



# Actual vs Potential Report

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## OVERVIEW

This document will take you through the process of creating an Actual vs Potential report. This report helps you identify the level of potential for detail level analysis areas in your market area.

The Actual vs Potential report requires both:

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

The report output is based on the concept that you can plot the ratio of each analysis area's actual index and market potential 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 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 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. Your actual 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 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.

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## SELECT REPORT INPUTS

### Select Segmentation System and a Base

1. Select a segmentation system.

A screenshot of the 'Select a Segmentation System' dropdown menu. The menu is open, showing three options: 'PRIZM Premier', 'P\$YCLE Premier', and 'ConneXions'. The 'PRIZM Premier' option is currently selected and highlighted.

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.

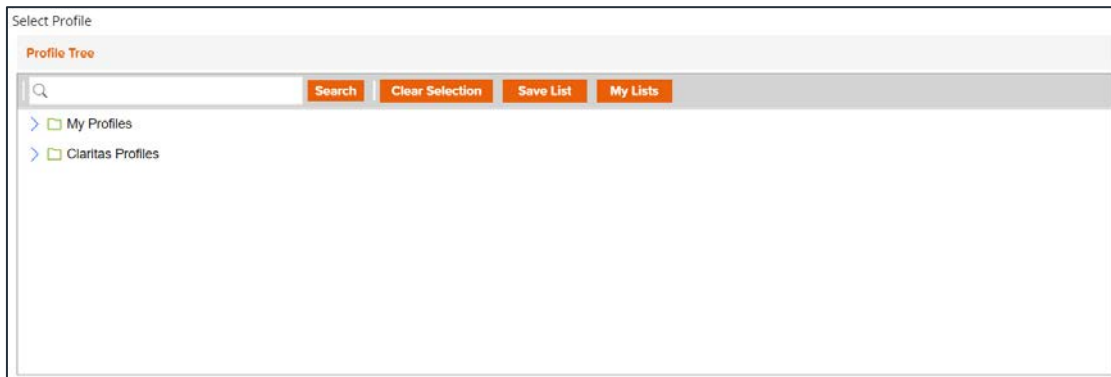
A screenshot of the 'Select a Base' section. It contains three radio buttons: 'Households (ZIP+4 Based)' (which is selected and has a green dot), 'Five Year Households (ZIP+4 Based)', and 'Households (ZIP+6 Based)'. The 'Households (ZIP+6 Based)' option is the recommended choice according to the note.

## Select Profile and Actual Customer Count Variable

1. Select a profile from:

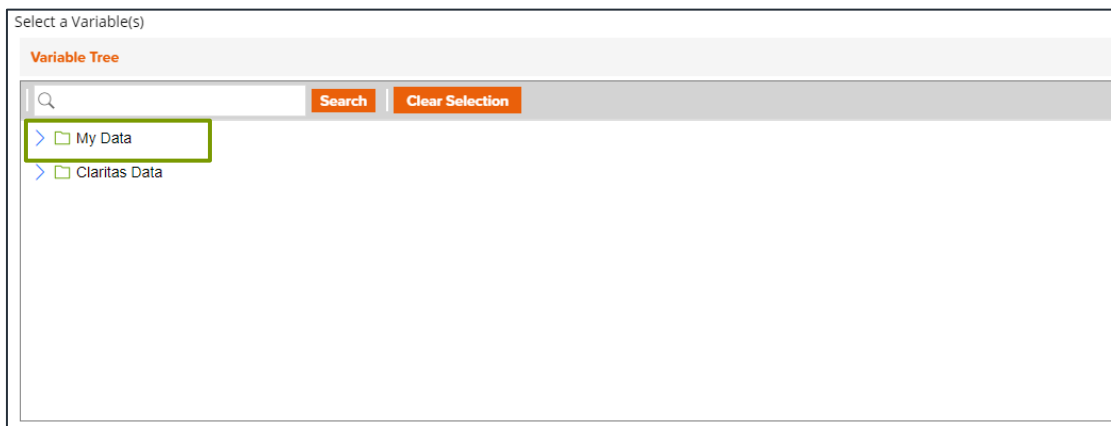
- My Profiles – contains your custom profiles
- Claritas Profiles – contains the syndicated profiles you license

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



2. Select the variable that captures the actual customer count by geography (also known as a geosummary).

Note: This variable will come from a previously imported file, and will be located in the My Data folder.

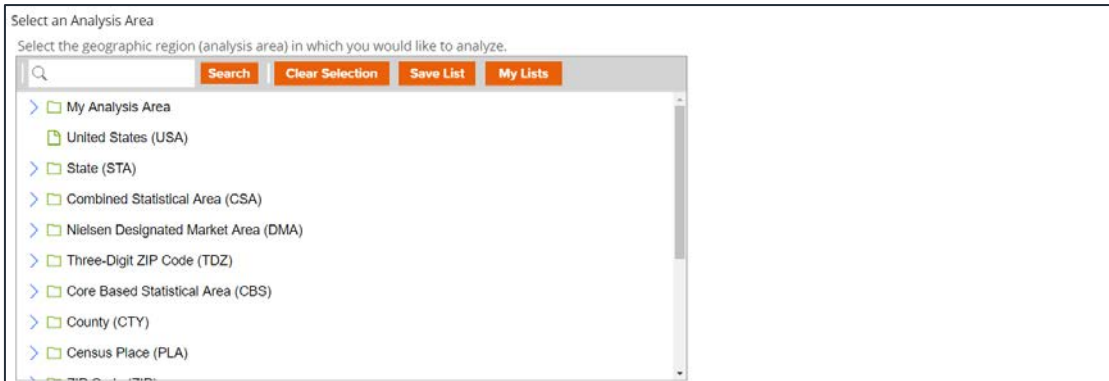


## Select Analysis Area and Level of Detail

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: Be sure the area you select captures the geographies included in your selected actual customer count variable.



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

Note: Be sure the geography level you choose to report at is either the geography level contained in your actual customer count file or a geography level that is larger than what is contained in your file (so that the customer counts can be rolled up to the selected level).

| 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.) |

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.



## Add Additional Options

- (Optional) You can specify to calculate the market potential index to the analysis area.
  - If you leave this prompt OFF, the index 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.
  - If this prompt is changed to ON, the index 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.

Analysis Area Index

OFF

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

Include Map

ON

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

Include Labels

ON

Select a color scheme

Claritas Standard Theme

▼

## Specify Report Output Details

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

Select an output type

Excel

☒

Interactive

☐

Email delivery options

Do not send email

☒

Notify me when my report is complete

☐

Send my files via email

☐

Enter a Report Name

Actual vs. Potential

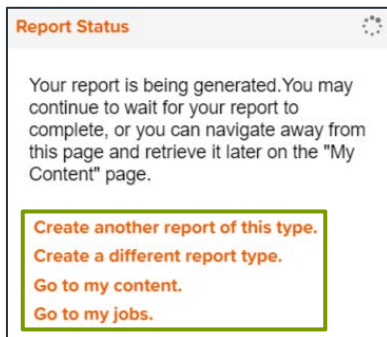
×

## REVIEW REPORT OUTPUT

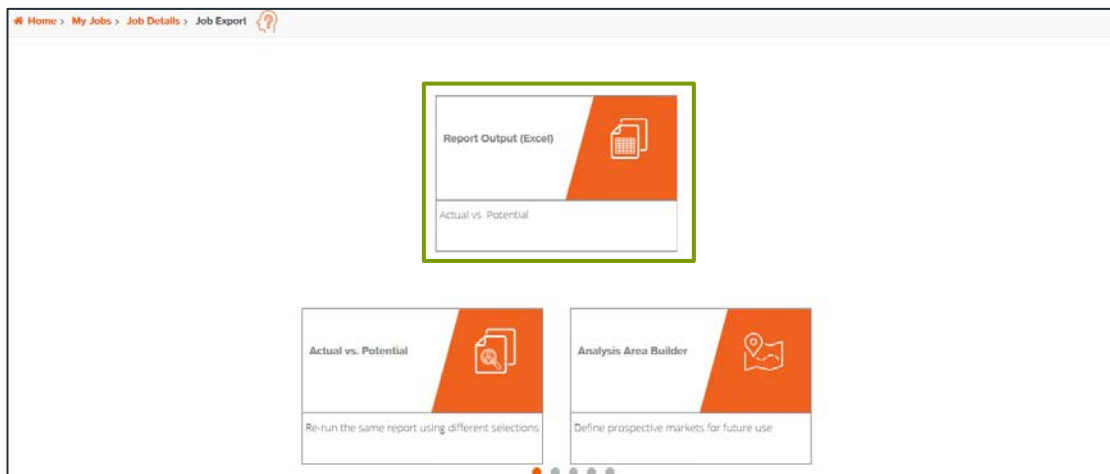
### If Creating Excel Output

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.



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 MapParent GeographySort/SubtotalDisplay & Edit Report PromptsExport ReportCreate Analysis AreaCreate ReportFilter |                    |                    |                                                    |             |       |                |       |             |               |                |  |
|------------------------------------------------------------------------------------------------------------------------|--------------------|--------------------|----------------------------------------------------|-------------|-------|----------------|-------|-------------|---------------|----------------|--|
| Strategy                                                                                                               | Analysis Area Code | Analysis Area Name | Buy Athletic Shoes- 1yr (A) - Bought Running Shoes |             |       |                |       |             |               |                |  |
|                                                                                                                        |                    |                    | Base Count                                         | Base % Comp | Count | Estimated U... | Index | % Potential | Users/100 HHs | Market Pote... |  |
| Device                                                                                                                 | 28546              | Index Head         | 2,724                                              | 0.00%       | 66    | 3,536          | 634   | 4.00%       |               | 404            |  |