CLARITAS 360 REPORT OVERVIEW

Commonly Used Reports

This document contains an overview of key reports contained within Claritas 360 including four sections:

- **What is it?**
  - A summary statement defining the report.

- **Business Issues it can solve for:**
  - Lists strategic issues the report addresses.

- **What Questions can it answer/why is it important?**
  - Lists questions and statements that communicate the key insights that each report offers.

- **Sample Report Output:**
  - Defines the report measures included in the output.

- **Report Formulas:**
  - Lists calculations used in the report.

**Click a link below for more information about a particular report.**

- **Consumer Concentration**
  Details about demographics, consumer demand and customer data for any selected analysis area(s).

- **Segment Distribution**
  Shows the geographic distribution of each segment in a selected segmentation system.

- **Profile Worksheet**
  Provides details on usage of a product or service by each segment within the entire country or a selected analysis area.

- **Target Segment Measures**
  Compares profile data on products, services, demographics, media preferences and activities that the selected target and/or its segments purchase or use.

- **Target Concentration**
  Shows the concentration of households for a single target group in both a report and a map.

- **Market Potential**
  Shows the likelihood of a selected analysis area to use a product or service.

**CONSUMER CONCENTRATION**

**What is it?**

The Consumer Concentration Report shows details about demographics, consumer demand and customer data for any selected analysis area(s).
Business issues it can solve for:
- Understand the demographic makeup of your markets.
- Depending on data licensed, shows data pertaining to spend, businesses, IPA, net worth, wire centers, etc.
- Attain a comprehensive overview of your market using any combination for the data listed above.

What questions can it answer/why is it important?
- What is the demographic make-up of my market?
- What is the penetration of data points across my market? i.e. Hispanic penetration rates.
- Calculates the count, % Composition, % Penetration and Index of selected variables for each analysis area.
- Allows for a highly customizable view of data for either quick overviews or comprehensive analysis of markets.

Sample Report Output

<table>
<thead>
<tr>
<th>Analysis Area Code</th>
<th>Analysis Area Name</th>
<th>CY Pop, Hisp/Lat</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Base Count</td>
<td>Base % Comp</td>
</tr>
<tr>
<td>13057</td>
<td>Cherokee County</td>
<td>249,617</td>
</tr>
<tr>
<td>13063</td>
<td>Clayton County</td>
<td>286,113</td>
</tr>
<tr>
<td>13067</td>
<td>Cobb County</td>
<td>752,551</td>
</tr>
<tr>
<td>13135</td>
<td>Gwinnett County</td>
<td>931,763</td>
</tr>
<tr>
<td>15247</td>
<td>Rockdale County</td>
<td>99,504</td>
</tr>
</tbody>
</table>

1. Analysis Area Code/Name: Each analysis area is identified by code and name.
2. Base Count: Number of units within the base selected geography; the units are specified in the parenthesis to the right of the data element name in this case, CY POP. EX) There are 249,617 people in Cherokee County.
3. Base % Comp: The percentage of units in the selected geography compared to the total number of units in the base geography. Ex) Cherokee County makes up 10.76% of the population of the Atlanta CBSA.
4. Count: Number of units for the selected data element within the selected geography. Ex) There are 26,035 Hispanic/Latino people in Cherokee County.
5. % Comp: The percentage of units for the selected data element in the selected geography compared to total number of units for selected behavior in the base geography. Ex) Cherokee County contains 7.13% of the Atlanta CBSA’s Hispanic/Latino population.
6. **% Penetration**: The percentage of units for the selected data element in the selected geography compared to the units in the base geography. Ex) The Hispanic/Latino population makes up 10.43% of Cherokee County’s total population.

7. **Index**: Indicates concentration of the selected data element in an analysis area, based on an average index of 100. Ex) A Hispanic/Latino person is 34% less likely to be found in Cherokee County than the other counties in the Atlanta CBSA.

**Report Formulas**

This analysis uses the following formulas:

- **Percent composition**
  \[
  \frac{\text{Geounit Count}}{\text{Total Count}} \times 100 = \text{Percent Composition}
  \]

- **Percent penetration**
  \[
  \frac{\text{Behavior Count}}{\text{Base Count}} \times 100 = \text{Percent Penetration}
  \]

- **Index**
  \[
  \frac{\text{% Composition of Behavior}}{\text{% Composition of Base}} \times 100 = \text{Index}
  \]

**SEGMENT DISTRIBUTION**

**What is it?**
The Segment Distribution Report shows the geographic distribution of each segment in a specified analysis area. The results of this analysis help determine which segments you should be pinpointing within your chosen analysis area.

**Business issues it can solve for:**
- Understand the make-up of your market and where key segments are located.
- Find high concentrations of households for specified segments.
- Locate customers with desirable characteristics.
- Understand the issues above with current-year or five-year estimates.

**What questions can it answer/why is it important?**
- What segments are prominent in my market?
- How do segments compare across geographies?
Sample Report Output

Segment Distribution

<table>
<thead>
<tr>
<th>Segment Code</th>
<th>Segment Name</th>
<th>Base Area</th>
<th>Champaign et al, IL (548)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Households</td>
<td></td>
<td>Households</td>
</tr>
<tr>
<td></td>
<td>Base Count</td>
<td>% Comp</td>
<td>Count</td>
</tr>
<tr>
<td>01</td>
<td>Upper Crust</td>
<td>1,304,060</td>
<td>1.05%</td>
</tr>
<tr>
<td>02</td>
<td>Networked Neighbors</td>
<td>1,241,889</td>
<td>1.00%</td>
</tr>
<tr>
<td>03</td>
<td>Movers &amp; Shakers</td>
<td>1,768,172</td>
<td>1.43%</td>
</tr>
<tr>
<td>04</td>
<td>Young Digerati</td>
<td>1,841,200</td>
<td>1.49%</td>
</tr>
<tr>
<td>05</td>
<td>Country Squires</td>
<td>2,877,162</td>
<td>2.32%</td>
</tr>
</tbody>
</table>

1. Segment Code/Name: Each segment is identified by code and name.
2. Base Count: Number of households within the segment identified for the selected geography. Ex) There are 1,304,060 households in the Upper Crust segment for the entire U.S.
3. Base % Comp: The percentage of households within each segment compared to the total number of households for all segments in the selected geography. Ex) Upper Crust households represent 1.05% of all households in the US.
4. Count: The number of segment households in the selected geography. Ex) There are 830 Upper Crust households in the Champaign, IL DMA.
5. % Comp: The percentage of households within each segment in the selected geography compared to all segments in the selected geography. Ex) 0.21% of all households in the Champaign, IL DMA fall within the Upper Crust segment.
6. % Pen: The percentage of segment households in the selected geography compared to the segment households in the base geography. Ex) The Champaign, IL DMA makes up 0.06% of all Upper Crust households across the US.
7. Index: Represents the likelihood that the households within a segment fall within the selected geography (based on an average index of 100). Ex) A household that falls within the Upper Crust segment is 80% less likely to be found in the Champaign, IL DMA than the rest of the U.S.

Report Formulas

This analysis uses the following formulas:

- Percent composition (base or behavior)

\[
\frac{\text{Segment/Target Count}}{\text{Total Count}} \times 100 = \text{Percent Composition}
\]
PROFILE WORKSHEET

What is it?
The Profile Worksheet Report provides details on usage of a product or service by each segment within
the entire country or a selected analysis area.

Business issues it can solve for:
- Understand each segment’s usage for a product or service.
- Identify segments with high/low propensity to participate in a behavior for development.
- Add Segment Descriptor columns to cross-reference key demographic characteristics for each
  segment group to create target groups.
- Determine the segments that prime customers fall within.
- Tailor marketing campaigns to reach prime segments.
- Understand key demographic characteristics for potential customers.
- Develop a brand strategy for target consumers.

What questions can it answer/why is it important?
- What segments have the most potential to participate in a certain behavior?
- What are the key demographic characteristics of my target customers?
- What products services are my core customers most interested in?
Sample Report Output

Profile Worksheet

<table>
<thead>
<tr>
<th>Segment Code</th>
<th>Segment Name</th>
<th>Household Education</th>
<th>Types of rest used for breakfast past 30 days</th>
<th>Any coffee house/coffee bar (A)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Base Count</td>
<td>Base % Comp</td>
</tr>
<tr>
<td>01</td>
<td>Upper Crust</td>
<td>Graduate Plus</td>
<td>27,247</td>
<td>1.25%</td>
</tr>
<tr>
<td>02</td>
<td>Networked Neighbors</td>
<td>Graduate Plus</td>
<td>37,283</td>
<td>1.70%</td>
</tr>
<tr>
<td>03</td>
<td>Movers &amp; Shakers</td>
<td>Graduate Plus</td>
<td>55,935</td>
<td>2.56%</td>
</tr>
<tr>
<td>04</td>
<td>Young Digerati</td>
<td>Graduate Plus</td>
<td>18,014</td>
<td>0.82%</td>
</tr>
<tr>
<td>05</td>
<td>Country Squires</td>
<td>Graduate Plus</td>
<td>52,903</td>
<td>2.42%</td>
</tr>
</tbody>
</table>

1. Segment Code/Name: Each segment is identified by code and name.
2. Segment Descriptors: Within the prompt there is the option to include columns of demographic descriptors for each segment. Ex) 03 Movers & Shakers: Household Education, Graduate Plus.
3. Profile Count: The total number of estimated households or adults, within each segment, that are likely to fit that behavior. Ex) There are 13,757 Movers & Shakers adults in the Atlanta CBSA that are estimated to have visited a coffee house within the last 30 days.
4. Profile % Comp: The percentage of households or adults within each segment who fit the behavior, compared to all segments who fit the behavior in the selected geography. Ex) Of all the adults in the Atlanta CBSA that are estimated to have visited a coffee house within the last 30 days, 3.78% fall within the Movers & Shakers segment.
5. Profile Index: Represents the likelihood that a HH or adult fits the profile (based on an average index of 100). Ex) An adult that falls within the Movers & Shakers segment is 48% more likely to visit a coffee house than the average HH in the Atlanta CBSA.

Report Formulas

This analysis uses the following formulas:

- Percent composition (base or behavior)

\[
\frac{\text{Segment Count}}{\text{Total Count}} \times 100 = \text{Percent Composition}
\]

- Users per 100 households

\[
\frac{\text{Behavior Count}}{\text{Base Count}} \times 100 = \text{Users / 100 HHs}
\]
TARGET SEGMENT MEASURES

What is it?
The Target Segment Measures Report shows the propensity of targets and/or segments to engage in various profile behaviors. The results of this analysis help determine which behaviors to emphasize when developing marketing campaigns.

Business issues it can solve for:
- Reach more of your targets based on observed media/lifestyle behaviors.
- Identify a way to tailor your message and understand their lifestyle to engage your customer and drive action.
- Understand advertising strategy; media consumption.
- Identify cross-sell opportunities.
- Make your ad spend more efficient.

What questions can it answer/why is it important?
- Where your target consumers eat, shop, travel and play.
- What is the most effective media to reach target consumers?
- What are the behavior and usage patterns amongst your target consumers?
- What are effective channels to reach a select audience?

Sample Report Output

<table>
<thead>
<tr>
<th>Target Segment Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile List Title</strong></td>
</tr>
<tr>
<td>Total Profile Count</td>
</tr>
<tr>
<td>Sports Event (House)</td>
</tr>
<tr>
<td>Sports Commentary (1)</td>
</tr>
<tr>
<td>Sitcom Comedy (2)</td>
</tr>
<tr>
<td>Quiz Give Away (House)</td>
</tr>
<tr>
<td>Popular Music (House)</td>
</tr>
<tr>
<td>Participation Variety (2)</td>
</tr>
</tbody>
</table>

1. Total Profile Count: Total number of households that purchased or used the product or service. Ex) There are an estimated 110,636,089 Households in the U.S. that watch sports events on TV.
2. Total Profile Users/100 HHs: Proportion of households within each profile behavior compared to the total household Base Count. Ex) Out of every 100 households in the U.S., 89.69 households are estimated to watch sports events on TV.

3. Count: The total number of estimated households or adults, within the target/segment, that are likely to fit that behavior. Ex) There are an estimated 9,611,661 households in the Midlife Success target that watch sports events on TV.

4. % Total: The percentage of households/adults in the target/segment reported for the profile behavior compared to the total number of all households/adults who engage in the profile behavior. Ex) Of all households in the U.S. that are estimated to watch sports events on TV, 8.69% fall within the Midlife Success target.

5. Users/100 Households: The proportion of households/adults who have the profile behavior within the selected target/segment compared to the total households for the selected target/segment. Ex) Out of every 100 Midlife Success households in the U.S., there are an estimated 86.64 households who watch sports events on TV.

6. Index: Index represents the likeliness that a household in the selected target/segment fits the comparison profile (based on an average index of 100). Ex) Households in the Midlife Success target are 3% less likely to watch sports events on TV than other households in the U.S.

**Report Formulas**

This analysis uses the following formulas:

- **Users per 100 households**
  \[
  \text{Users per 100 households} = \frac{\text{Total Profile Behavior Count}}{\text{Total Target (or Segment) Count}} \times 100
  \]

- **Percent Total**
  \[
  \text{Percent Total} = \frac{\text{Behavior Target Count}}{\text{Total Profile Behavior Count}} \times 100
  \]

- **Index**
  \[
  \text{Index} = \frac{\text{Users/100 HHs of Target}}{\text{Users/100 HHs of Total Profile}} \times 100
  \]

**TARGET CONCENTRATION**

**What is it?**

The Target Concentration report shows the household distribution of selected targets and/or segments in an analysis area compared to total households in the analysis area. The results of this analysis help determine which geounits you should be pinpointing within your chosen comparison analysis area.
Business issues it can solve for:

- Locate concentrations and projected counts of a single set of potential customer households in a given area.
- Rank geographies within a market based on potential for households from a single target.

What questions can it answer/why is it important?

- Which ZIP codes (or other geographic level) are the best choice to reach your primary target?
- What is the projected household count for the primary target in a selected market?
- Does the target yield enough potential customers for the selected geographies?
- Which areas index highest for key desired segments?
- What market offers the strongest opportunity to reach desired consumers?

Sample Report Output

<table>
<thead>
<tr>
<th>Analysis Area Code</th>
<th>Analysis Area Name</th>
<th>Y1 Midlife Success [04, 13, 21, 25, 31, 34, 35]</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Base Count</td>
</tr>
<tr>
<td>13089</td>
<td>DeKalb County</td>
<td>302,590</td>
</tr>
<tr>
<td>13057</td>
<td>Cherokee County</td>
<td>89,105</td>
</tr>
<tr>
<td>13067</td>
<td>Cobb County</td>
<td>290,052</td>
</tr>
<tr>
<td>13117</td>
<td>Forsyth County</td>
<td>77,760</td>
</tr>
<tr>
<td>13121</td>
<td>Fulton County</td>
<td>436,064</td>
</tr>
<tr>
<td>13135</td>
<td>Gwinnett County</td>
<td>306,011</td>
</tr>
</tbody>
</table>

1. Analysis Area Code/Name: Each analysis area is identified by code and name.
2. Base Count: Number of households within the base selected geography. Ex) There are 302,590 households in DeKalb County.
3. Base % Comp: The percentage of households in the selected geography compared to the total number of households in the base geography. Ex) DeKalb County makes up 20.07% of the households in the Atlanta CBSA.
4. Count: Number of target/segment households in selected geography. Ex) There are 53,284 Midlife Success households in DeKalb County.
5. % Comp: The percentage of target/segment households in the selected geography compared to total target/segment households in the base geography. Ex) DeKalb County contains 25.52% of the Atlanta CBSA’s Midlife Success households.
6. % Penetration: The percentage of target/segment households in the selected geography compared to the total household count in the selected geography. Ex) Midlife Success households make up 17.61% of DeKalb County’s total households.
7. Index: Indicates concentration of the target/segment households in an analysis area,(based on an average index of 100). Ex) A Midlife Success household is 27% more likely to be found in DeKalb County than the other counties in the Atlanta CBSA.

**MARKET POTENTIAL**

**What is it?**

The Market Potential Report compares the 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.

**Business issues it can solve for:**

- Identify opportunities for selling a product or service.
- Identify analysis areas to find potential locations to promote products and services.
- Compare usage patterns for your products, competitive products and similar products in one or more analysis areas.
- Rank the penetration of products and services in one or more analysis areas.

**What questions can it answer/why is it important?**

- Where is the opportunity for my product or service?
- Where is the opportunity for a new or competitor's product or service?
- How can I identify areas for potential locations?
## Sample Report Output

### Market Potential

<table>
<thead>
<tr>
<th>Analysis Area Code</th>
<th>Analysis Area Name</th>
<th>Base Count</th>
<th>Base % Comp</th>
<th>Estimated Users</th>
<th>% Comp</th>
<th>Users/100 HHs</th>
<th>Market Potential Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>13117</td>
<td>Forsyth County</td>
<td>77,760</td>
<td>3.55%</td>
<td>15,507</td>
<td>4.70%</td>
<td>19.94</td>
<td>132</td>
</tr>
<tr>
<td>13113</td>
<td>Fayette County</td>
<td>41,293</td>
<td>1.89%</td>
<td>7,016</td>
<td>2.13%</td>
<td>16.99</td>
<td>113</td>
</tr>
<tr>
<td>13057</td>
<td>Cherokee County</td>
<td>89,105</td>
<td>4.07%</td>
<td>15,123</td>
<td>4.58%</td>
<td>16.97</td>
<td>112</td>
</tr>
<tr>
<td>13067</td>
<td>Cobb County</td>
<td>290,052</td>
<td>13.26%</td>
<td>47,439</td>
<td>14.37%</td>
<td>16.36</td>
<td>108</td>
</tr>
<tr>
<td>13135</td>
<td>Gwinnet County</td>
<td>306,011</td>
<td>13.99%</td>
<td>49,091</td>
<td>14.87%</td>
<td>16.04</td>
<td>106</td>
</tr>
</tbody>
</table>

1. **Analysis Area Code/Name**: Each analysis area is identified by code and name.
2. **Base Count**: Total number of households within the selected geography. Ex) There are 77,760 households in Forsyth County.
3. **Base % Comp**: The percentage of households in the selected geography compared to the total number of households in the base geography. Ex) Forsyth County makes up 3.55% of the households in the Atlanta CBSA.
4. **Estimated Users**: The total number of households/adults in each analysis area that fit the profile behavior. Note that if this is an adult profile, which is donated by ‘(A)’ in the profile name, this will be the estimated number of adults; otherwise, it is the estimated number of households. Ex) There are an estimated 15,507 households in Forsyth County that have a wearable device.
5. **% Comp**: The percentage of estimated users in the selected geography compared to the total number of estimated users in the base geography. Ex) 4.70% of wearable device users in the Atlanta CBSA are located in Forsyth County.
6. **Users/100 HHs**: The proportion of households/adults that have the profile behavior compared to the total households in the selected geography. Ex) Out of every 100 households in Forsyth County, there are an estimated 19.94 households that have a wearable device.
7. **MPI**: The likelihood that the selected geography has households with the profile behavior, as compared to the base geography. Ex) Forsyth County is 32% more likely to have households with a wearable device when compared to other counties in the Atlanta CBSA. An index of 100 is considered average. (Note: If the data was run with the Analysis Area Index prompt turned off, the index compares to the entire U.S. instead of the base geography.)
Report Formulas

This analysis uses the following formulas:

- Estimated users:
  For simplicity in this example, assume that ZIP Code 12345 contains only the following two segments.

<table>
<thead>
<tr>
<th>Segment</th>
<th>Household Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment 01</td>
<td>450</td>
<td>45%</td>
</tr>
<tr>
<td>Segment 02</td>
<td>550</td>
<td>55%</td>
</tr>
<tr>
<td>Total</td>
<td>1,000</td>
<td>100%</td>
</tr>
</tbody>
</table>

  Based on an example profile, assume 20% of Segment 01 uses the product and 10% of Segment 02 uses the product. The total number of households in ZIP Code 12345 that use the product is calculated as follows:

  \[
  \text{Total HHs in ZIP Code 12345 that use the Product} = 145
  \]

- Percent Penetration

  \[
  \text{Percent Penetration} = \left( \frac{\text{Estimated User Count}}{\text{Base Count}} \right) \times 100
  \]

- Market Potential Index (MPI)

  \[
  \text{MPI} = \left( \frac{\text{Estimated User Count}}{\text{Base Count}} \right) \times \frac{\text{Profile Total Behavior Count}}{\text{Profile Total Base Count}} \times 100
  \]