

# Actual vs Potential Consumption Report

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## OVERVIEW

This document will take you through the process of creating an Actual vs Potential Consumption report. This report uses customer consumption to help you identify the level of potential for detail level analysis areas in your market area.

The Actual vs Potential consumption report requires both:

- An imported file to capture your actual customer consumption by geography
- A standard or custom consumption profile to capture your expected customer consumption

The report output is based on the concept that you can plot the ratio of each analysis area's actual consumption index and market demand index on a grid whose four quadrants each represent one of the following market strategies:

- Invest – Indicates that you should invest for growth. If your actual consumption penetration is less than or equal to the average and the potential is greater than or equal to the average, your actual performance is below opportunity.
- Dominate – Indicates that you should continue to dominate and protect these areas. If your actual and potential consumption penetration are greater than or equal to the average penetration, your penetration is high and so is the opportunity.
- Maintain – Indicates that you should maintain your investment but not expect further growth. If your actual consumption penetration is more than the average and the potential is less than average, your actual performance is exceeding the expected opportunity based on the area's demographic composition.
- Innovate – Indicates that you should minimize your efforts or consider marketing a different product. If your actual and potential consumption penetration are both less than average, this indicates that the opportunity is low.

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## LOCATE THE REPORT

1. From the homepage, click on Reports.



2. Select Segmentation Reports → Locator Reports → Actual Vs Potential Consumption.

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## SELECT REPORT INPUTS

### Select Segmentation System and a Base

1. Select a segmentation system.

A screenshot of a web form titled "Select a Segmentation System". It features a dropdown menu with three visible options: "PRIZM Premier", "PSYCLE Premier", and "ConneXions".

2. Select the base you'd like to use.

Note: If you license ZIP+6 level distributions, it is generally recommended to select Households (ZIP+6 Based) as your base, as this level provides a greater level of granularity for the segment distributions than the ZIP+4 level.

A screenshot of a web form titled "Select a Base". It contains three radio button options: "Households (ZIP+4 Based)" (which is selected), "Five Year Households (ZIP+4 Based)", and "Households (ZIP+6 Based)".

## Select Consumption Profile and Actual Customer Consumption Variable

1. Select a profile from:

- My Profiles – contains your custom profiles
- Claritas Profiles – contains the syndicated profiles you license

Note: The expected behavior measured in the selected consumption profile must be comparable to the behavior captured in your customer consumption variable.



2. Select the customer consumption variable.

Note: Consumption variables are located in the My Data folder in a subfolder with the original file name, and will include 'Consumption' in the variable name.

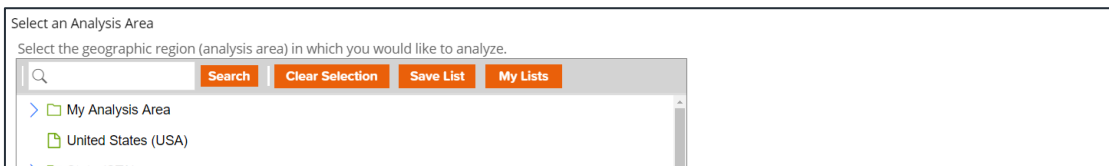


## Select Analysis Area and Level of Detail

1. Select the analysis area(s) you want included in your report.

Note: Clicking on the folder (without opening it) will select all areas contained within the folder.

Note: The selected analysis area must cover the same extent as the previously selected consumption variable.



2. Select the level of detail. The options are:

LEVEL OF DETAIL	
LEVEL OF DETAIL	DEFINITION
As Selected	Creates individual columns for each analysis area in the selected order.
Component	Creates individual columns for all the analysis area components you selected (State, County, ZIP Code, etc.)

Note: The selected geography level must be either the same level contained in your actual customer consumption file or a geography level that is larger than what is contained in your file (so that the customer consumption can be rolled up to the selected level).

3. To include parent geographies in the report, set Include Parent Geographies to ON. When the Parent Geography pop-up window appears, click the Name and/or Code check box next to the parent geography(ies) that you want appended to the report.

Include Parent Geographies  ON

Parent Geography Level	Name	Code
Analysis Area	<input type="checkbox"/>	<input type="checkbox"/>
United States (USA)	<input type="checkbox"/>	<input type="checkbox"/>
State (STA)	<input type="checkbox"/>	<input type="checkbox"/>
Combined Statistical Area (CSA)	<input type="checkbox"/>	<input type="checkbox"/>

### Add Additional Options

- (Optional) You can specify to calculate the market demand index and actual consumption index to the analysis area.
  - If you leave this prompt OFF, the indexes will be calculated based on the total U.S. Choose this option if:
    - You want to analyze how the areas compare to the U.S. average.
    - You want to have a consistent base when running data for other geographies in the future.
  - If this prompt is changed to ON, the indexes will be calculated based on the extent of the selected analysis area(s). Choose this option if:
    - You want to analyze or rank how the analysis areas compare to each other.
    - You want your focus to be regional.

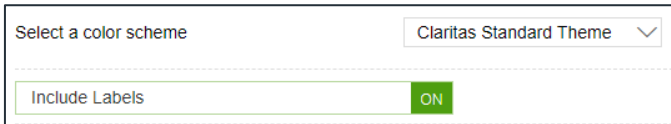
Analysis Area Index  OFF

2. To include a map in your report output, set Include Map to ON.



A screenshot of a form element with a label 'Include Map' and a green toggle switch set to 'ON'.

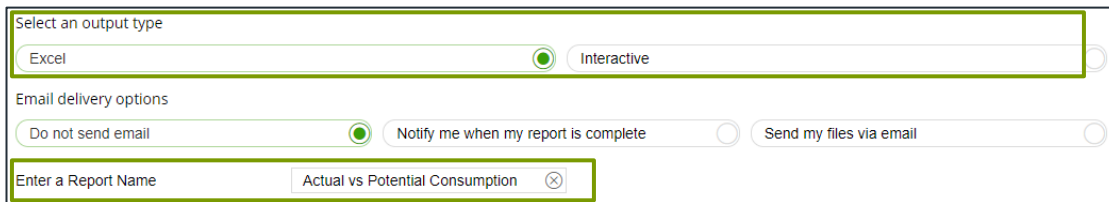
3. Specify if you want to include labels and select a color scheme for your map.



A screenshot of a form element showing a dropdown menu for 'Select a color scheme' with 'Claritas Standard Theme' selected, and an 'Include Labels' toggle switch set to 'ON'.

### Specify Report Output Details

1. Specify your report output type and enter the report name. Click Submit.



A screenshot of a form for specifying report output details. It includes a 'Select an output type' section with radio buttons for 'Excel' and 'Interactive' (selected). Below is an 'Email delivery options' section with radio buttons for 'Do not send email' (selected), 'Notify me when my report is complete', and 'Send my files via email'. At the bottom is an 'Enter a Report Name' field with the text 'Actual vs Potential Consumption' and a clear button.

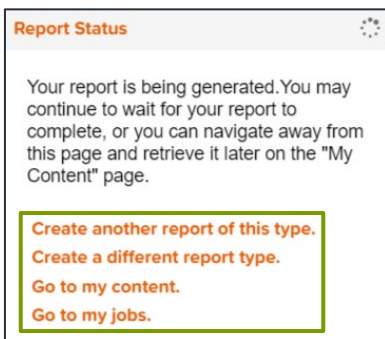
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## REVIEW REPORT OUTPUT

### If Creating Excel Output

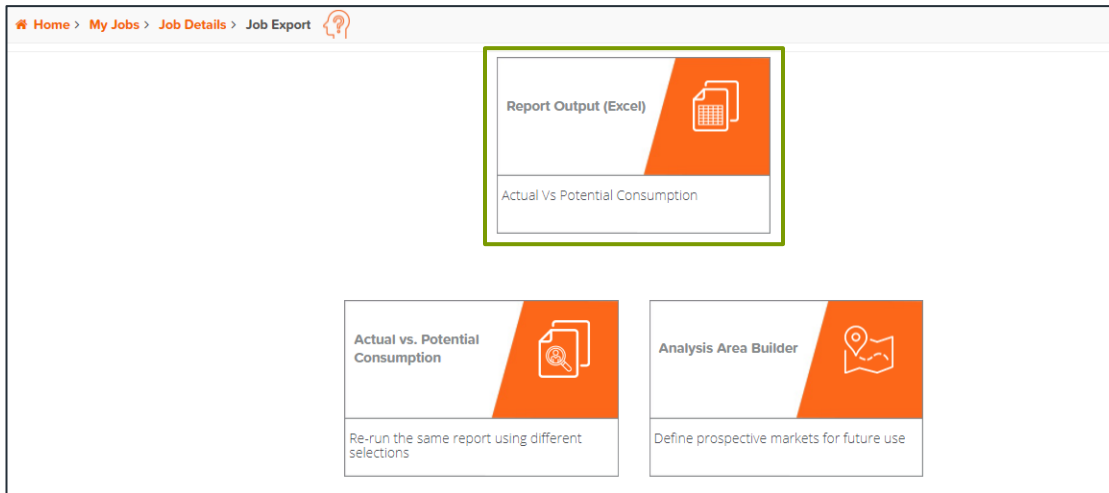
1. While the report generates, you can either wait for the report to complete or you are given the option to navigate away from the current page.

Note: If you move on to another task, your report output can be retrieved from My Jobs.



A screenshot of a 'Report Status' dialog box. The text inside reads: 'Your report is being generated. You may continue to wait for your report to complete, or you can navigate away from this page and retrieve it later on the "My Content" page.' Below the text are four links: 'Create another report of this type.', 'Create a different report type.', 'Go to my content.', and 'Go to my jobs.' The links are highlighted with a green border.

2. After the report generates, click Report Output to view your report.



## If Creating Interactive Output

1. Once your report generates it will be displayed on the screen.

View Map	Parent Geography	Sort/Subtotal	Display & Edit Report Prompts	Save Report Output	Export Report	Create Analysis Area	Create Report	Filter	Buy Children's Shoes- 6mo (H) - Sales Consumption			
Strategy	Analysis Area Code	Analysis Area Name	Base Count	Base % Comp	% Potential	Total Consu...	% Share	Actual Cons...	Total Demand	% Share	Market Dem...	
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