

COLUMN VARIABLE PROMPT OPTIONS	
PROMPT NAME	ADDITIONAL INFORMATION
Select a Column Variable	Allows users to choose a descriptive variable for analysis against the selected row variable.
Create and Select a Column Variable	Allows users to create custom definitions for the column variable. This custom variable will then be used for analysis against the selected row variable. This option enables greater granularity when selecting specific descriptive variables.

Note: The default selection for this prompt is 'Time Period,' which reports each quarter collected in the survey as individual columns.

Select a Column Variable

To select a different column variable:

1. Click the the Select a Variable option.
2. Open the Column Variable dropdown menu.
3. Select your desired column variable.

Note: If a parent family of descriptive variables is selected (i.e. Age, Primary Race, Education), the report will contain all columns of data for the variable selected.

Create and Select a Column Variable

To create a custom variable:

1. Click the Create and Select a Variable option.
2. Expand the desired Parent Family of Descriptive Variables, located in the far-left column.
3. Select the desired variable. The available variable breaks will appear in the middle column.
4. Select the desired variable breaks to be included in the custom variable. Selections appear in the far-right column.
5. Click the Save Column Selections button to name and save the custom variable for future use.
6. (Optional) Repeat steps 2-5 to include additional custom variable columns in your report output.

Note: If individual items are selected via the 'Create and Select a Column Variable' option, there will be as many columns as there are variables selected.

To create a summed custom variable:

1. Click the Create and Select a Variable option.
2. Expand the desired Parent Family of Descriptive Variables, located in the far-left column.
3. Click the Create Summed Column button.
4. In the Create Summed Column Window:
 - a. Enter a name for the custom variable.
 - b. Select the desired variable breaks that you want included in the summed custom variable.
 - c. Click Save.
5. The summed variable appears in the far-right column, and will be saved for future use.

Note: The summed variable will be visible and usable for all licensed users within your organization.

6. (Optional) Repeat steps 2-5 to include additional summed custom variable columns in your report output.

Note: When individual items are selected via the Create Summed Column option, there will be one column that contains the sum of all selected variables.

Purpose

This prompt is used to select a descriptive variable to compare against the row variable.

Sample Report Selection

Column Variable

Select a Column Variable
 Create and Select a Column Variable

Q Search	Q Search	3 Selected	Clear All
<ul style="list-style-type: none"> > Saved Column Selections > Demographics <ul style="list-style-type: none"> ▼ General Customer <li style="background-color: #f2f2f2; padding: 2px;">Institution Name Institution Type 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Mortgage Co <input checked="" type="checkbox"/> Finance Co <input checked="" type="checkbox"/> Insurance Co <input type="checkbox"/> Auto Mfr Cdt Co <input type="checkbox"/> Commercial Bank <p style="text-align: center; margin-top: 5px;">Create Summed Column</p>	<ul style="list-style-type: none"> Mortgage Co Finance Co Insurance Co 	<ul style="list-style-type: none"> × × ×
Column Type='Institution Type' AND Column Codes IN ('Mortgage Co','Finance Co','Insurance Co')		×	

[Save Column Selections](#)

In this example, the 'Create and Select a Column Variable' prompt has been selected and the user has accessed 'Institution Type' under 'General Customer' variables. The 'Mortgage Co' 'Finance Co' and 'Insurance Co' variables have been selected. The report will be filtered for respondents who have at least one general (vs. primary) banking relationship with either of these three institution types.

VIEW REPORT OUTPUT

Once your report generates it will be displayed on the screen. Once it's displayed, you will have the following options:

REPORT OUTPUT OPTIONS	
REPORT OUTPUT OPTIONS	ADDITIONAL INFORMATION
Modify Selections	To update the data in your report, click Modify Selections. A screen appears with your initial prompt selections. Edit the information as needed and regenerate the report. Note: If you decide not to update any of the prompts, clicking View Report will bring you back to the report output screen.
Export to CSV / Export to Excel	Exports your report output to .CSV or Microsoft Excel [®] .
Export Report Selections	Allows you to export the report selections as an RPT file. so that the same sections can then be imported and used in a future report.
Import Report Selections	Import a previously exported report selections RPT file, and create a report using previously saved report selections.

The screenshot shows the Claritas report output interface. At the top, there are navigation buttons: "Modify Selections", "Export to CSV", "Export to Excel", "Export Report Selections", and "Import Report Selections". Below these is a "Hide Selections" button. The main content area displays report parameters and a data table.

Report Parameters:

- Survey Area: National Sample
- Report: Account Share
- Geography: All Counties
- Service Types: Any Deposit Service
- Row Category: Institution Name
- Layout: Top Institutions (1)
- Column Variables: Time Period
- Household Filter: All Respondents
- Rank on Column: Total
- Weighting: Unweighted
- Measure: Frequency
- Number of Institutions: 20

Totals Table:

Totals --	Total --	19Q2 --	19Q3 --	19Q4 --
Total in Sample	11460	3820	3820	3820
Total with Service	10417	3490	3453	3474
Total Service Relationships	33056	11313	10702	11041
Avg Dollars per Household	41992	50665	35707	39605

Institution Name Table:

Institution Name	Total	19Q2	19Q3	19Q4
JP Morgan Chase Bank, NA (Brch) TX	2060	713	604	743
Bank of America NA TX	1677	549	435	693
Wells Fargo Bank NA (Brch) TX	1499	511	396	592
Bank of America NA CA	1320	470	413	437
Wells Fargo Bank (Brch) CA	1316	509	428	379
JP Morgan Chase Bank, NA (Brch) CA	1170	416	382	372
JP Morgan Chase Bank, NA (Brch) AZ	904	334	297	273
USAA Federal Savings Bank TX	863	240	291	332
Wells Fargo Bank AZ	753	286	256	211
Navy FCU VA	733	242	247	244

At the bottom of the table, there is a pagination control showing "10" and "2" with navigation arrows.

TECHNICAL SUPPORT

If you need further assistance, please contact the Claritas Solution Center between 9:00 a.m. and 8:00 p.m. (Monday through Friday, EST) at 800.866.6511.

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