

# Market Potential Report

## OVERVIEW

This document will take you through the process of creating a Market Potential report.

The Market Potential report compares current usage patterns for one or more product profiles in an analysis area. It calculates a Market Potential Index to help determine the potential for introducing new products and services, or for developing strategies for cross-selling products and services based on current consumption trends.

## LOCATE THE REPORT

1. From the homepage, click on Reports.



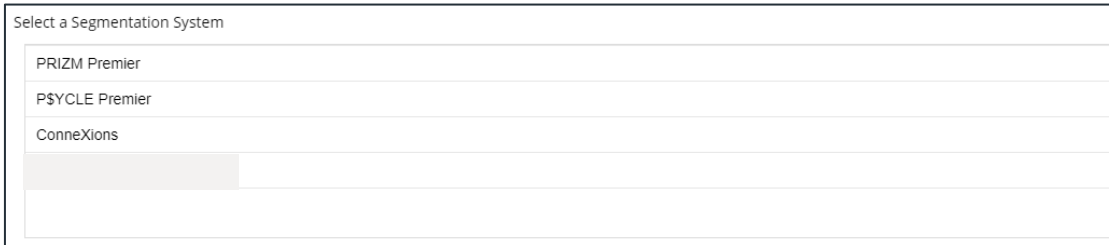
2. Select Segmentation Reports → Lifestyler Reports → Market Potential.

---

## SELECT REPORT INPUTS

### Select Segmentation System and a Base

1. Select a segmentation system.



A screenshot of a dropdown menu titled "Select a Segmentation System". The menu is open, showing three options: "PRIZM Premier", "PSYCLE Premier", and "ConneXions". The "ConneXions" option is currently selected and highlighted in a light gray color.

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.

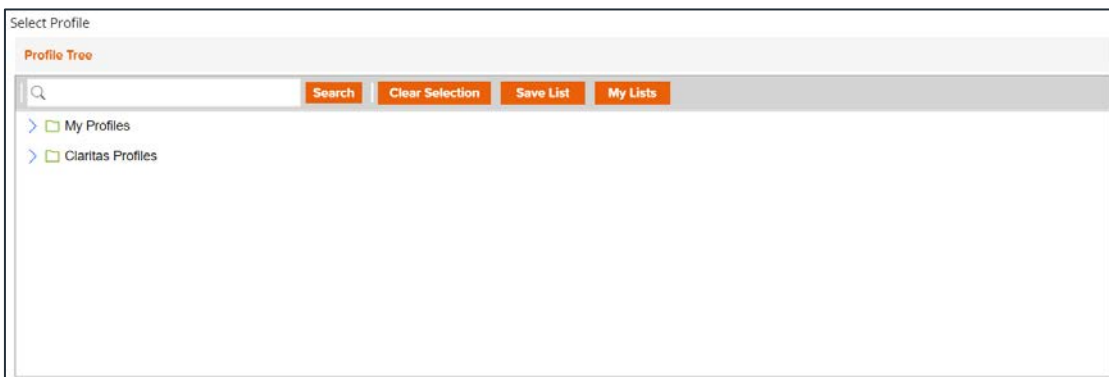


A screenshot of a "Select a Base" section with three radio button options: "Households (ZIP+4 Based)", "Five Year Households (ZIP+4 Based)", and "Households (ZIP+6 Based)". The "Households (ZIP+4 Based)" option is selected, indicated by a green dot in the center of the radio button.

### Select Profiles

1. Select the profile(s) that you want to use in your report.

Note: Up to 30 profiles can be included in the report output.

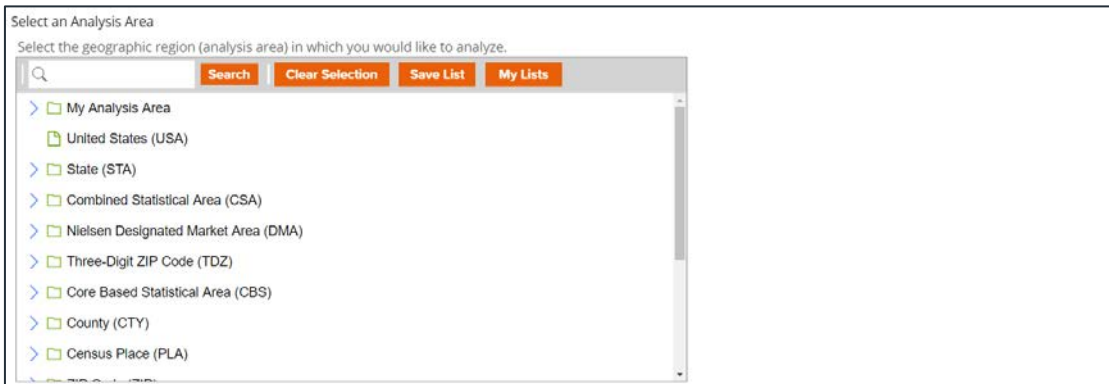


A screenshot of the "Select Profile" interface. At the top, there is a "Profile Tree" section with a search bar and four buttons: "Search", "Clear Selection", "Save List", and "My Lists". Below the search bar, there are two expandable categories: "My Profiles" and "Claritas Profiles", each with a right-pointing chevron icon.

## Select Analysis Area and Level of Detail

1. Select a geography or an analysis area.

Note: Clicking on the folder (without opening it) will select all areas contained within the folder. Up to 10,000 custom analysis areas can be included in the report output. However, there are no limits on standard geographies.



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

LEVELS 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.



4. (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 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 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.

Analysis Area Index	OFF
---------------------	-----

### Select Sort Method

You'll be prompted to make the following selections:

SORT/SUBTOTAL PROMPTS	
SORT/SUBTOTAL PROMPT	ADDITIONAL INFORMATION
Sort method	Sets the method used for sorting your records. The selected sort method will affect which of the remaining sort/subtotal options will appear.
Sort profile	This is the profile that the report will be sorted on.
Sort measure	This is the measure tied to the sort profile that will be used for the basis of sorting.
Sort direction	The options are ascending and descending.
Subtotal method	Sets the method used for grouping the records into subtotals. The selected subtotal method will affect which of the remaining subtotal options will appear.
Number of Ranges	Sets the number of subtotal groups included in your report.
Subtotal measure	Sets the measure that will be used for the basis of subtotalling.

1. Select a sort method. The options are:

SORT METHODS	
SORT METHOD	DEFINITION
None	No sort applied.
Row ID	Sorts data according to row ID.
Row Name	Sorts data according to name in alphabetical order.
Report Selection	Displays additional options that allow you to sort data based on a specific profile measure.

- (Optional) If you selected Report Selection as the sort method, you'll be prompted to select a sort profile and sort measure.

Note: The list of available sort profiles will be dependent on the profiles you selected in the previous Select Profile(s) prompt.

- Select a sort direction:

- (Optional) If you selected Report Selection as the sort method, you'll be prompted to select a subtotal method. The options are:

NOTE: If you want a themed map included in your report output, you must select a sub-total method and change the Include Map prompt to ON.

SUBTOTAL METHODS	
SUBTOTAL METHOD	DEFINITION
None	No subtotal applied.
Equal Ranges	Groups areas (rows) based on the values of a specific variable – Each subtotal group will have an equal minimum/maximum range for the specified variable.
Equal Records	Uses basic division to group the number of areas (rows) equally – Each subtotal group will have an equal number of areas.
n-Tile	Distributes the total number of households in an area into equal groups that are approximately equal, such as fourths or fifths. Dividing data in equal portions ranks the analysis areas by marketing potential, in groups showing the strongest to weakest.
Analysis Area	Groups based on your selected analysis areas.

If you select the Equal Ranges or Equal Records subtotal method, you need to specify the following:

- Number of ranges: select your desired number of groupings

If you select the n-Tile subtotal method, you need to specify the following:

- Number of ranges: select your desired number of groupings
- Subtotal measure: select the desired measure to use for equal grouping

If you select the Analysis Area subtotal method, you need to specify the following:

- Display and calculate data for each duplicate geography. The options are:

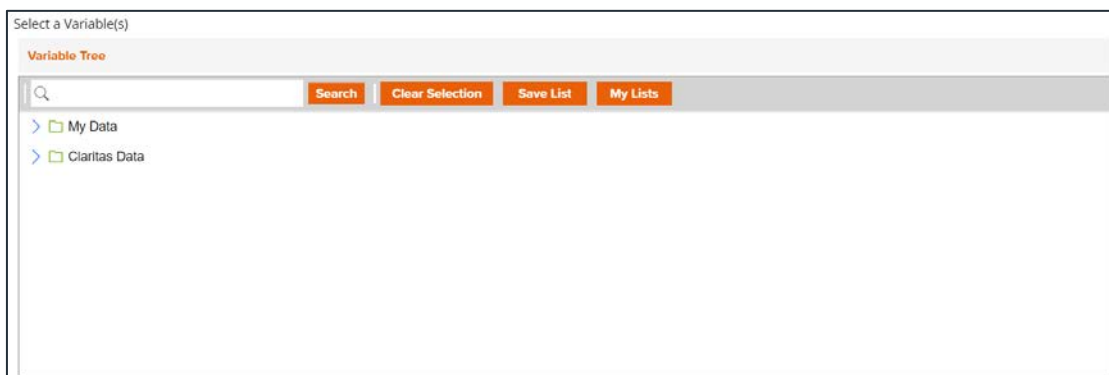
DUPLICATE GEOGRAPHY METHODS	
DUPLICATE GEOGRAPHY METHOD	DEFINITION
Only Once	The report output will not contain any duplicate records (geographies).
In Subtotals Only	The report output will contain any duplicate geographies in the subtotals, but not the total.
In All Totals	The report output will contain duplicate geographies in both the subtotals and total.

### Add Additional Options

1. (Optional) To add additional variables to your report and include a map, set Advanced Options to ON.



2. Select any additional variables you'd like included in your report.

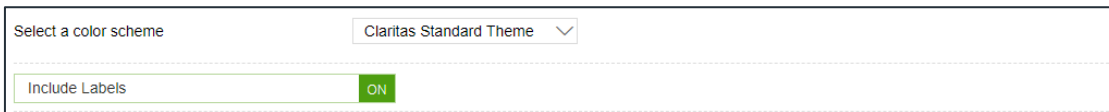


- To include a map in your report output, set Include Map to ON.



A screenshot of a form element with a text input field containing "Include Map" and a green toggle switch labeled "ON" to its right.

- Select a color scheme for your map and specify if you want to include labels.

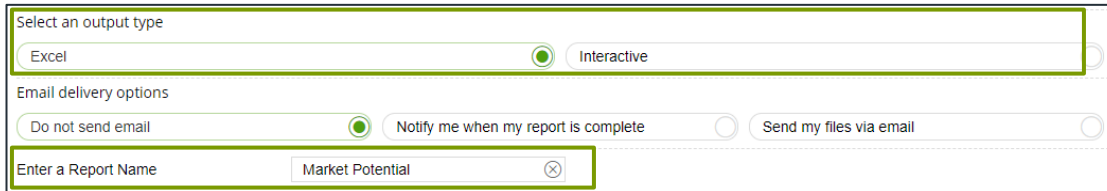


A screenshot of a form element showing a dropdown menu for "Select a color scheme" with "Claritas Standard Theme" selected, and a toggle switch for "Include Labels" set to "ON".

## Specify Report Output Details

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

Note: If you select more than 30 profiles or 10,000 custom analysis areas, you will receive a message and be returned to your report selections so they can be modified.



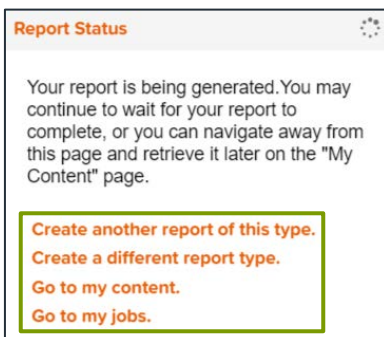
A screenshot of a form with three sections: "Select an output type" with radio buttons for "Excel" (selected) and "Interactive"; "Email delivery options" with radio buttons for "Do not send email" (selected), "Notify me when my report is complete", and "Send my files via email"; and "Enter a Report Name" with a text input field containing "Market Potential".

## REVIEW REPORT OUTPUT

### If Creating Excel Output

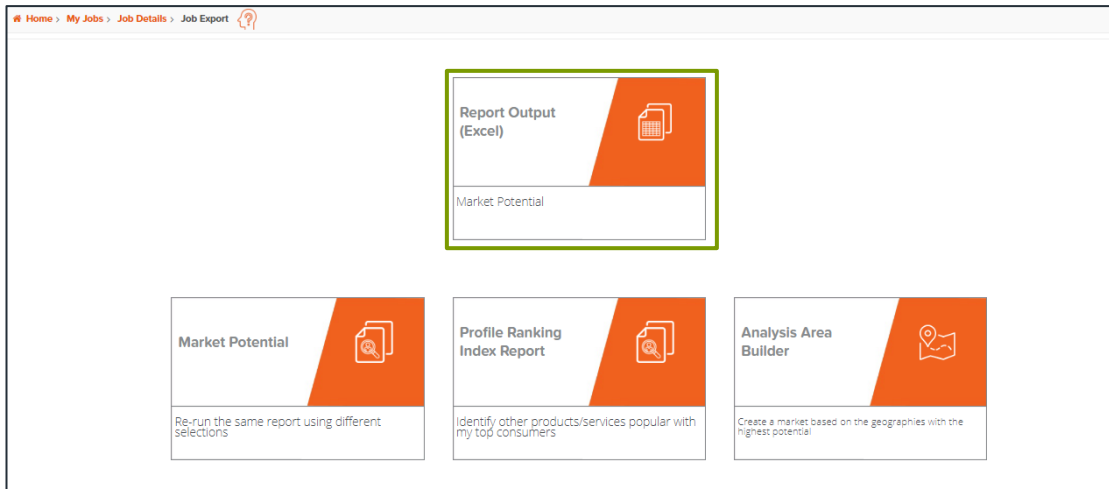
- While the report generates, you can either wait for the report to complete or you are given the option to navigate away from the current page.

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. It contains the text: "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		Export Report		Create Analysis Area	
Analysis Area Code		Analysis Area Name		Buy Athletic Shoes- 1yr (A)							
		Base Count	Base % Comp	Estimated U...	% Comp	Users/100 HHs	Market Pote...				
50700	Market	51	0.00%	00	0.00%	71.07	70				