

# ArcGIS® 9

## Using ArcGIS Business Analyst Segmentation Module



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# Chapter 1 - Introduction

A cornerstone of business success is a thorough knowledge of your company's customer base. This means actually knowing all about the *types of people* who purchase your company's products or services. Accurate and precise customer knowledge can increase a company's effectiveness - and its revenues - in many ways, such as:

- Opening agencies in the right locations
- Evaluating the success of existing locations
- Selecting product and service offerings suited to the customers in the specific trade or market area
- Directing advertising with the right message to the right audience
- Targeting direct mail and other promotions to the most responsive recipients

Company time and money are used more effectively when accurate customer knowledge is considered *before* expensive business and marketing plans are launched. For these reasons, it is critical for you to understand as much as you can about your customers.

Using the Segmentation Module can help you define certain customer issues, including:

- Understanding the characteristics of your target customers
- Analyzing your customer's lifestyle characteristics
- Determining where more of these types of customers live
- Discovering the untapped potential in a market
- Developing strategies to bring customers to your products and services

*Customer profiling and analysis* is a first step to acquiring this valuable knowledge. The process can be equated to painting a picture: the more detail that is added to the picture, the more defined the picture becomes. Using the Segmentation Module you can "paint" your customer profile by using data from several sources to fill in your customer "picture." When the customer profiling analysis is complete, a detailed picture of your customers emerges. In the following sections, we describe the process of compiling a detailed customer profile and analysis and the benefits derived from the analysis.

To create a customer profile you must have a table or database that contains a list of your customers and their home addresses. A customer's address is the key that allows us to determine where they live and to link them to a segment that identifies the types of people they are. Any additional information you have about your customers, such as amount spent, number of visits, or number of items purchased is helpful and can be used to better understand and identify your best customers.

## Chapter 2 – Create Profiles

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The first step of any segmentation analysis is creating a profile. A profile is a summarization of geographic, customer, or survey data across all segments which make up the segmentation system being used. For the purpose of this documentation, we will use ESRI's Community™ Tapestry™ segmentation system.

The Community Tapestry segmentation system represents the fourth generation of market segmentation systems that were first developed 30 years ago. Community Tapestry classifies U.S. neighborhoods into 65 market segments based on their socioeconomic and demographic composition. Neighborhoods with the most similar characteristics are grouped together, and neighborhoods showing divergent characteristics are separated.

U.S. consumer markets are different and diverse. Capturing the essence of each market to characterize those differences requires sorting the most accurate and powerful data available using a wide array of attributes. Each neighborhood is analyzed and sorted by more than 60 attributes including income, source of income, employment, home value, housing type, occupation, education, household composition, age, and other key determinants of consumer behavior. To capture the subtlety and vibrancy of the U.S. marketplace, data sources include Census 2000, proprietary ESRI demographic updates, the Axciom InfoBase consumer database, the Mediamark Research Inc. national consumer survey, and other sources.

Segment analysis is also used to develop LifeMode Groups. The 65 segments are combined into 12 LifeMode groups that share similar demographic characteristics and consumer behavior patterns. The 11 Urbanization groups present an alternate way of combining the 65 segments based on geographic and physical features of the segments along with income. These groups provide broad overviews of the segments and are ideal for projects that require a less granular approach than reviewing all 65 market segments.

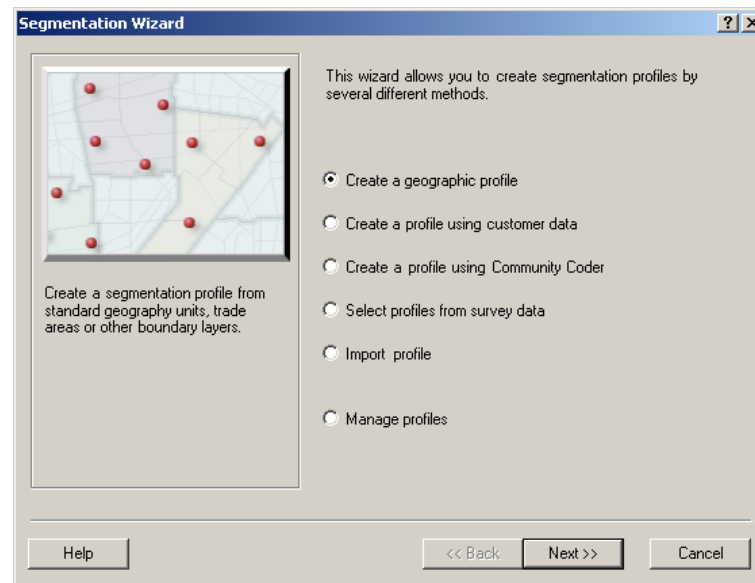
The true power of Tapestry is its ability to not only profile consumer markets, but to also link any market or any address list of customers to any independent database, such as consumer surveys and expenditure data. The Tapestry link enables ESRI to measure, for example, relative demand for products or services *and* consumer expenditures. This link allows you to learn more about customer lifestyle characteristics and behavior such as media, product, and purchase preferences.

## Create a geographic profile

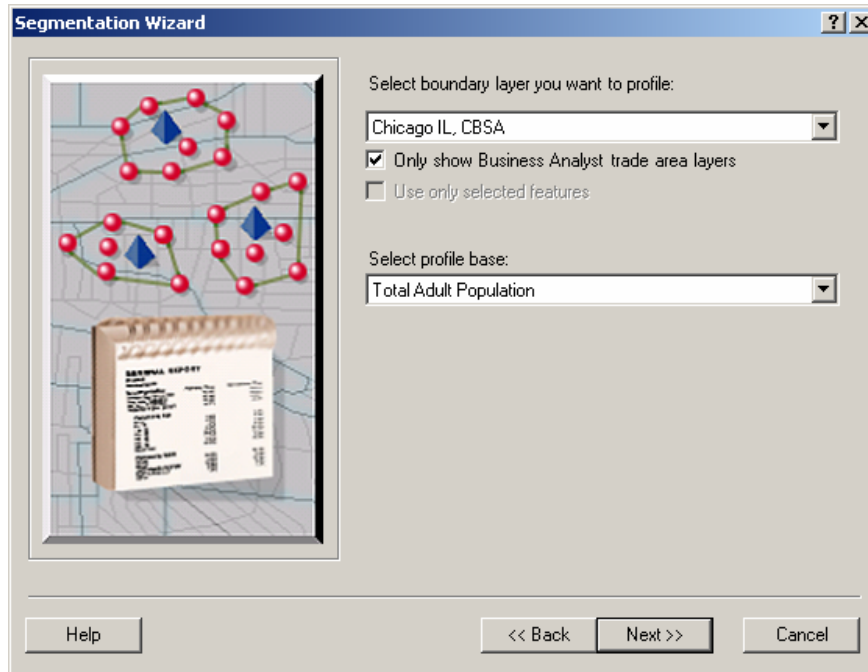
A geographic profile provides a summarization of all the households or adults in a specific geographic area summarized across all segments. In most cases you will create a geographic profile to use as the base when analyzing your customer profile.

### Create a geographic profile

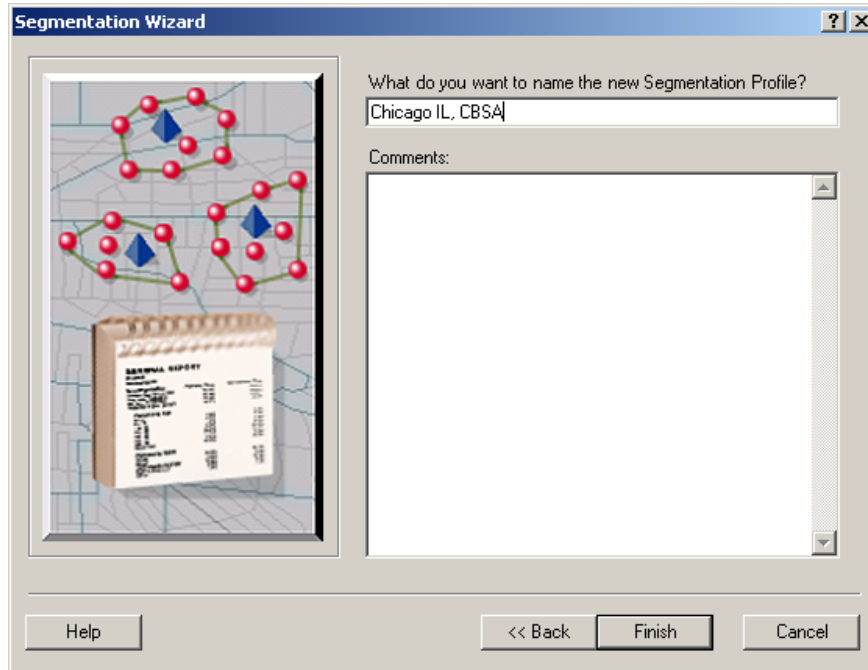
1. The first step in creating a geographic profile is to create a trade area for the geographic area of interest using the Trade Area wizard on the Business Analyst Drop-down main menu. (See Using ArcGIS Business Analyst guide for instructions.)
2. Select Segmentation, Create Profiles from the Business Analyst Drop-down main menu
3. Select Create a geographic profile, then click Next.



4. Select the Business Analyst trade area by selecting the *Select boundary layer you want to profile* drop-down menu. You can narrow down the list to just trade areas created using the Business Analyst Trade Area wizard by checking the *Only show Business Analyst trade area layers* box. Next, select either Total Adult Population or Total Households from the *Select profile base* drop-down menu. Select Total Adult Population if your product is purchased or used by multiple adults in a household (i.e. Automotive oil change service) or select Total Households if your product is primarily purchased for use by the entire household (i.e. Dining room furniture).



5. Enter a name for your profile in the *What do you want to name the new segmentation profile* box and click Finish. You can also add optional comments regarding this geographic profile.





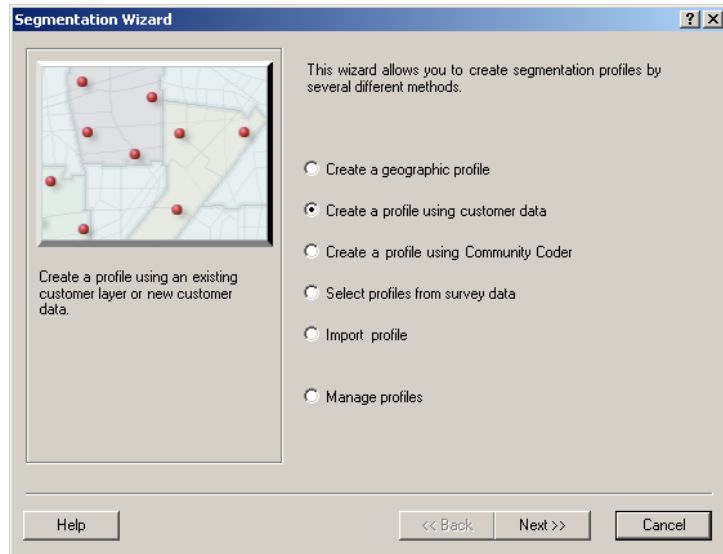
## Create a profile using customer data

A customer profile provides a summarization of all your customers across all segments. Using this option you can create a customer profile based on a previously created Customer Layer or based on a table with customer address information that has been added to the Business Analyst Display.

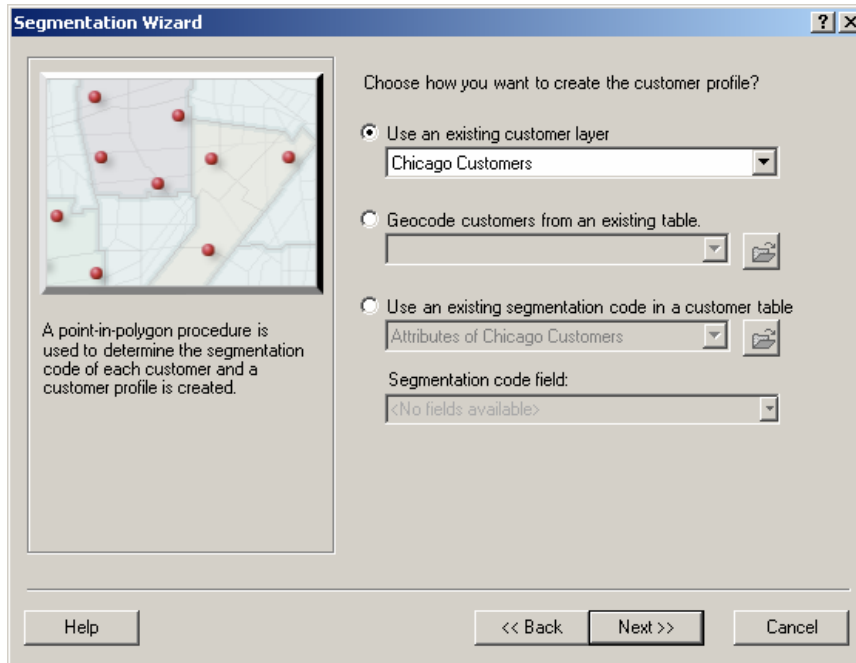
Using this wizard you can choose from three options for creating your customer profile: create a profile from an existing Business Analyst layer; create a profile from a table containing customer information including address; or create a profile from a table containing customer information which already includes a segment code. It is best to create a customer profile from a table of customers that contains address information or a segment code. A customer profile created using an existing Business Analyst customer layer uses a point-in-polygon procedure to determine the segmentation code of each customer and will process significantly slower than creating the profile using the other two methods.

### Create a profile using customer data

1. The first step in creating a customer profile is to add the table that contains your customer data to the Business Analyst display or to create a customer layer using the Customer Setup wizard on the Business Analyst Drop-down main menu. (See Using ArcGIS Business Analyst guide for instructions.)
2. Select Segmentation, Create Profiles from the Business Analyst Drop-down main menu
3. Select *Create a profile using customer data* and click Next.



4. Select one of the three options available to create a customer profile. Use the first option only if you do not have a customer file that contains either the customer's address or the customer's Tapestry Code. A customer profile created using an existing customer layer uses a point-in-polygon procedure to determine the segmentation code of each customer and will be significantly slower than creating the profile using the other two methods. Use the second option if you have a customer file that contains the customer's address, but does not contain the associated Tapestry Code. This option is faster than the first one, but still takes a long time to process.



### Option 1 – Use an existing customer layer

This option uses a point-in-polygon approach with the customer points and block group boundaries to obtain the block group Tapestry assignment. Select your customer layer from the *Use an existing customer layer* drop-down box and click Next.

A customer profile can be created with volume information. If the customer layer selected contains a field with volume information (such as number of visits, items purchased, dollar amount spent, etc.) you can specify that information by selecting the *Use volume information* check box and selecting the volume field from your customer layer using the drop-down menu just below the check box. Next select the appropriate base for your customer profile and click Next. Select either Total Adult Population or Total Households from the *Select profile base* drop-down menu. Select Total Adult Population if your product is purchased or used by multiple adults in a household (i.e. Automotive oil change service) or select Households if your product is primarily purchased for use by the entire household (i.e. Dining room furniture).

Segmentation Wizard

Customer profiles can be created with volume information (ie. Dollars spent per customer, total volume consumed, units purchased).

Use volume information (optional)

Specify the field containing volume information for each customer:

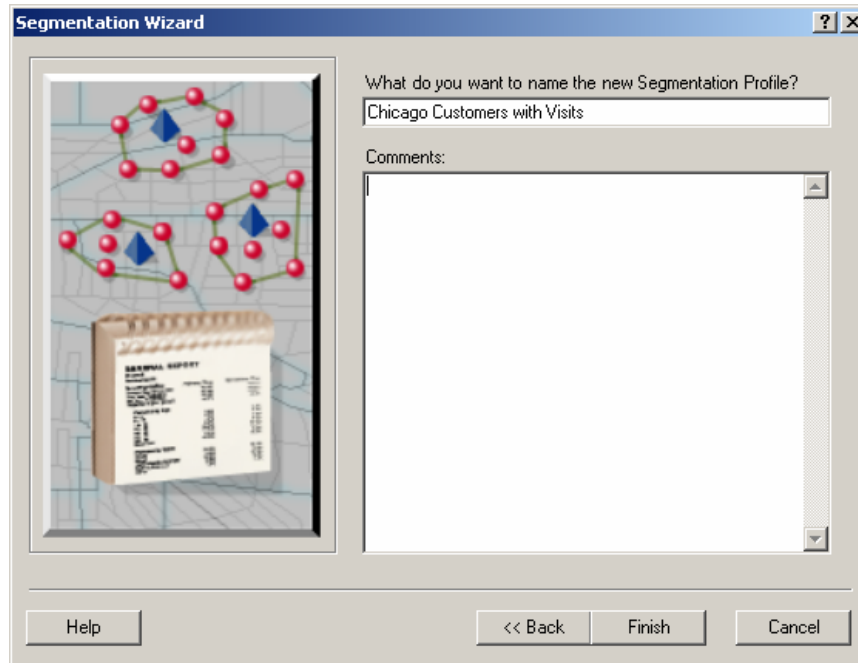
VISITS

Select profile base:

Total Adult Population

Help << Back Next >> Cancel

Enter a name for your new customer profile and enter any optional comments and then click Finish.



This operation will process for quite a long time depending on the number of customers in your table since this method assigns the segmentation code using a point-in-polygon assignment method.

When processing is completed, a summarization of your customer data by Tapestry segment will be displayed and a Business Analyst customer profile will be created. The display table below can be sorted in either ascending or descending order by any of the columns. Click on the column header to toggle between the two sort orders.

Segment ID	Segment Name	Count	Weight	Volume Info
1	Top Rung	5	0.751	90
2	Suburban Splendor	11	0.092	11
3	Connoisseurs	13	0.108	13
4	Boomburbs	5	0.042	5
5	Wealthy Seaboard Suburbs	85	0.826	99
6	Sophisticated Squires	38	0.375	45
7	Exurbanites	15	0.125	15
8	Laptops and Lattes	43	0.367	44
9	Urban Chic	10	0.083	10
10	Pleasant-Ville	311	3.153	378
11	Pacific Heights	0	0	0
12	Up and Coming Families	9	0.108	13
13	In Style	26	0.234	28
14	Prosperous Empty Nesters	81	0.776	93
15	Silver and Gold	1	0.008	1
16	Enterprising Professionals	5	0.042	5
17	Green Acres	4	0.067	8
18	Cozy and Comfortable	639	6.856	822
19	Milk and Cookies	95	0.942	113
20	City Lights	200	2.185	262
21	Urban Villages	568	6.305	756

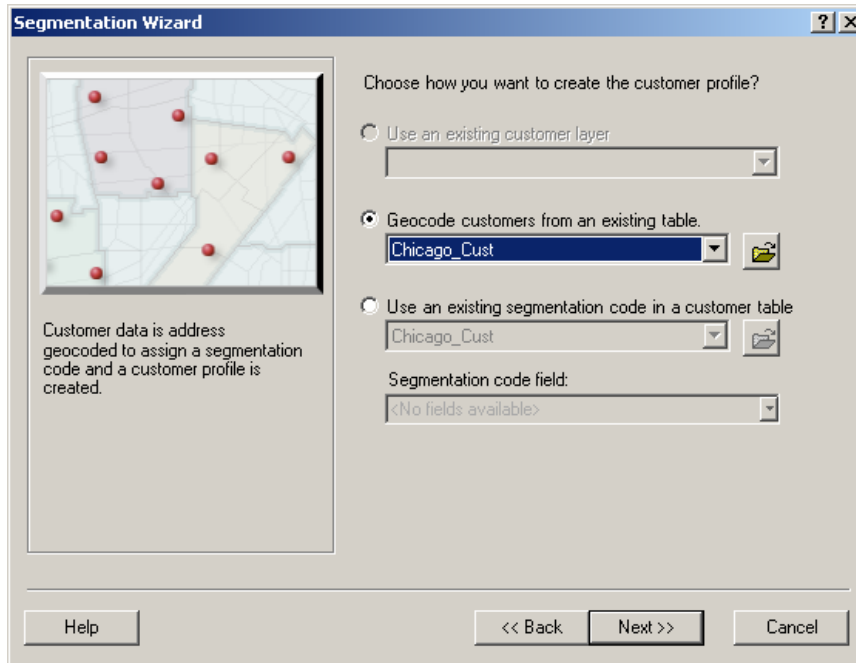
*Count* – the count of customers in a Tapestry segment

*Weight* – *Weight* is calculated by multiplying the *Volume Info* for each segment by 100 and dividing by the total volume for all segments.

*Volume Info* – volume represents customer information such as number of visits, items purchased, dollar amount spent, etc. *Volume Info* is calculated by summing the volume values on each customer record by segment and dividing by 100. *Volume Info* is the same as *Count* if you do not set an optional volume field.

### Option 2 – Geocode customers from an existing table

This option uses the Business Analyst geocoder to append block group codes to customer records and then appends the corresponding block group Tapestry codes to those records. If a block group assignment cannot be made, a census tract assignment will be made instead. Create a customer profile using a table that contains customer address information. Select the table that contains your customer information from the *Geocode customers from existing table*. If the table is already in the Business Analyst display, select it from the drop-down menu. Otherwise, click the folder button to browse to the table and click Next.



Next, you need to assign the address input fields to the appropriate field in the table that contains your customer information.

Use the *Street or Intersection* drop-down menu to choose from available fields in your customer file to assign the customer street address used for geocoding and segment assignment. Use the *City* drop-down menu to choose from available fields in your customer file to assign the city associated with the customer address. Use the *State* drop-down menu to choose from available fields in your customer file to assign the state associated with the customer address. Use the *ZIP code* drop-down menu to choose from available fields in your customer file to assign the 5-digit ZIP code associated with the customer address. Use the optional *ZIP extension* drop-down menu to choose from available fields in your customer file to assign the ZIP+4 code associated with the customer address.

All input fields must be assigned to separate fields in your customer table. (For example, you will need to separate the 5-digit ZIP code from the ZIP+4 code). Once you have assigned as many fields as possible, click Next.

Segmentation Wizard

Address Input Fields

Street or Intersection ADDRESS

City CITY

State ST

ZIP code ZIP

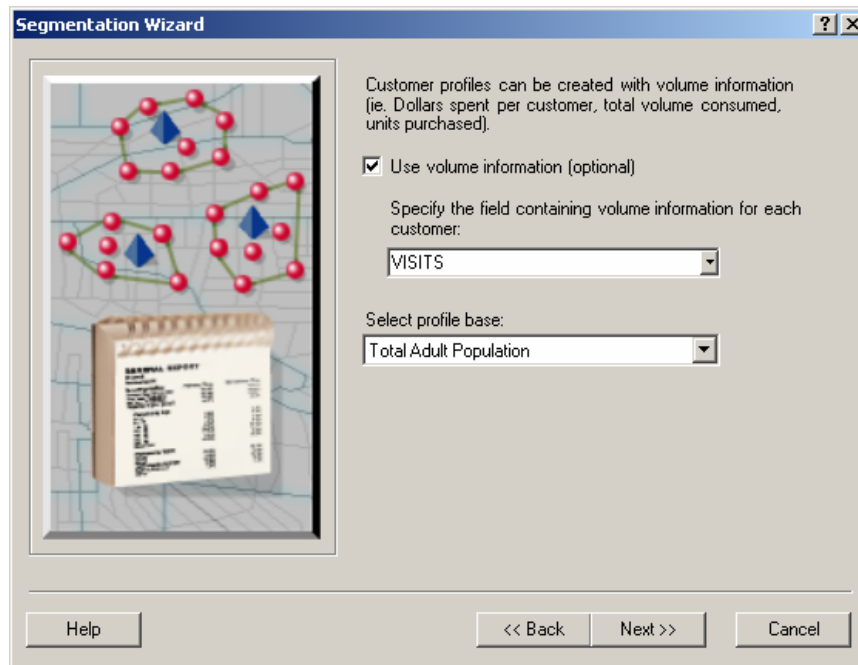
ZIP extension Z4

Locator Help Options...

Help << Back Next >> Cancel

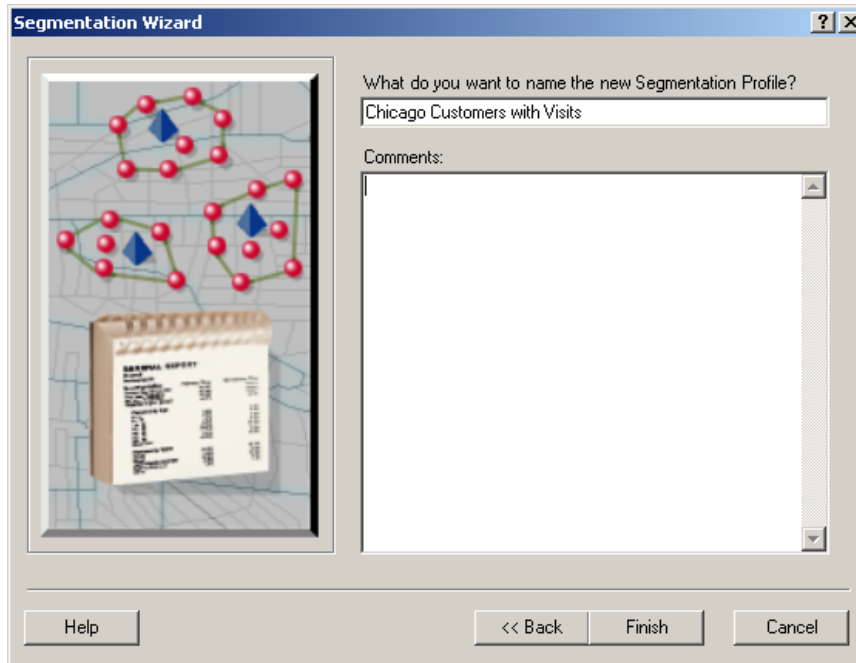
A customer profile can be created with volume information. If the table that contains your customer information includes a field with volume information (such as number of visits, items purchased, dollar amount spent, etc.) you can specify that information by selecting the *Use volume information* check box and selecting the volume field from your customer layer using the drop-down menu just below the check box. This drop-down menu also has an option to filter the list of available fields by entering a string of characters in the *Filter* field with the option to check the *Match case* option to make the filter case sensitive.

Next, select the appropriate base for your customer profile and click Next. Select either Total Adult Population or Total Households from the *Select profile base* drop-down menu. Select Adult Population if your product is purchased or used by multiple adults in a household (i.e. Automotive oil change service) or select Households if your product is primarily purchased for use by the entire household (i.e. Dining room furniture).





Enter a name for your new customer profile and enter any optional comments and then click Finish.



Using this option, customer data is address geocoded and a segmentation code is assigned to each customer. A summarization of your customer data by Tapestry segment will be displayed and a Business Analyst customer profile will be created.

Segment ID	Segment Name	Count	Weight	Volume Info
1	Top Rung	5	0.751	90
2	Suburban Splendor	11	0.092	11
3	Connoisseurs	13	0.108	13
4	Boomburbs	5	0.042	5
5	Wealthy Seaboard Suburbs	85	0.826	99
6	Sophisticated Squires	38	0.375	45
7	Exurbanites	15	0.125	15
8	Laptops and Lattes	43	0.367	44
9	Urban Chic	10	0.083	10
10	Pleasant-Ville	311	3.153	378
11	Pacific Heights	0	0	0
12	Up and Coming Families	9	0.108	13
13	In Style	26	0.234	28
14	Prosperous Empty Nesters	81	0.776	93
15	Silver and Gold	1	0.008	1
16	Enterprising Professionals	5	0.042	5
17	Green Acres	4	0.067	8
18	Cozy and Comfortable	639	6.856	822
19	Milk and Cookies	95	0.942	113
20	City Lights	200	2.185	262
21	Urban Villages	568	6.305	756

*Count* – the count of customers in a Tapestry segment

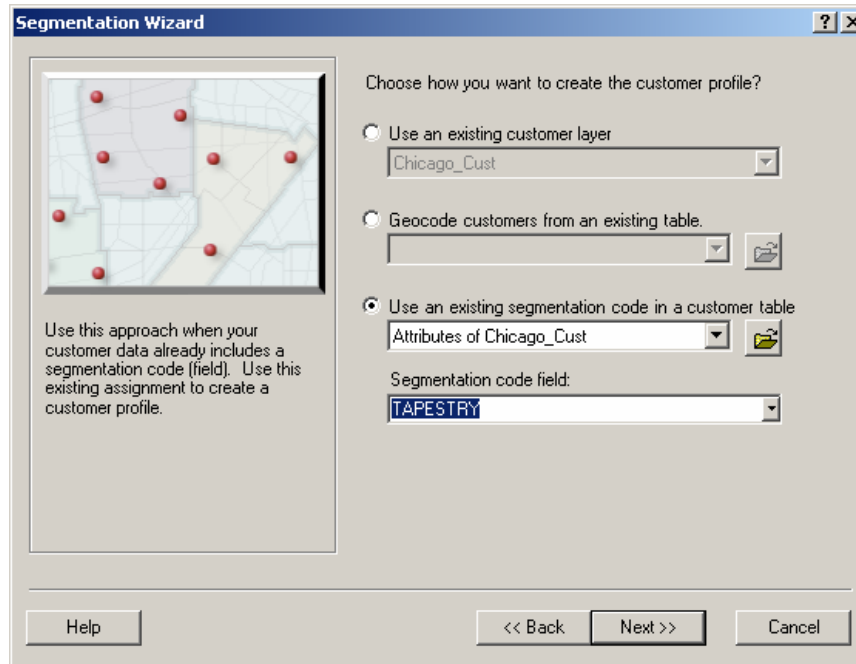
*Weight* – *Weight* is calculated by multiplying the *Volume Info* for each segment by 100 and dividing by the total volume for all segments.

*Volume Info* – volume represents customer information such as number of visits, items purchased, dollar amount spent, etc. *Volume Info* is calculated by summing the volume values on each customer record by segment and dividing by 100. *Volume Info* is the same as *Count* if you do not set an optional volume field.

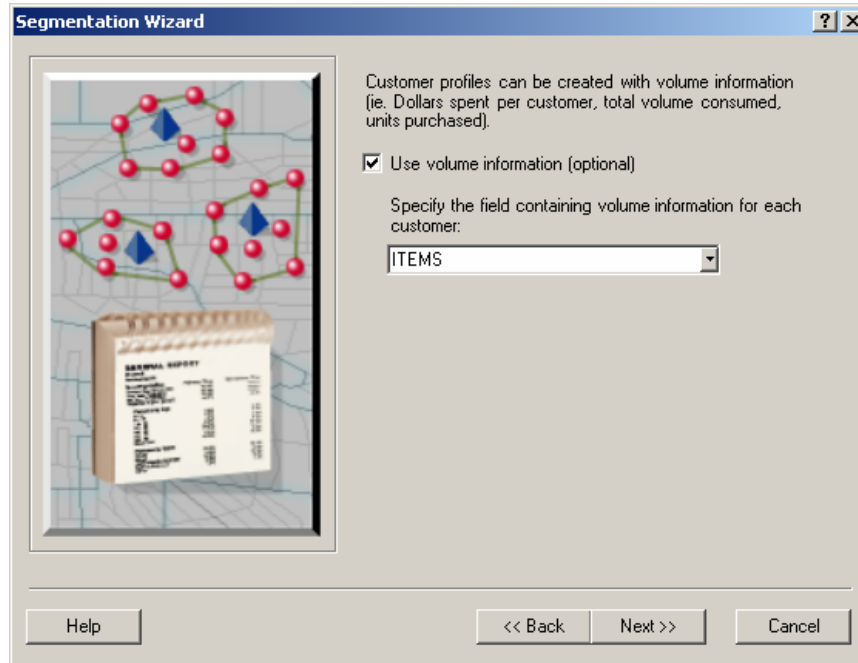
### Option 3 – Use an existing segmentation code in a customer table

Create a customer profile using a table that contains a segmentation assignment code. Use this option if you have a table that already contains a list of customers with their associated Tapestry code as a field in the table. This is the preferred option since it runs very quickly.

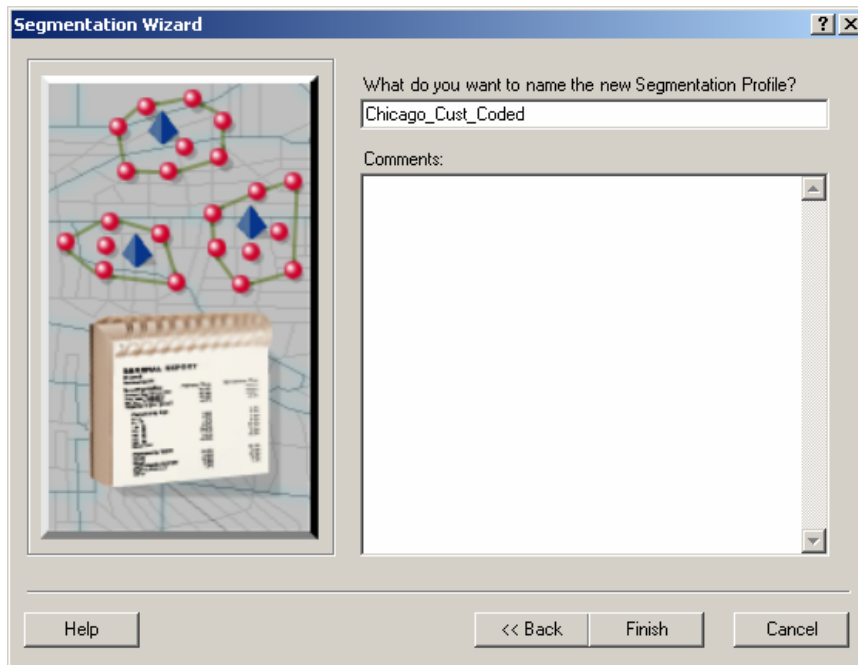
Click on the *Use an existing segmentation code in a customer table* and select the table that contains your customer information. If this table is already in the Business Analyst display, select it from the drop-down menu. Otherwise, click the folder button to browse to the table. Select the field that contains the segmentation code assignment from the drop-down box of available fields and click Next.



A customer profile can be created with volume information. If the table that contains your customer information includes a field with volume information (such as number of visits, items purchased, dollar amount spent, etc.) you can specify that information by selecting the *Use volume information* check box and selecting the volume field from your customer layer using the drop-down menu just below the check box. This drop-down menu also has an option to filter the list of available fields by entering a string of characters in the *Filter* field with the option to check the *Match case* option to make the filter case sensitive. Click Next to continue.



Enter a name for your new customer profile and enter any optional comments and then click Finish.



A summarization of your customer data by Tapestry segment will be displayed and a Business Analyst customer profile will be created.


Segment ID	Segment Name	Count	Weight	Volume Info
1	Top Rung	0	0	0
2	Suburban Splendor	0	0	0
3	Connoisseurs	0	0	0
4	Boomburbs	0	0	0
5	Wealthy Seaboard Suburbs	0	0	0
6	Sophisticated Squires	0	0	0
7	Exurbanites	0	0	0
8	Laptops and Lattes	0	0	0
9	Urban Chic	0	0	0
10	Pleasant-Ville	317	1.942	5684
11	Pacific Heights	0	0	0
12	Up and Coming Families	9	0.040	118
13	In Style	27	0.129	378
14	Prosperous Empty Nesters	81	0.437	1279
15	Silver and Gold	1	0.005	16
16	Enterprising Professionals	5	0.011	32
17	Green Acres	4	0.021	208
18	Cozy and Comfortable	648	4.124	12071
19	Milk and Cookies	95	0.515	1508
20	City Lights	199	1.206	3529
21	Urban Villages	583	3.250	9513

*Count* – the count of customers in a Tapestry segment

*Weight* – *Weight* is calculated by multiplying the *Volume Info* for each segment by 100 and dividing by the total volume for all segments.

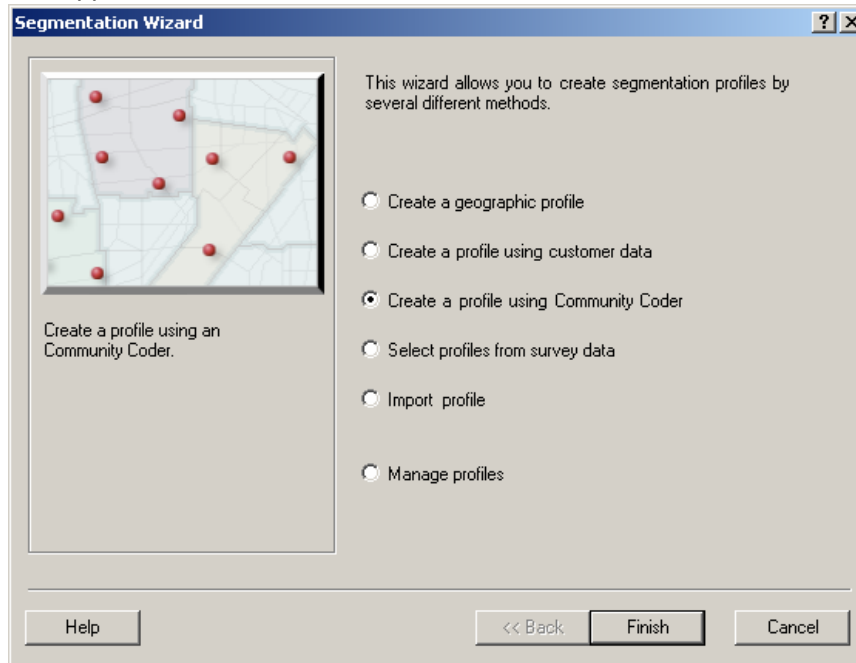
*Volume Info* – volume represents customer information such as number of visits, items purchased, dollar amount spent, etc. *Volume Info* is calculated by summing the volume values on each customer record by segment and dividing by 100. *Volume Info* is the same as *Count* if you do not set an optional volume field.

## Create a profile using Community Coder

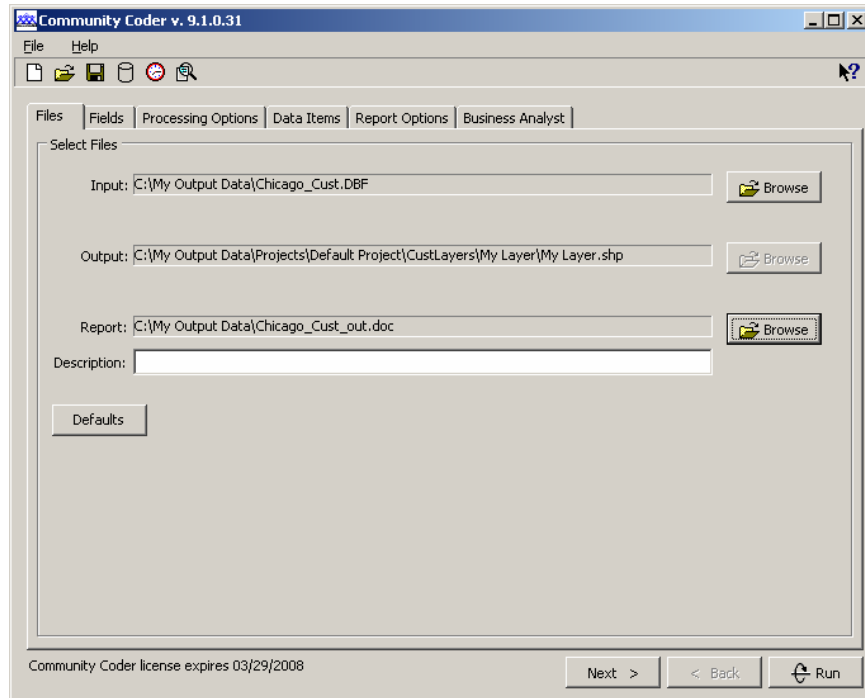
A customer profile provides a summarization of all your customers across all segments. Using ESRI's Community Coder software, which is included with the Business Analyst Segmentation Module Add-on, this option gives you the greatest flexibility to create profiles and reports based on customer information stored in any file or table. Community Coder is a fast, user-friendly desktop software program that assigns detailed information and location data to customer records, either individually or in batch mode. Using this option provides you with the quickest and easiest way to create a customer profile to be used in Business Analyst. Use the information tool  available in the Community Coder software to learn more about the various processing options available.

### Create a profile using Community Coder

1. Select Segmentation, Create Profiles from the Business Analyst Drop-down main menu
2. Select *Create a profile using Community Coder* and click Finish. This will automatically launch the Community Coder application.



- Using the Community Coder interface, select an input file that contains your customer information using the Browse button. The output file will default to My Layer.shp. Next, set the name of the document that will include any reports selected during the coding process by clicking the browse button and then clicking Next.

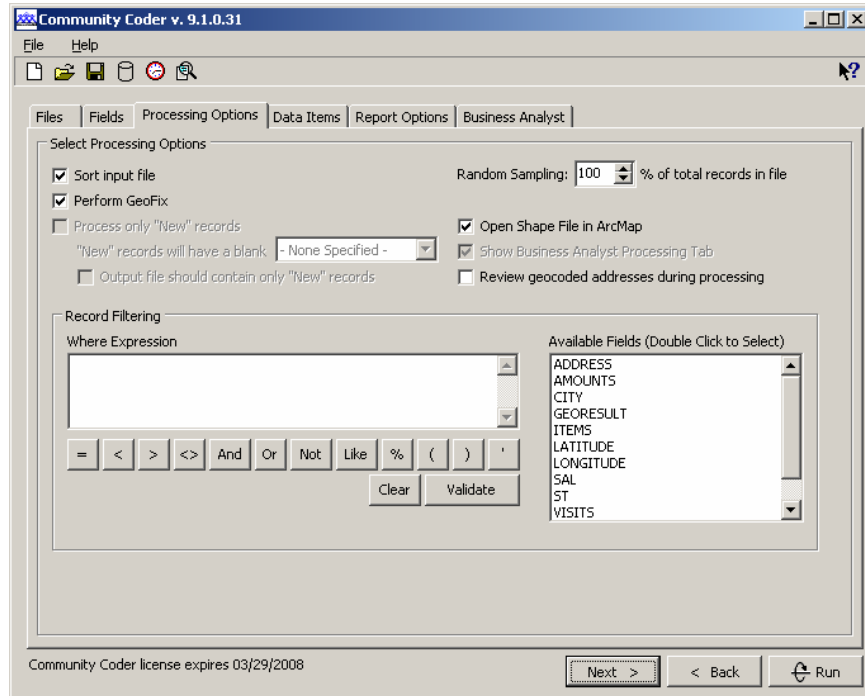




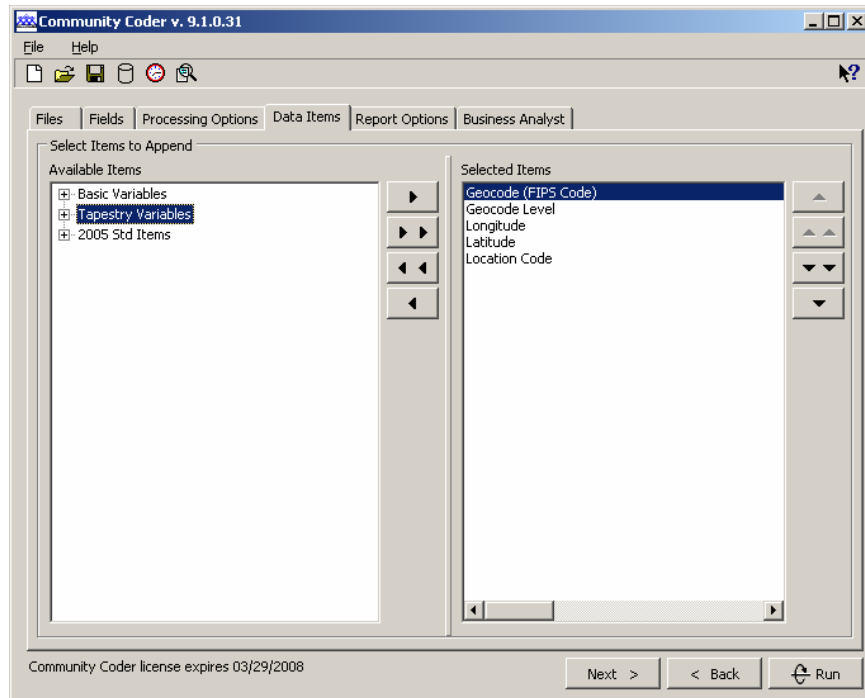
- Next, assign the address input fields to the appropriate field in the input file that contains your customer information. Use *Address* drop-down menu to choose from available fields in your customer file to assign the customer street address used for geocoding and segment assignment. Use the three *City/State/ZIP Code* drop-down menus to choose from available fields in your customer file to assign first the city associated with the customer address. Use the second drop-down menu to choose from available fields in your customer file to assign the state associated with the customer address. Use the third drop-down menu to choose from available fields in your customer file to assign the 5-digit ZIP code associated with the customer address. All input fields must be assigned to separate fields in your customer table (for example, you will need to separate the 5-digit ZIP code from the ZIP+4 code). Once you have assigned as many fields as possible, click Next.

The screenshot shows the 'Community Coder v. 9.1.0.31' application window. The 'Specify Input Field Locations' dialog box is open, allowing users to map input fields from a customer file to specific address components. The 'Address' field is mapped to 'ADDRESS'. The 'City/State/ZIP Code' section has 'CITY' for the city, 'ST' for the state, and 'ZIP' for the ZIP code. There are five additional dropdown menus for address fields, all currently set to '- None Specified -'. The 'Company/Firm' field is also set to '- None Specified -'. A checkbox for 'Address fields should be appended and treated as one field' is unchecked. An 'Optional' section provides instructions on specifying a 'Geocode' field and a 'Geocode Match Level' (usually GEOLEVEL), both currently set to '- None Specified -'. The dialog includes a license expiration notice for 03/29/2008 and navigation buttons for 'Next >', '< Back', and 'Run'.

5. Select your desired processing options. For the purpose of this example just accept the default options as specified below and click Next.



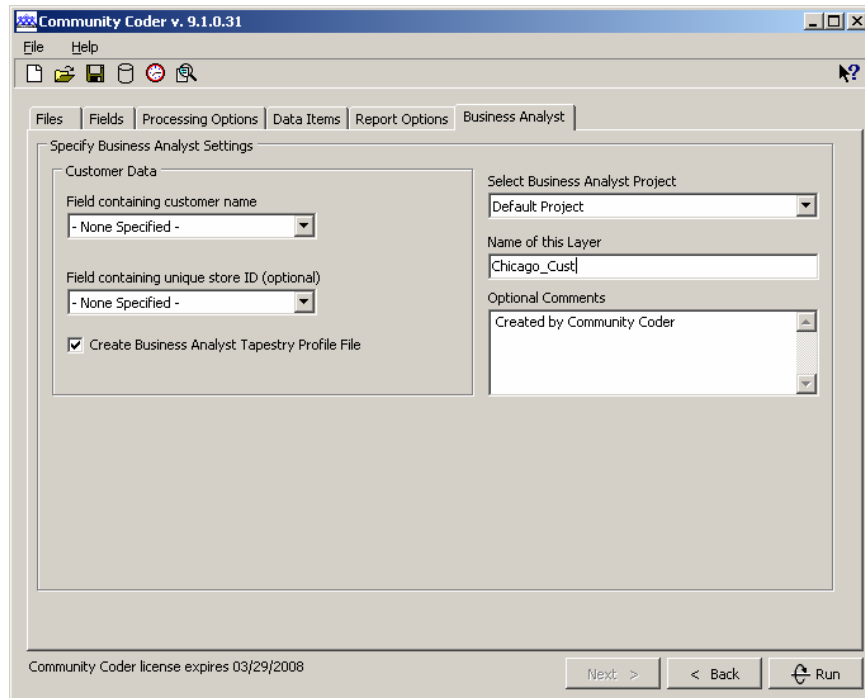
6. Select the data items that you would like appended to your input file. The default selected items are listed in the box on the right. To add additional items to be appended to your file, expand the *Available items* listing on the right and select the desired items to append and click the single right arrow button between the two windows. All selected items will be appended to the end of your original input file upon processing. For the purpose of this example, just leave the default *Selected Items* and click Next.



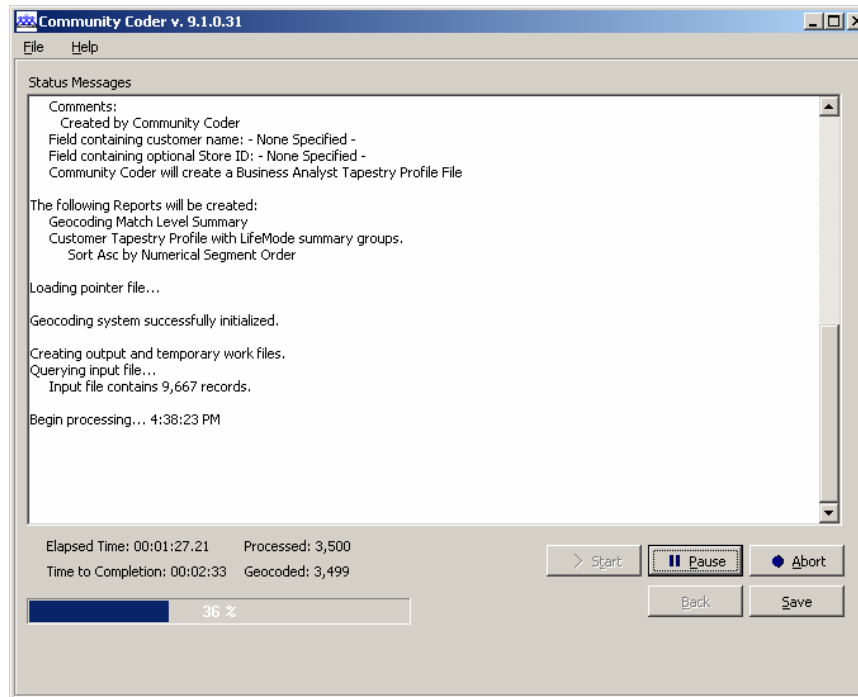
7. Select the reports that you wish to run during the geocoding process. Use the information tool available in the Community Coder software to learn more about the various reporting options available. For the purpose of this example select the *Geocoding Match Level Summary* and the *Customer Tapestry Profile* (using the default sort options) as specified below and click Next. These reports will be generated and stored in the directory/file that you specified on the *Files* tab earlier.

The screenshot shows the 'Community Coder v. 9.1.0.31' application window. The 'Report Options' tab is active. Under 'Select Reports', the following options are checked: 'Geocoding Match Level Summary' and 'Customer Tapestry Profile'. The 'Customer Tapestry Profile' is configured with 'Sort on: Numerical Segment Order' and 'Asc'. The 'Summary Group to be used:' is set to 'LifeMode'. There are also options for 'Create Tapestry CSV file' and 'Calculate Similarity Index for these Geographies' (States, Counties, ZIP Codes, CB5As). The 'Trade Area Analysis Report (.xls file type)' is also checked. Below this, the 'Trade Area Analysis Report Information' section includes fields for 'Name of Site', 'Description of Site', 'Location of Site (Required)', 'Latitude', and 'Longitude'. There are also dropdowns for 'Latitude Field (Optional)' (set to 'LATITUDE') and 'Longitude Field (Optional)' (set to 'LONGITUDE'). A 'Locate' button is present. At the bottom, there are 'Next >', '< Back', and 'Run' buttons. The license expiration date 'Community Coder license expires 03/29/2008' is displayed at the bottom left.

- Next select the Business Analyst processing options. Use the information tool available in the Community Coder software to learn more about the various Business Analyst processing options available. For the purpose of this example select the *Create Business Analyst Tapestry Profile File* as specified below and enter Chicago\_Cust under the *Name of this layer* and click Next. By selecting this option, Community Coder will automatically create a Business Analyst profile.



- Click the Run button to display the Status Message window which contains all the job specifications set previously and click Start to process the job. The screen will display status messages like the one below while the Community Coder software is processing the file and reports. The status bar at the bottom will update based on the percent of the file processed. The number of records processed and geocoded will be displayed above the bar.



10. Once 100% of the records are processed you will be prompted to select a base for your Customer Tapestry Profile. Every profile must have a base profile to compare against. The geography base you select here will be displayed on the Tapestry Profile report and will be used to calculate the penetration and indices on this report. The geography you select should be the geographic area from where you draw close to 100% of your customers. If your customers come from all over the United States then it would be best to select the United States as the base for your customer profile. For this example, select the Chicago-Naperville CBSA, because almost all customers in the sample file are from the Chicago-Naperville CBSA, and click OK.

Select Base for Customer Tapestry Profile

Select Geographic Level

- United States
- State
- County
- ZIP Code
- CBSA

Code	Area Name	[% of File] [Cumulative %]	
16980	Chicago-Naperville	(99.7)	(99.7)
46700	Vallejo-Fairfield, C	(0.0)	(99.8)
37900	Peoria, IL	(0.0)	(99.8)
38940	Pt St Lucie-Ft Pier	(0.0)	(99.8)
41180	St. Louis, MO-IL	(0.0)	(99.8)
16580	Champaign-Urbana, I	(0.0)	(99.8)
19340	Davenport-Moline	(0.0)	(99.9)

OK Save Help

Name of Custom Base: Custom Base

11. Upon completion, Community Coder will display the reports on screen in the default program associated with .doc files.

Chicago\_Cust.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Type a question for help

Coder Normal Arial 9 B I U

ESRI

### Geocoding Match Level Summary

---

File: C:\My Output Data\Projects\Default Project\CustLayers\Chicago\_Cust2\Chicago\_Cus{shp

Number of Records: 9,667

Match Description	Match Code	Number	Percent
Street Match or ZIP+4	S	9,609	99.4%
Dominant Tract in ZIP Code	Z	57	0.6%
One Tract in ZIP Code	T	1	0.0%
No Geocode	X	0	0.0%
		<b>9,667</b>	<b>100.0%</b>

---

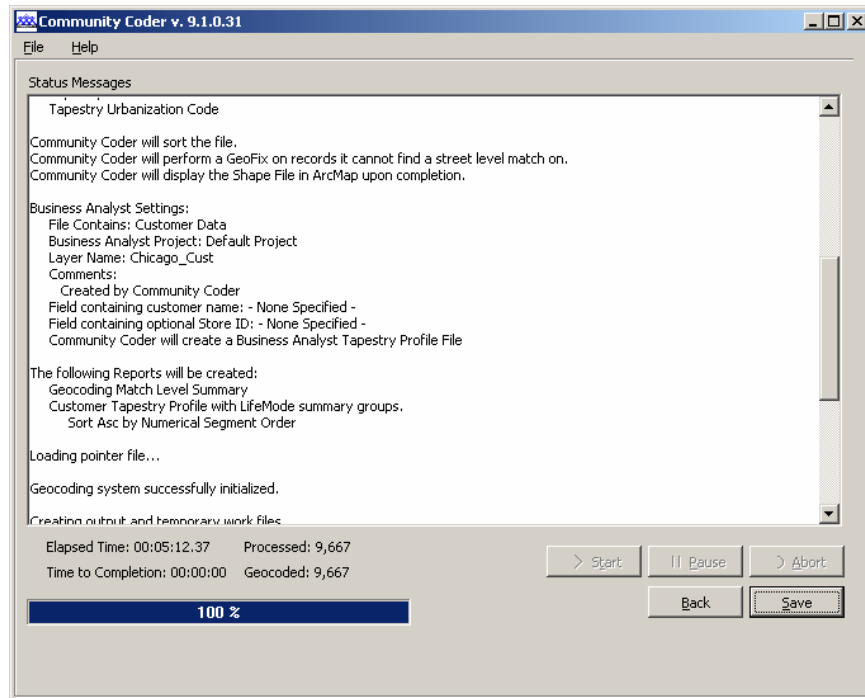
**Match Description**

ESRI assigns your customer records to one of four match levels. The best match level is Street Address or ZIP+4. If a record cannot be matched at the Street Address or ZIP+4 level, the Geo-Fix option can assign a census tract through a ZIP Code to census tract correspondence. The census tract with the largest population in the ZIP Code is appended to the record. This match is referred to as a Dominant Tract in ZIP Code (Z) match. If the ZIP Code is built from only one census tract, then the match code (T) denotes only one tract in the ZIP Code.

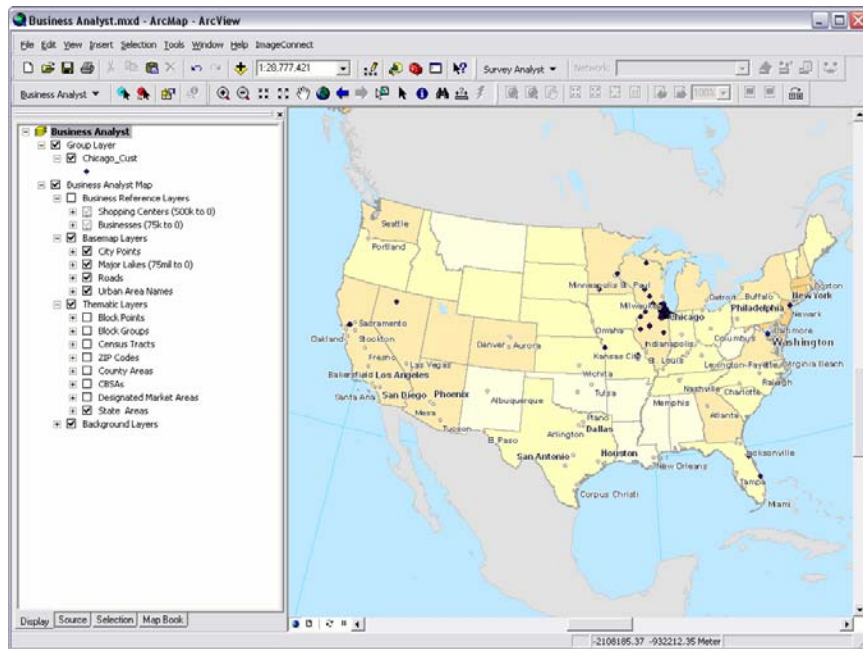
Page 3 Sec 2 3/9 At 2.2" Ln 5 Col 87 REC. TRK. EXT. OVR



You can save the job specifications by clicking the Save button.



12. A Business Analyst Customer Layer will be created and your customers will be displayed on your map.

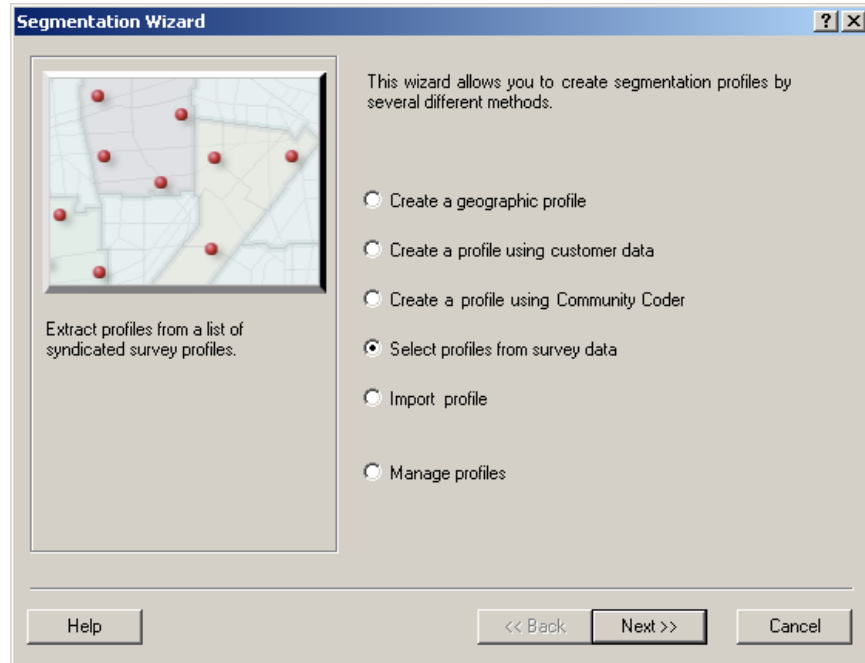


## Select profiles from survey data

The Business Analyst Segmentation Module includes at least two Tapestry coded survey data categories in addition to the base Media categories. The source of this survey data is Mediamark Research, Inc. (MRI). MRI conducts a survey that measures the demand for various products and services. Because MRI and ESRI can identify each survey respondent by Tapestry segment, we are able to create a profile of the customers who purchase or use the various products and services on the MRI survey. These MRI profiles can be used as surrogates for your own customer data in cases where customer address information is not available. Additionally, they can be used to compare a nationally weighted profile to your customer profile to identify segments where you are performing better or worse compared to the national survey data.

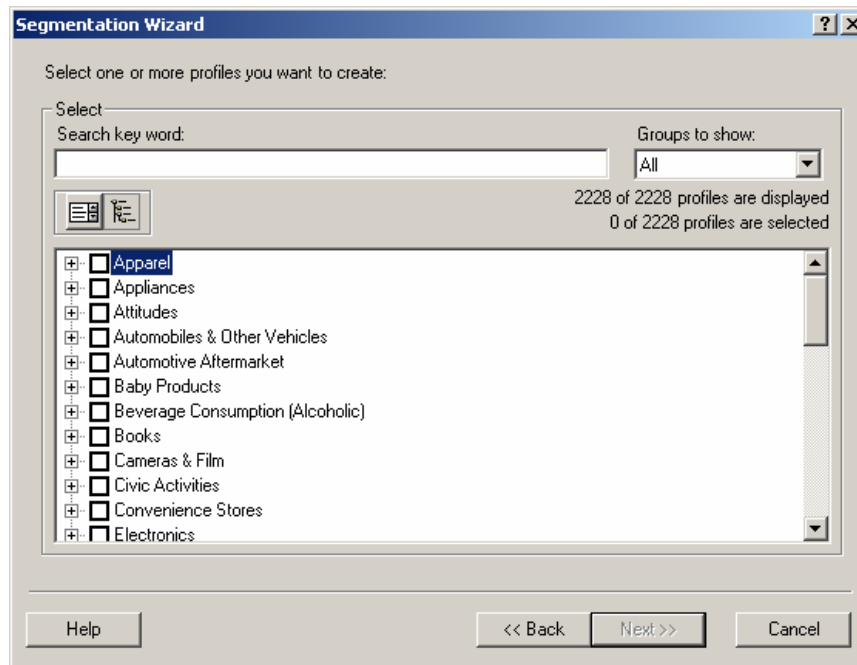
### Select profiles from survey data

1. Select Segmentation, Create Profiles from the Business Analyst Drop-down main menu
2. Choose *Select profiles from survey data* and click Next.

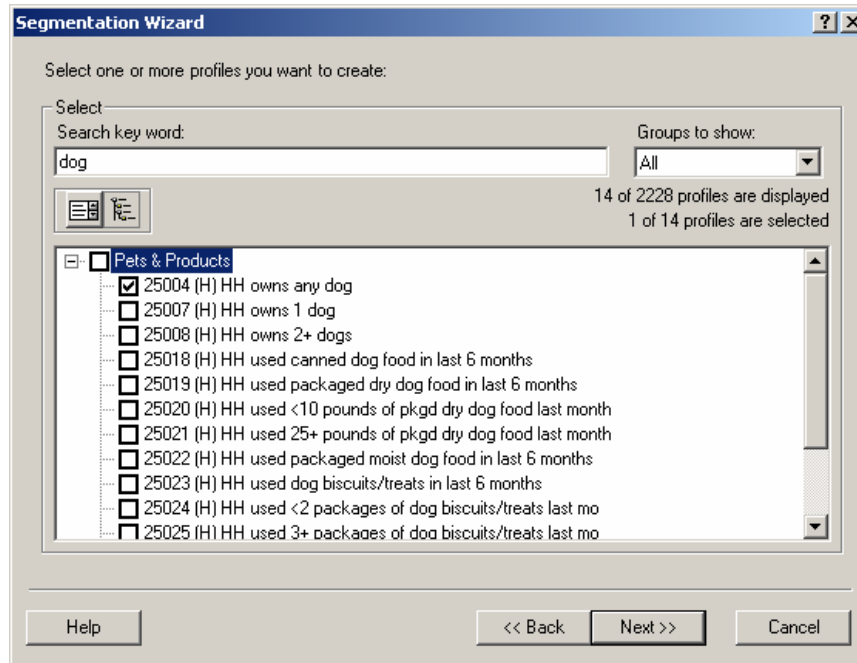


3. Select one or more profiles from survey data. The total number of survey based profiles available for selection and the total number of survey based profiles selected are displayed. A list of survey groups or categories is listed in a tree format in the main window. If you check the box next to the group or category name, then all profiles in that category will be selected. The individual profiles available under each category can be displayed by clicking on the + next to the category name to expand the tree. Or, if you prefer to display a listing of the individual survey profiles you can toggle between a tree view and a list view using the buttons above the profile selection window.

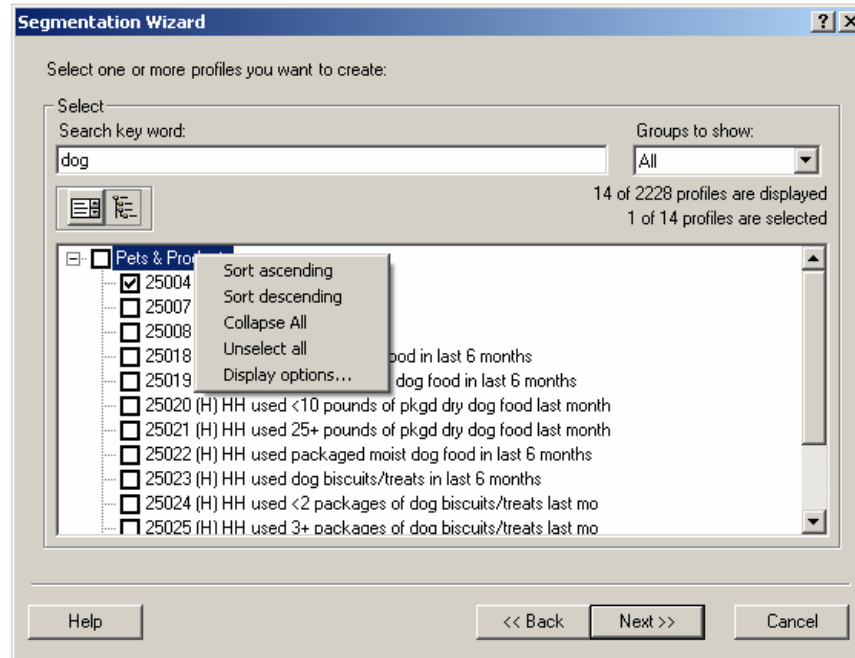
You can narrow the list of survey profiles by entering a string of characters in the Search key word box. If you want to only display one survey group in the window then you can choose that group using the *Groups to show* drop-down menu.



4. For example, if you are looking for a profile of households who own a dog you can enter “dog” into the *Search key word* box. Only survey categories that contain profiles with “dog” in their description will be displayed in the window. By clicking the + next to the Pets & Products category all profiles that meet the search criteria will be displayed. Information such as the numeric code and base indicator are provided for each survey profile. “H” indicates “household” and “A” indicates “adult population”. Also note that the number of profiles displayed has changed to 14 of 2228. Click on the box next to *HH owns any dog* to select this survey profile.



5. By clicking on your right mouse button inside the selection window you can choose to change the sort order of the profiles, collapse all the items so that only the category is displayed, unselect all selected profiles or set the display options. In display options, you can choose whether the product code is displayed or not, whether the profile base letter is displayed or not, and whether the sort method is based on the product code for profile description. Once you have set these preferences to your liking, click Next.



6. A summary of the survey profiles to be created are listed along with their unique product code, whether the profile is household based (H) or adult based (A), and the survey profile question. Check or uncheck any profiles listed or click the Select All or Clear All to select or deselect all survey profiles listed. Once all the survey profiles you would like to create are checked, click Finish to process.

The image shows a software dialog box titled "Segmentation Wizard". It contains a table with the following data:

Create profile	PRODCODE	BASE	Survey profile question
<input checked="" type="checkbox"/>	25004	H	HH owns any dog

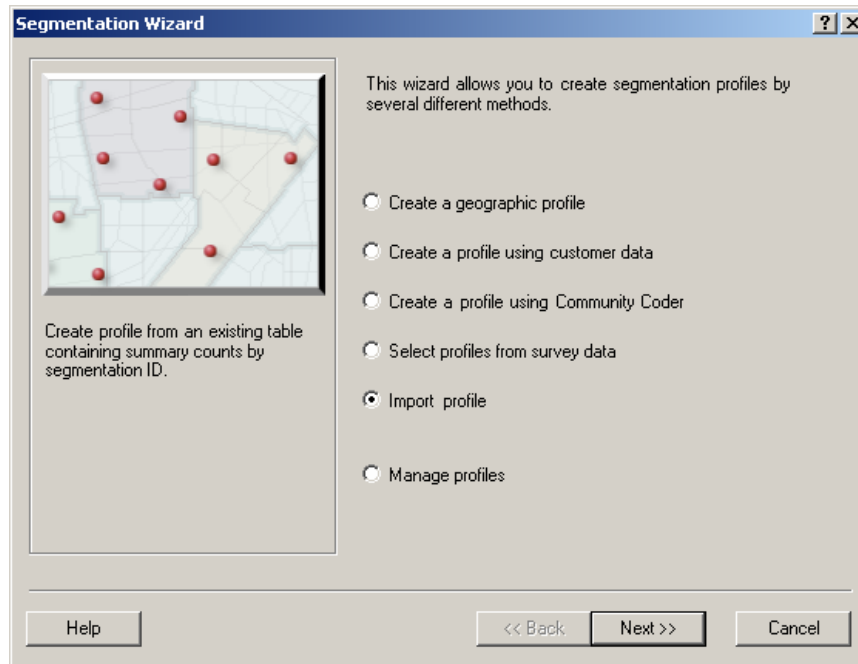
Below the table are two buttons: "Select All" and "Clear All". At the bottom of the dialog box are three buttons: "Help", "<< Back", and "Finish", followed by a "Cancel" button.

## Import a profile

Use this option if you already have a table that contains your customer data summarized across all the Tapestry segments or if you would like to import a profile created by another Business Analyst user. This table must include a field that contains the Tapestry codes from 1 to 66 and a field with the associated count of customers who fall into each of the 66 Tapestry segments.

### Import a profile

1. Select Segmentation, Create Profiles from the Business Analyst Drop-down main menu
2. Chose *Import profile* and click Next.

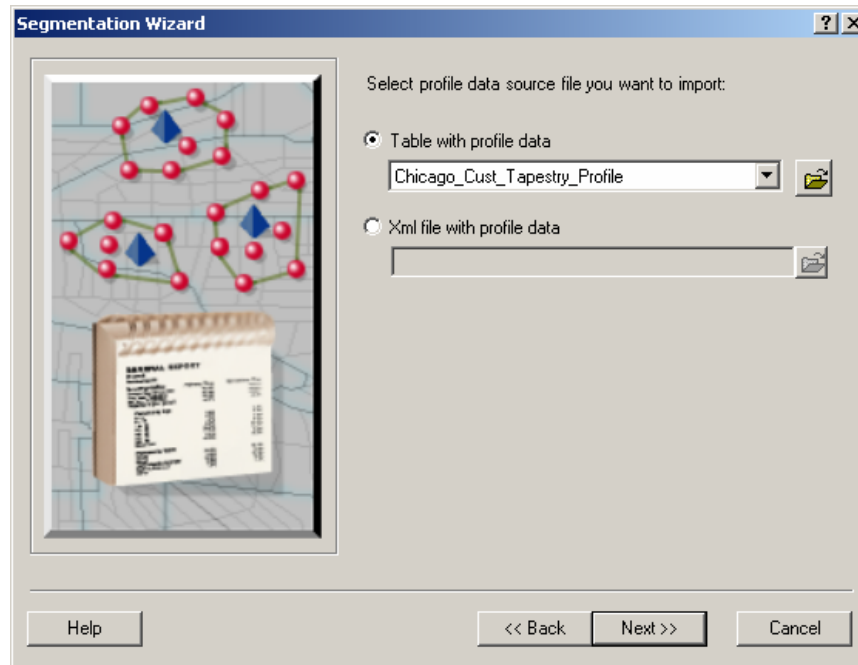




There are two options for importing profile data. One option is to import a table that contains your customer data or survey data summarized by Tapestry segments. The other option is to import an .xml file with profile data that was created using Business Analyst.

### *Option 1 – Table with profile data*

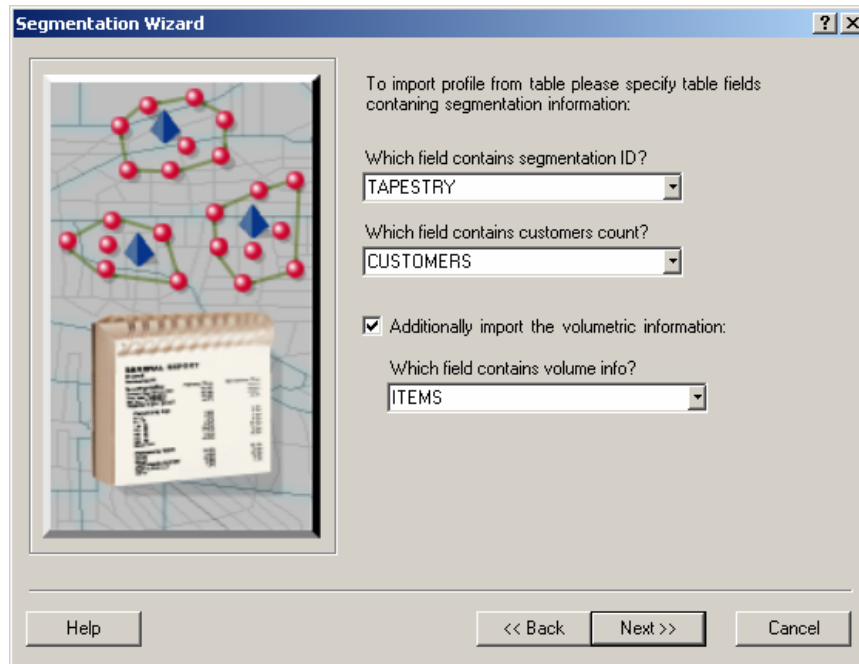
Use this option if you already have a table that contains your customer data summarized across all the Tapestry segments. Select the *Table with profile data* option and select the table with your customer data from the drop-down box if the table has been added to the Business Analyst display or click the folder button to browse to the table and click Next.



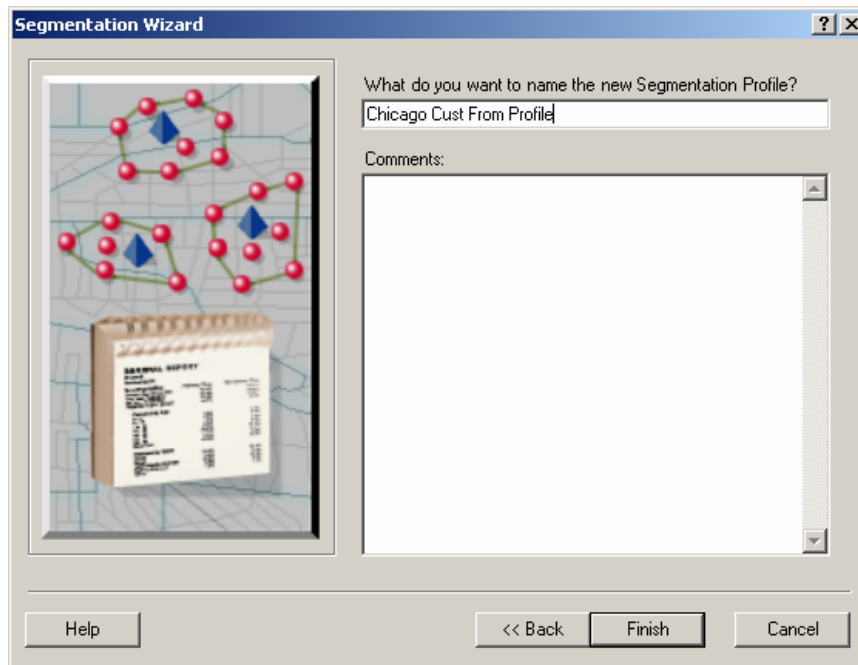
Select the field in your table from the drop-down list of available fields that includes the Segmentation ID. In this example, this is the field named TAPESTRY. It contains the numbers 1 to 66 that represent each Tapestry segment.

Now select the field in your table from the drop-down list of available fields that includes the count of customers associated with each Tapestry segment. In this example, the field named is CUSTOMERS. A customer profile can be created with volume information.

If the table that contains your customer information includes a field with average volume information for each of the 66 Tapestry segments (such as average number of visits, average number of items purchased, average dollar amount spent, etc.) you can specify that information by selecting the *Additionally import the volume information* check box and selecting the volume field from your customer layer using the drop-down menu just below the check box. This drop-down menu also has an option to filter the list of available fields by entering a string of characters in the *Filter* field with the option to check the *Match case* option to make the filter case sensitive. After you have filled in the applicable fields, click Next.



Enter a name for your new customer profile and enter any optional comments and then click Finish.



A summarization of your customer data by Tapestry Segment will be displayed and a Business Analyst customer profile will be created.

Segment ID	Segment Name	Count	Weight	Volume Info
1	Top Rung	5	0.056	4
2	Suburban Splendor	10	0.042	3
3	Connoisseurs	13	0.111	8
4	Boomburbs	6	0.028	2
5	Wealthy Seaboard Suburbs	82	0.347	25
6	Sophisticated Squires	38	0.125	9
7	Exurbanites	15	0.125	9
8	Laptops and Lattes	44	0.319	23
9	Urban Chic	10	0.111	8
10	Pleasant-Ville	317	1.125	81
11	Pacific Heights	0	0	0
12	Up and Coming Families	9	0.042	3
13	In Style	27	0.111	8
14	Prosperous Empty Nesters	81	0.806	58
15	Silver and Gold	1	0.042	3
16	Enterprising Professionals	5	0.028	2
17	Green Acres	4	0.028	2
18	Cozy and Comfortable	648	2.069	149
19	Milk and Cookies	95	0.847	61
20	City Lights	199	1.208	87
21	Urban Villages	583	4.056	292

Buttons: Help, << Back, Finish, Cancel

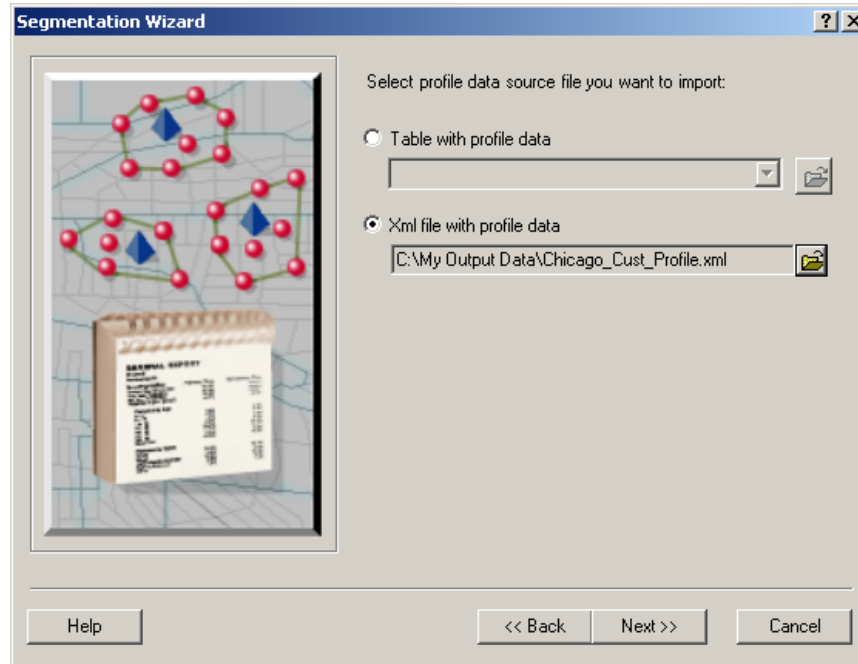
*Count* – the count of customers in a Tapestry segment

*Weight* – *Weight* is calculated by multiplying the *Volume Info* for each segment by 100 and dividing by the total volume for all segments.

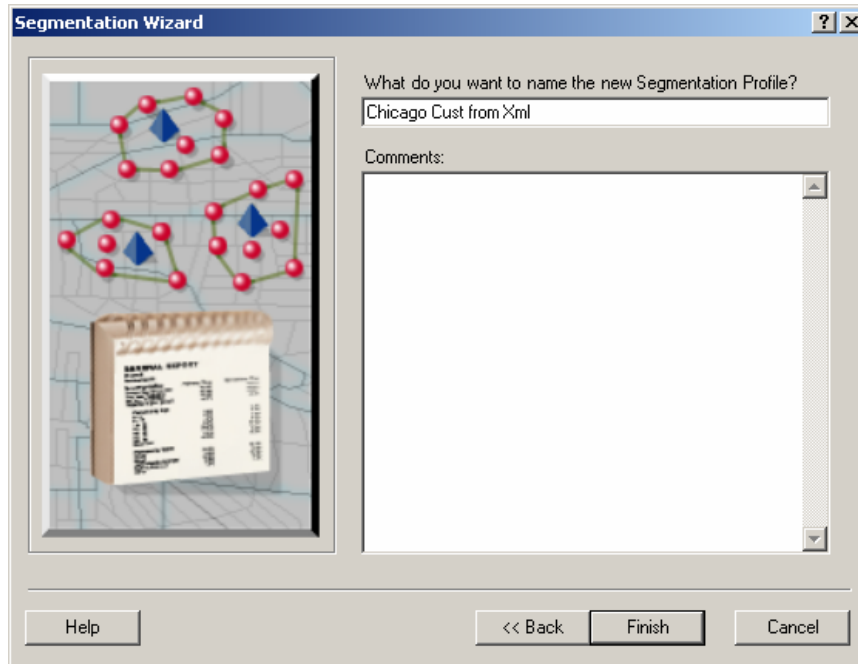
*Volume Info* – volume represents customer information such as number of visits, items purchased, dollar amount spent, etc. *Volume Info* is calculated by summing the volume values on each customer record by segment and dividing by 100. *Volume Info* is the same as *Count* if you do not set an optional volume field.

### Option 2 – Xml file with profile data

Use this option if you would like to import a profile created by another Business Analyst user. Select the *Xml file with profile data* option and click the folder button to browse to the Xml file that you would like to import and click Next.



Enter a name for your new customer profile and enter any optional comments and then click Finish. The profile will be imported and available for use in Business Analyst. You will not receive a summary screen with this option.

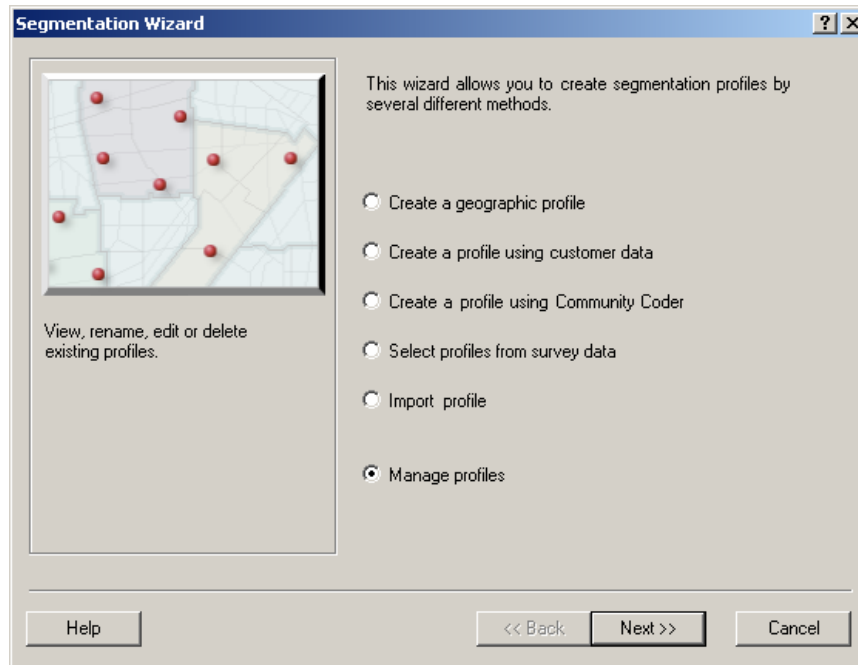


## Manage profiles

Use this option to manage the customer, geographic, or survey profiles you created in Business Analyst. You can view, modify, delete, and rename existing profiles.

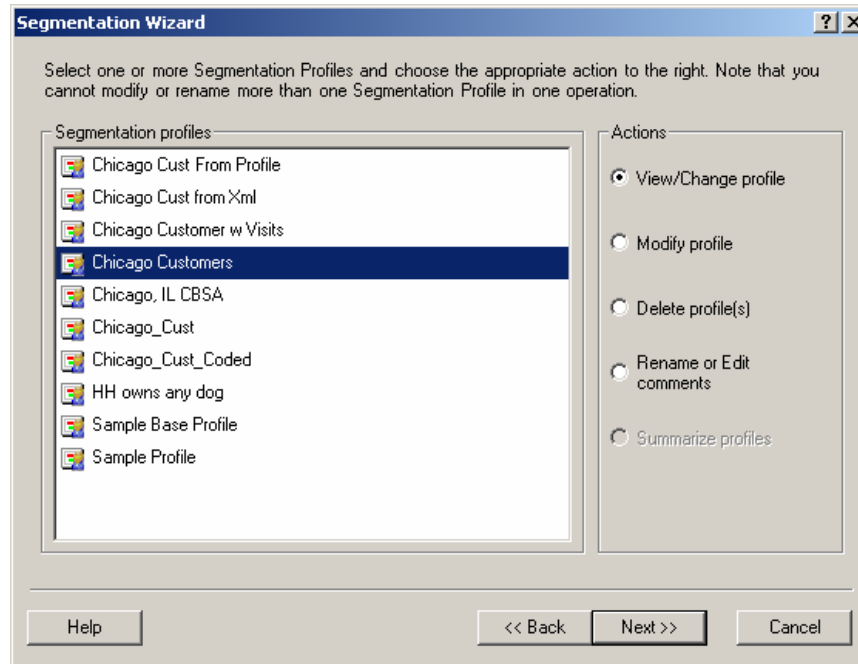
### Manage profiles

1. Select Segmentation, Create Profiles from the Business Analyst Drop-down main menu
2. Chose *Manage profiles* and click Next.



## View/Change profile

1. To view or manually change the customer count or volume for a Tapestry segment in the profile, just select the profile you wish to view or change from the list of existing profiles and select *View/Change profile* and click Next.





- A summary screen will display the Segment ID, Segment Name, the associated Customer Count, and the Volume Info and associated Weight. The *Weight* is calculated automatically and is the percentage of the total volume per segment for the customer profile. You can view the information contained in the profile and you can sort on any column by clicking your right mouse button on the column header. You can also manually edit the *Count* field values or the *Volume Info* values on this screen. If you edit the *Volume* for a segment, the *Weight* for all segments will automatically adjust based on your change. Click Finish to save any changes you made to the profile.

Segment ID	Segment Name	Count	Weight	Volume Info
1	Top Rung	5	0.056	4
2	Suburban Splendor	10	0.042	3
3	Connoisseurs	13	0.111	8
4	Boomburbs	6	0.028	2
5	Wealthy Seaboard Suburbs	82	0.347	25
6	Sophisticated Squires	38	0.125	9
7	Exurbanites	15	0.125	9
8	Laptops and Lattes	44	0.319	23
9	Urban Chic	10	0.111	8
10	Pleasant-Ville	317	1.125	81
11	Pacific Heights	0	0	0
12	Up and Coming Families	9	0.042	3
13	In Style	27	0.111	8
14	Prosperous Empty Nesters	81	0.806	58
15	Silver and Gold	1	0.042	3
16	Enterprising Professionals	5	0.028	2
17	Green Acres	4	0.028	2
18	Cozy and Comfortable	648	2.069	149
19	Milk and Cookies	95	0.847	61
20	City Lights	199	1.208	87
21	Urban Villages	583	4.056	292

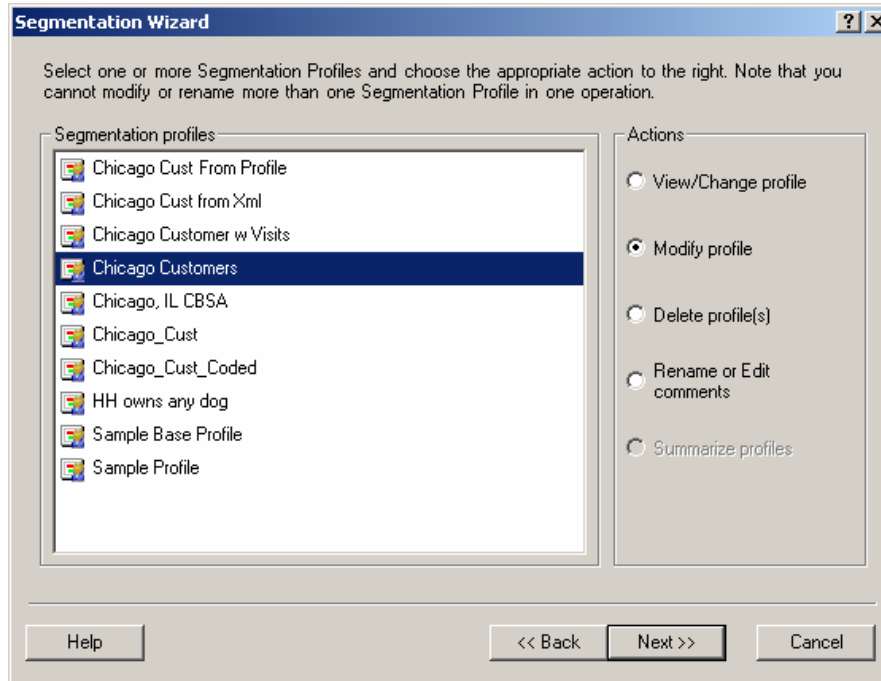
*Count* – the count of customers in a Tapestry segment

*Weight* – *Weight* is calculated by multiplying the *Volume Info* for each segment by 100 and dividing by the total volume for all segments.

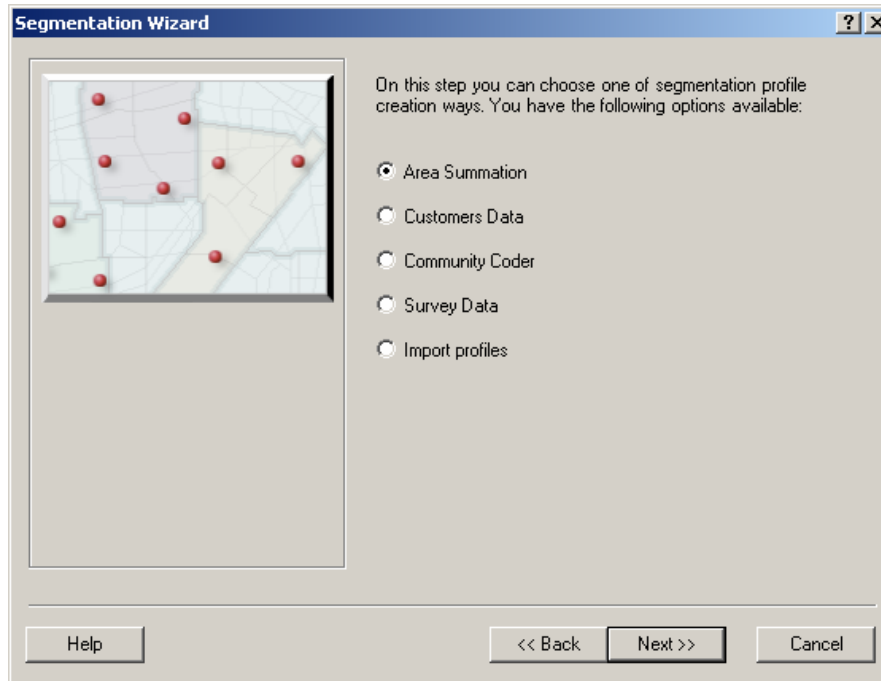
*Volume Info* – volume represents customer information such as number of visits, items purchased, dollar amount spent, etc. *Volume Info* is calculated by summing the volume values on each customer record by segment and dividing by 100. *Volume Info* is the same as *Count* if you do not set an optional volume field.

## Modify profile

1. Use this option to modify an existing profile by overwriting it with a new profile. Select the profile you wish to overwrite, select *Modify profile* and click Next.

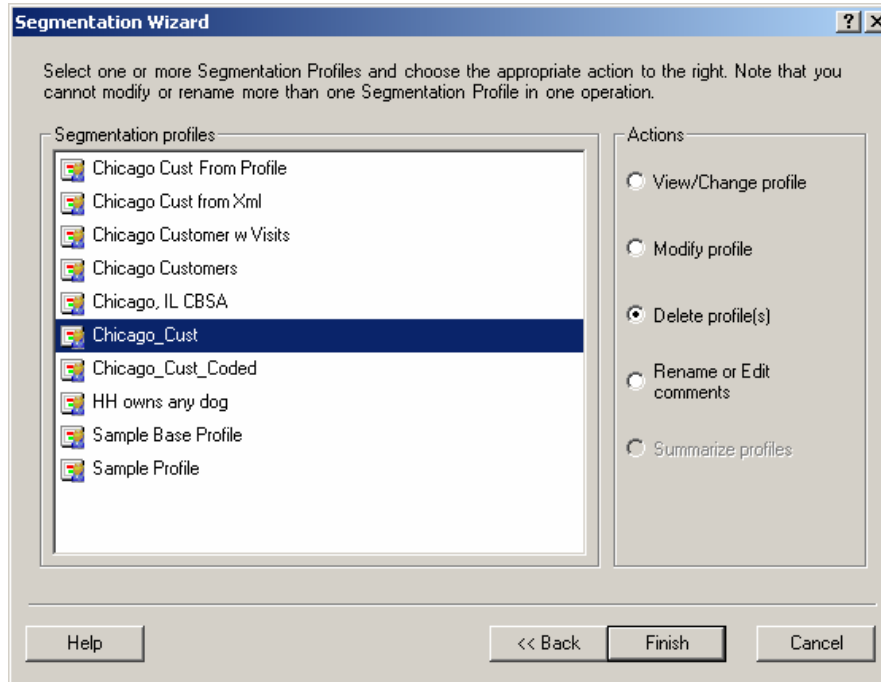


2. Select the option you would like to use to overwrite the existing profile you selected on the previous screen. Use *Area Summation* to create a geographic profile, use *Customers Data* to create a profile using customer data, use *Community Coder* to create a profile using Community Coder, use *Survey Data* to select a profile from survey data, use *Import Profiles* to create a profile by importing customer data that has already been summarized by Tapestry segments. The steps for each of these profile creation methods have already been documented under the *Create Profiles* section of this booklet.

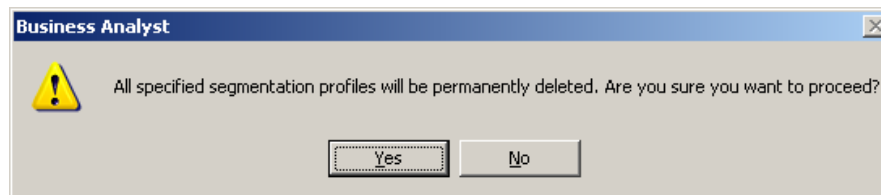


## Delete profile

1. Use this option to delete an existing profile. Select the profile or profiles you wish to delete by highlighting them from the list box. Select *Delete profile(s)* and click Finish. This will remove them permanently.

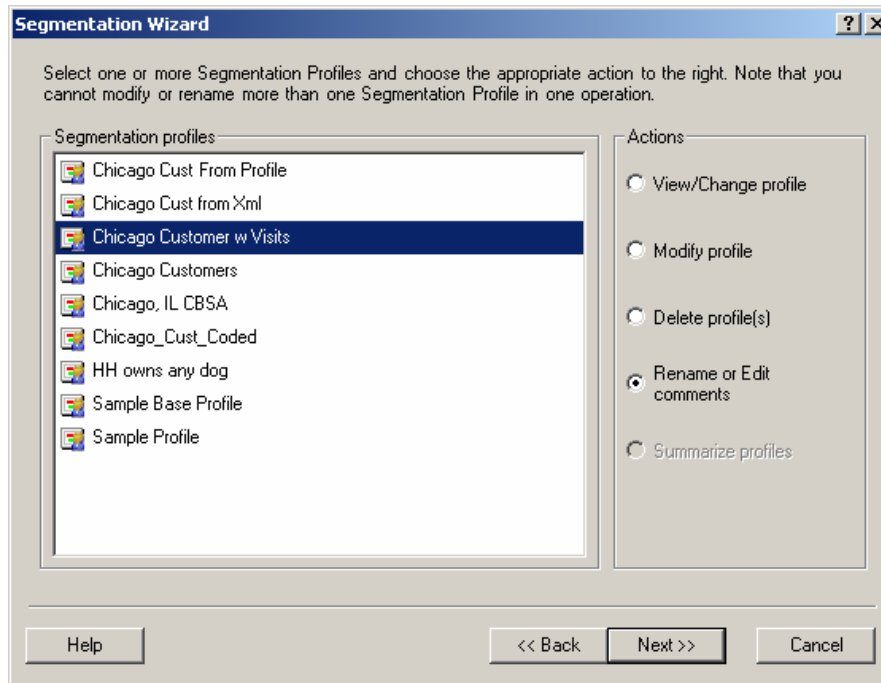


2. You will receive the warning message below. Click yes, to delete the profile(s).

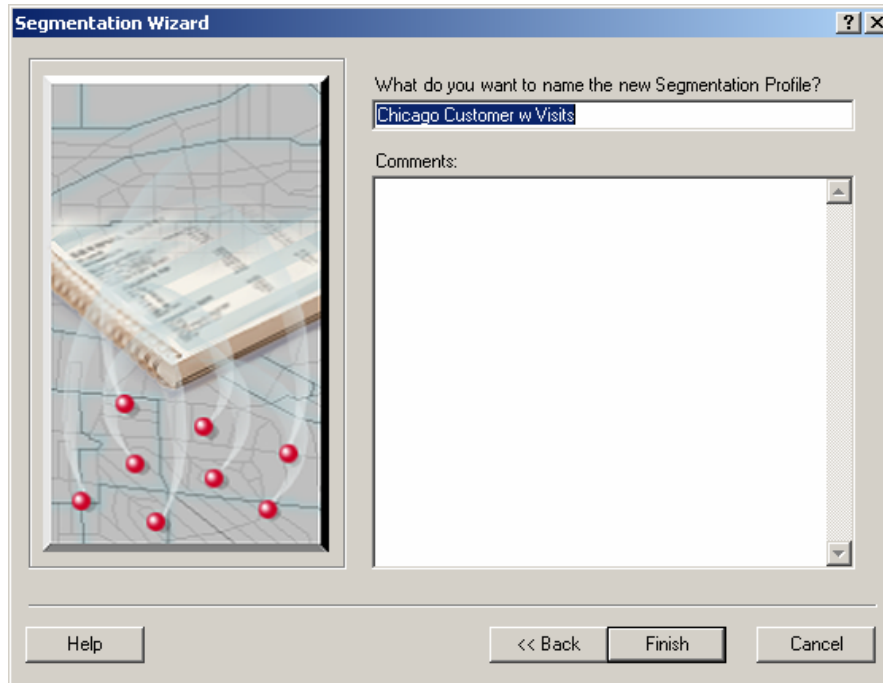


## Rename or Edit comments

1. Use this option to rename an existing profile or to modify the comments associated with an existing profile. Select the profile you wish to rename or edit comments by highlighting it from the list box. Select *Rename or Edit comments* and click Next.



2. Edit the profile name or comments as desired and click Finish.



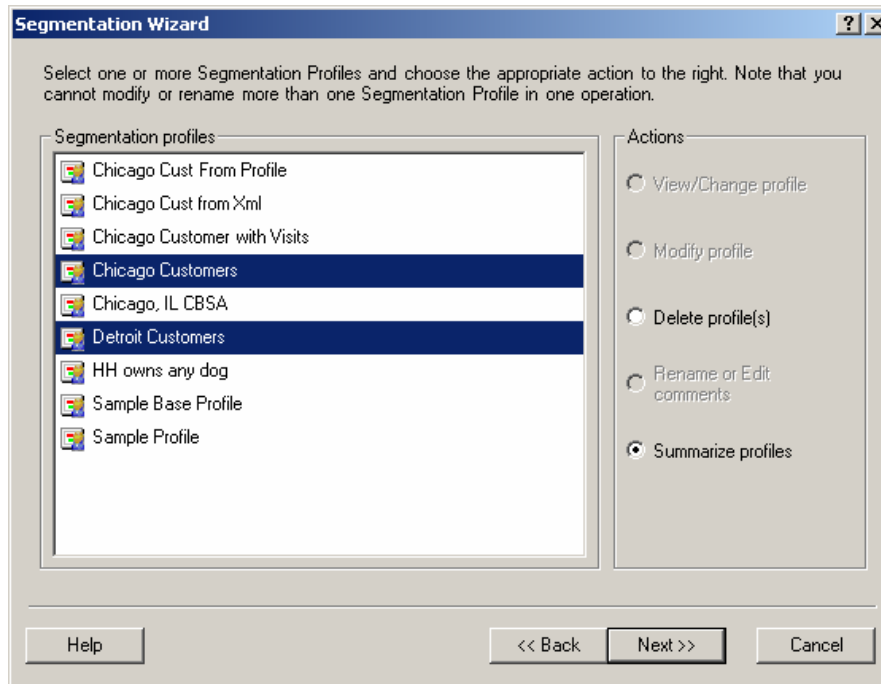
## Summarize profiles

Use this option to add together two or more existing profiles. This feature adds together the counts and volumes for each segment across all selected profiles. You might do this to add west region customers with east region customers to create a profile of all customers, but it would not make sense to necessarily do for unrelated profiles. You **WOULD NOT** do this to add *Chicago Customers* and *HH owns any dog* for example, since these two profiles are not related and have very different geographic coverage.

Also, if you add two profiles such as *Customers who have 3 or more visits* and *Customers who have spent more than \$100* you **WILL NOT** end up with a profile of *Customers who have 3 or more visits AND spent more than \$100*. This option simply adds together the number of customers (and volume) in segment 1 in the first profile to the number of customers in the second profile to come up with the summarized number of customers (and volume) in segment 1, and repeats this process for all segments. Thus, you end up with a profile of *Customers who had more than 3 visits OR spent more than \$100* and your profile double counts any customer who did both.

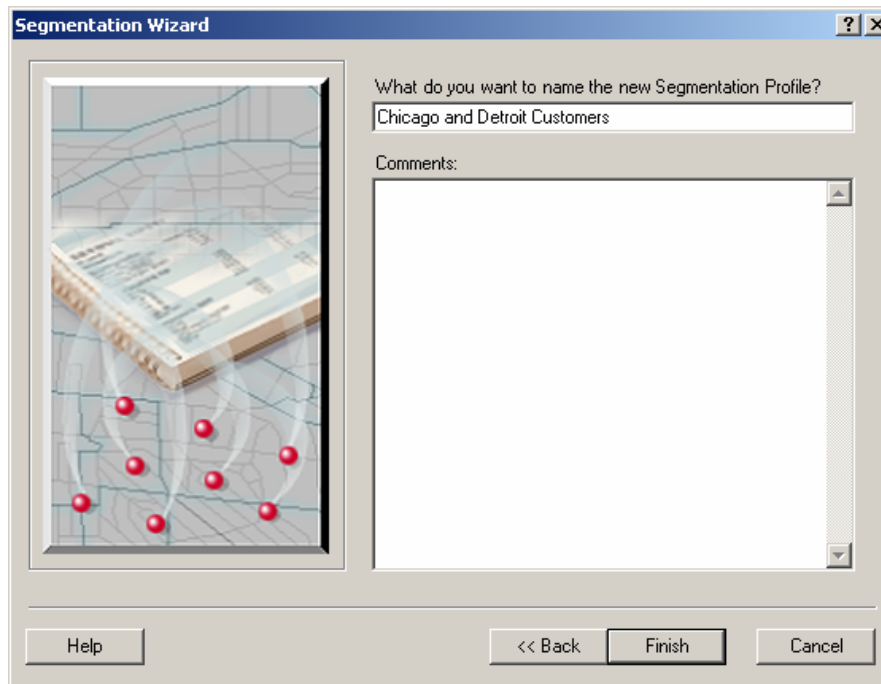
To create a profile of *Customers who really visited more than 3 times AND spent more than \$100* you will need to go back to your customer file and create a new table with just the customers who meet both criteria and create a new profile from that table.

1. Select the profiles you would like to summarize by either selecting an existing profile and clicking your Shift key and selecting a group of profiles in a row or clicking the Ctrl key to select any profiles in the list box. The *Summarize profiles* option does not become available until at least two profiles have been selected. Once you have selected all the existing profiles you would like to summarize, select *Summarize profiles* and click Next.





2. Enter a name for your new customer profile and enter any optional comments and then click Finish.



3. A summary screen will display the Segment ID, Segment Name, the associated Customer Count, the Volume Info, and associated Weight for the summarized profiles selected. Click Finish to close this screen.

Segment ID	Segment Name	Count	Weight	Volume Info
1	Top Rung	5	0	0
2	Suburban Splendor	10	0	0
3	Connoisseurs	13	0	0
4	Boomburbs	6	0	0
5	Wealthy Seaboard Suburbs	82	0	0
6	Sophisticated Squires	38	0	0
7	Exurbanites	15	0	0
8	Laptops and Lattes	44	0	0
9	Urban Chic	10	0	0
10	Pleasant-ville	634	1.942	5684
11	Pacific Heights	0	0	0
12	Up and Coming Families	18	0.040	118
13	In Style	54	0.129	378
14	Prosperous Empty Nesters	162	0.437	1279
15	Silver and Gold	2	0.005	16
16	Enterprising Professionals	10	0.011	32
17	Green Acres	8	0.071	208
18	Cozy and Comfortable	1296	4.124	12071
19	Milk and Cookies	190	0.515	1508
20	City Lights	398	1.206	3529
21	Urban Villages	1166	3.250	9513

Buttons: Help, << Back, Finish, Cancel

*Count* – the count of customers in a Tapestry segment

*Weight* – *Weight* is calculated by multiplying the *Volume Info* for each segment by 100 and dividing by the total volume for all segments.

*Volume Info* – volume represents customer information such as number of visits, items purchased, dollar amount spent, etc. *Volume Info* is calculated by summing the volume values on each customer record by segment and dividing by 100. *Volume Info* is the same as *Count* if you do not set an optional volume field.

## Chapter 3 – Create Target Groups

### IN THIS CHAPTER

- Create target group from list 60
- Create target group from chart 66
- Manage target groups 78

Now that we have created customer profiles, the next step is to use these profiles to identify the segments who are your best customers so that we can better understand them and find more customers like them. In Business Analyst we do this by creating target groups of segments that can then be used in the reports, maps, and charts to understand more about these target groups and to analyze markets using these target groups.

Target groups are segments that are selected and grouped together because you would like to target these segments for further analysis. Usually the segments in a target group are selected based on similarities these segments share. Two examples of target groups are the Tapestry LifeMode Groups and the Tapestry Urbanization Groups. ESRI combined all 65 segments into 12 LifeMode groups based on lifestyle and life stage composition. For example, Group L5 Senior Styles includes the nine segments with a high presence of seniors. ESRI also combined all 65 segments into 11 Urbanization Groups based on geographic and physical features such as population density, size of city, location in or outside a metropolitan area, and whether or not it is part of the economic and social center of a metropolitan area. For example, Group U1: Principal Urban Centers I includes eight segments that are mainly in densely settled cities within major metropolitan areas.

The best way to create target groups is to identify target segments based on your customer profile. By using the Tapestry customer profiles created in the previous section, we are able to identify your target customers using a combination of two factors: Index and Percent of Customers. These two factors, in different combinations, can define your Core, Developmental, and Niche target groups.

Segments with a high percentage of your customer base are indicators of your Core Segments. Core Segments are the segments that not only make up a large percentage of your customer base, but also have an above average index, indicating likelihood to be a customer. Customers in this segment make up a larger percentage of your customer base than the percentage that they make up of the market area. These segments represent loyalty and good opportunity.

Developmental segments are the segments that make up a significant percent of your customers and of the market area but do not have an above average index. Developmental segments are important because they represent a significant portion of your customers but also represent areas with households that have not yet been reached. They represent potential for loyal customers.

Niche segments are the segments that do not make up a significant percent of your customers but do have an above average index. Households in these segments are very likely to be good customers but they do not make up a large percent of your current customer base. Niche segments represent opportunities when exploring new market areas for expansion and growth.

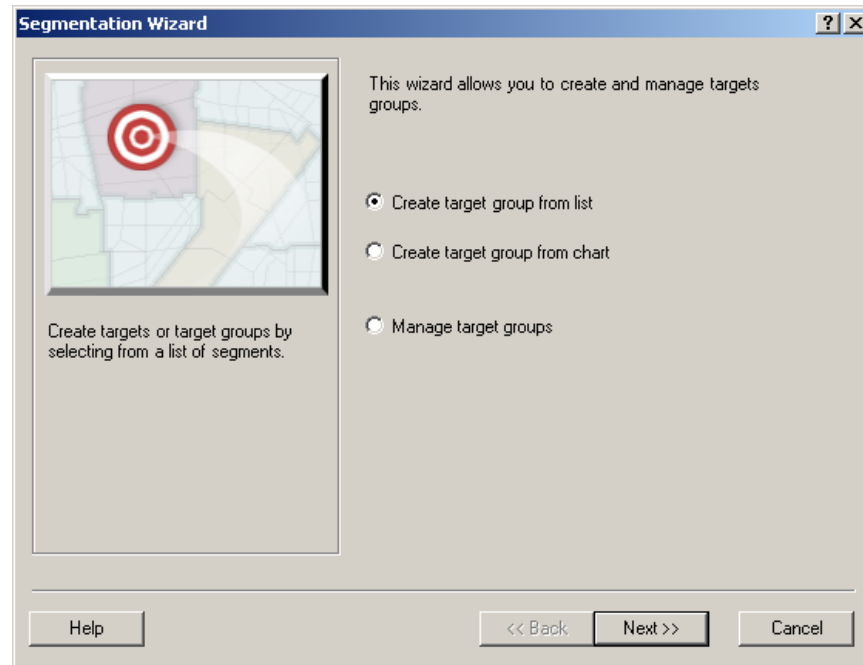
Using the *Create target groups* you can identify and create target groups based on your customer profile that can be used in the reporting and mapping section of the Business Analyst Segmentation Module to find and target other geographic areas that have a high concentration of your target segments.

## ***Create target group from list***

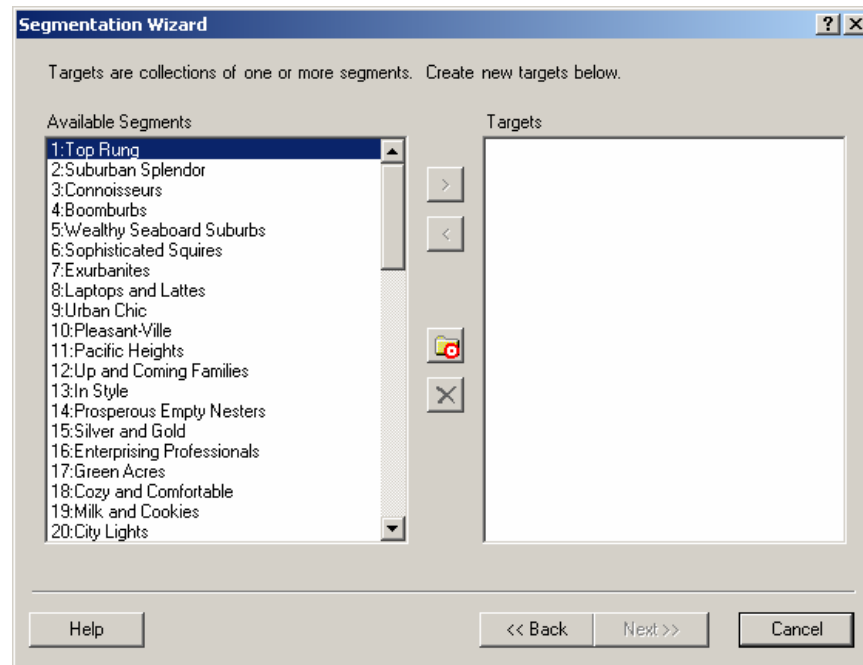
Select this option to create target groups from a list of segments. Use this option if you already know which segments you want to add to create your target groups.

### Create target group from list

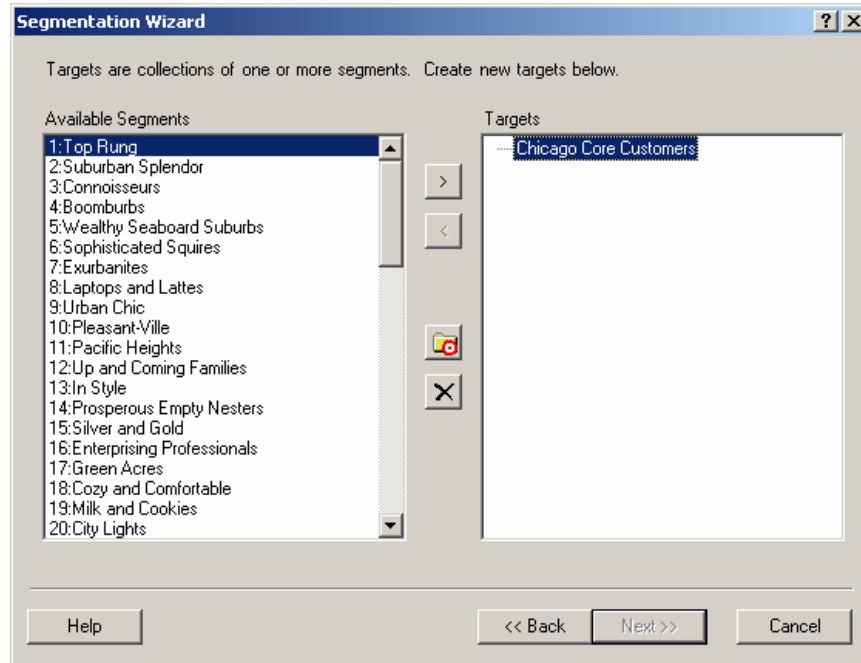
1. Select Segmentation, Create target groups from the Business Analyst Drop-down main menu.
2. Chose *Create target group from list* and click Next.



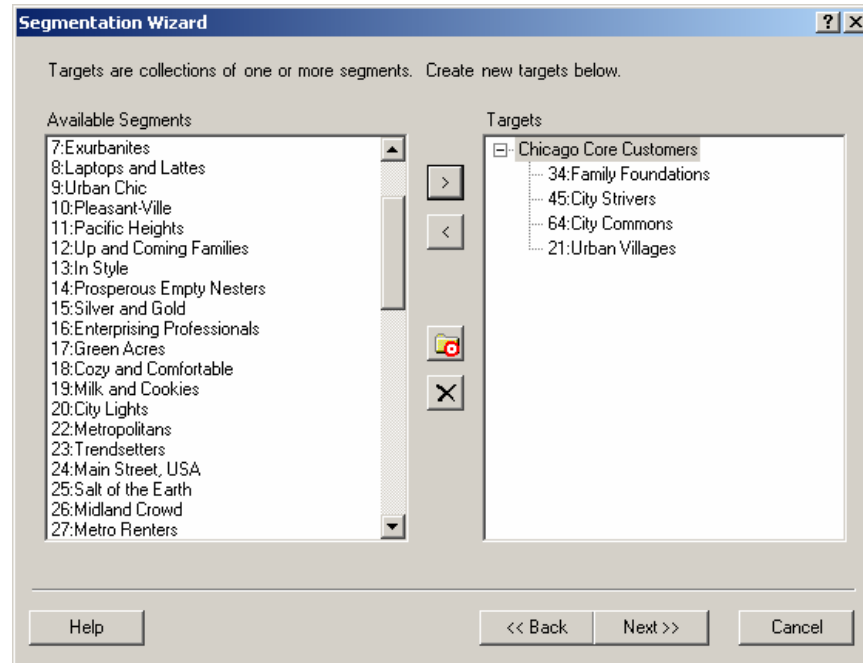
3. Click the button with the folder and a target on it to create your new target group.



4. Name your new target group. Now that you have created a new target group the right arrow can be used to add the desired segments to your new group.

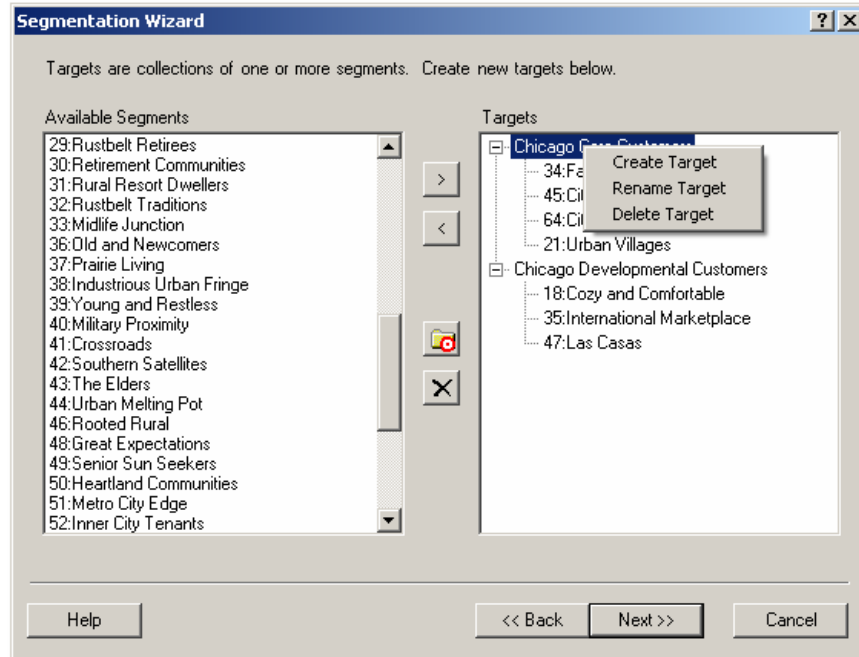


5. Select the segments you would like to add from the window on the left, either one at a time or in a group, by using your Shift or Ctrl key to select several segments and click the right arrow key. The segments you selected will now be listed under your new Target Group in the window on the right and will be removed from the available list of segments in the window on the left. To deselect segments, highlight the segment or segments in the window on the right and click the left arrow button to move them back to the available segments list. As you can see, you can only assign each segment to a single target group. You can create another target group by clicking the folder with a target button again.

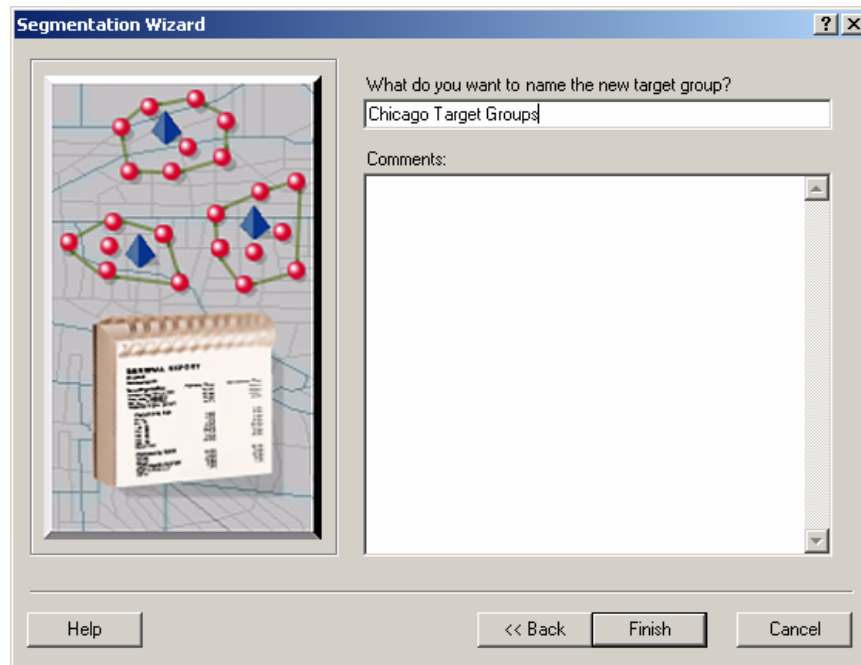




6. You can delete target groups by highlighting the group name in window on the right and clicking the button with an X on it. You can also delete, rename, or create target groups by right clicking on the target group in the box on the right. Once you have created the groups as desired, click Next.



7. Enter a name for your new target group(s) and enter any optional comments and then click Finish.



## **Create target group from chart**

Select this option to create target groups based on your customer profile and a chart that plots the segments based on their customer percent composition and their index. Use this option to identify your Core, Developmental, and Niche target groups based on an existing customer profile you have created using *Create Profiles* in Business Analyst.

To create target groups using this option, you will need to select an existing customer or survey profile that will be used to calculate the percent composition for each segment. The percent composition for a segment is calculated by taking the number of customers who are in the segment and dividing it by the total number of customers in the overall customer profile being used.

You will also need to select a base profile that will be used to calculate the index for each segment. In most cases, the base profile you select should be the geographic area from where you draw close to 100% of your customers. If your customers come from all over the United States then it would be best to select the United States as the base for your customer profile. The United States base should also be used for any survey profiles since the survey profiles are all nationally based. The index for a segment is calculated by dividing the segment's percent composition in the customer profile by the same segment's percent composition in the base profile and multiplying by 100. An index of 100 is average because the percent composition of the customer profile for that segment is exactly the same as the percent composition of the base profile for that segment. A segment with an index of 250 means that the customers in this segment are 2.5 times more likely to be in the customer profile than they are to be in the base profile. Segments with above average indices are performing better than expected based on the pool of customers from which they are being drawn.

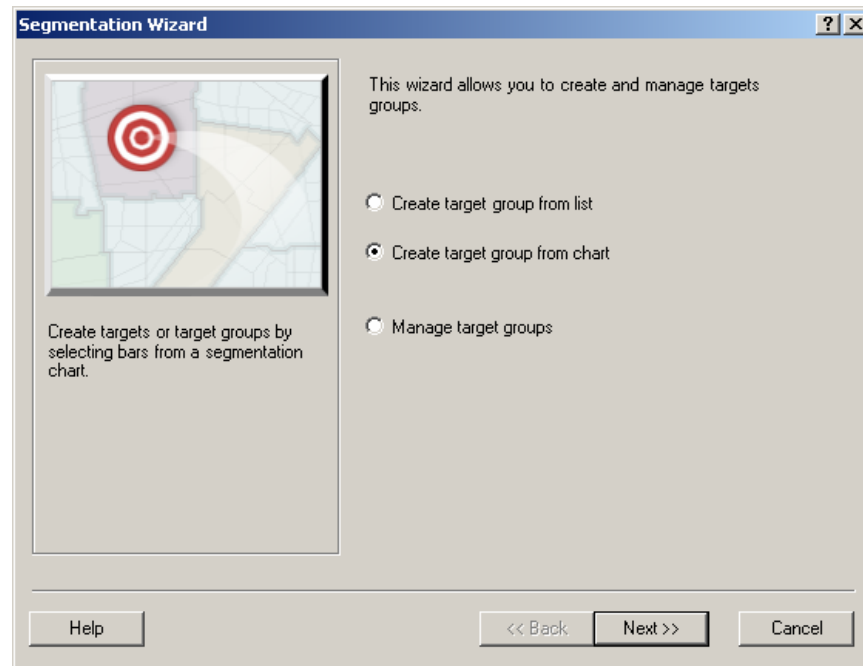
There are three chart options that can be used to create target groups. The first chart type is the *Profile comparison bar chart*. This chart displays all 66 Tapestry segments as bars on a chart, where the length of each bar varies based on the value of the customer profile index for each segment and the width of the bar varies based on percent penetration of the customer profile for each segment. The center of the bar chart is always set to 100 since an index of 100 is average. Segments with indices that are greater than 100 are displayed to the right of center and segments with indices below average are displayed to the left of center on the bar chart. By selecting the segments to the right of center with longer, thicker bars, you will be selecting segments that have relatively higher indices and higher penetration into the market. The second chart type is a *Game plan chart*. The *Game plan chart* displays all 66 Tapestry segments as a point on an x y chart where the y axis value represents the index of each segment and the x axis value represents the percent composition of the segment. This chart is divided into quadrants where the default center line values are automatically set based on the values in the chart.

By manually adjusting the center line values on this chart you can adjust which segments fall into each of the four quadrants on the chart. Use this chart to easily identify and select Core, Developmental, and Niche customers based on where they fall in the chart. The last chart type option is a *Trendline chart*. The *Trendline chart* is exactly the same as the *Profile comparison bar chart* but also allows you to display trend lines for up to 4 additional profiles on top of the bar chart. Use this option if you have selected more than one profile to use in determining which segments to add to your target groups.

These three chart options provide an easy way for you to interpret the data in your customer profile and help you select the appropriate segments to add to your target groups.

### Create target group from chart

1. Select Segmentation, Create target groups from the Business Analyst Drop-down main menu
2. Chose *Create target group from chart* and click Next.

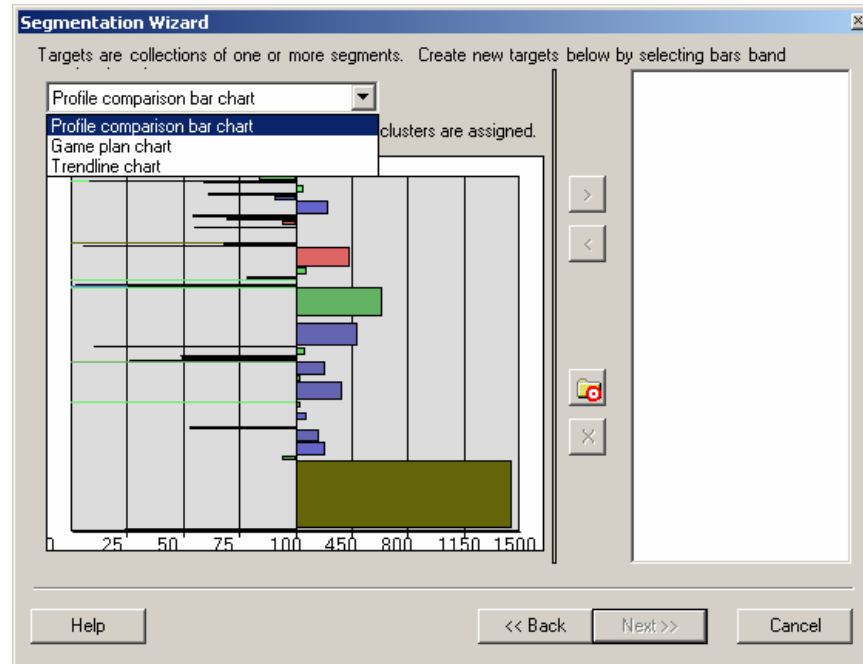


3. Select the *Create target group using existing profiles to create new chart* button. Click the *Add* button and highlight the profile or profiles you would like to add from your existing profile list and click the *Select* button. To delete profiles from the window, highlight the profile and click the *Delete* button. Next select the base profile from the drop-down list of existing profiles. Every profile must have a base profile to compare against. The base profile you select here will be used to calculate the indices on the charts used for selection. For this example, we will select the Chicago, IL CBSA, because almost all customers in the Chicago Customers profile we will use are from the Chicago-Naperville, IL CBSA. Finally, select a target group from the list of existing target groups. The target group selected will be used for display purposes and can be used as a sorting option for the charts. For this example, leave the default of Lifemodes and click Next.

The image shows a 'Segmentation Wizard' dialog box with the following configuration:

- Create target group using one of existing charts
- Create target group using existing profiles to create new chart :
- Select chart: [Empty dropdown]
- Select one or more profiles: [List containing 'Chicago Customers']
- Add... [Button]
- Delete [Button]
- Select base profile: [Dropdown containing 'Chicago, IL CBSA']
- Select target group: [Dropdown containing 'Lifemodes']
- Help [Button]
- << Back [Button]
- Next >> [Button]
- Cancel [Button]

- The next screen will include a *Profile comparison bar chart* that displays all segments sorted by Tapestry ID. This is the default chart that can be used to select segments to be added to your new target groups. There are two other chart types available that can be selected using the drop-down menu.



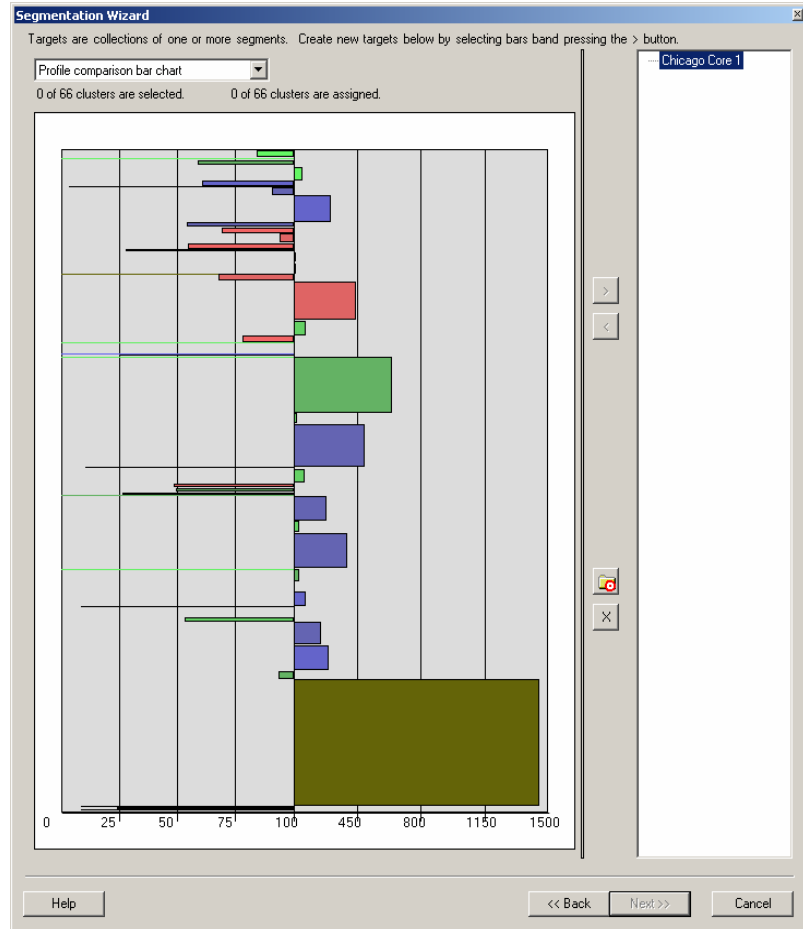
### Option 1 – Profile comparison bar chart

For this first example we will keep the default chart option, *Profile comparison bar chart*, as our selection method for adding segments to create a new target group.

The first step is to expand the display window so that you can better view the selection chart. The chart displays all 66 Tapestry segments as bars on a chart, where the length of each bar varies based on the value of the customer profile index for each segment and the width of the bar varies based on percent composition of the customer profile for each segment.

The center of the bar chart is always set to 100 since an index of 100 is average. Segments with indices that are greater than 100 are displayed to the right of center and segments with indices below average are displayed to the left of center on the bar chart.

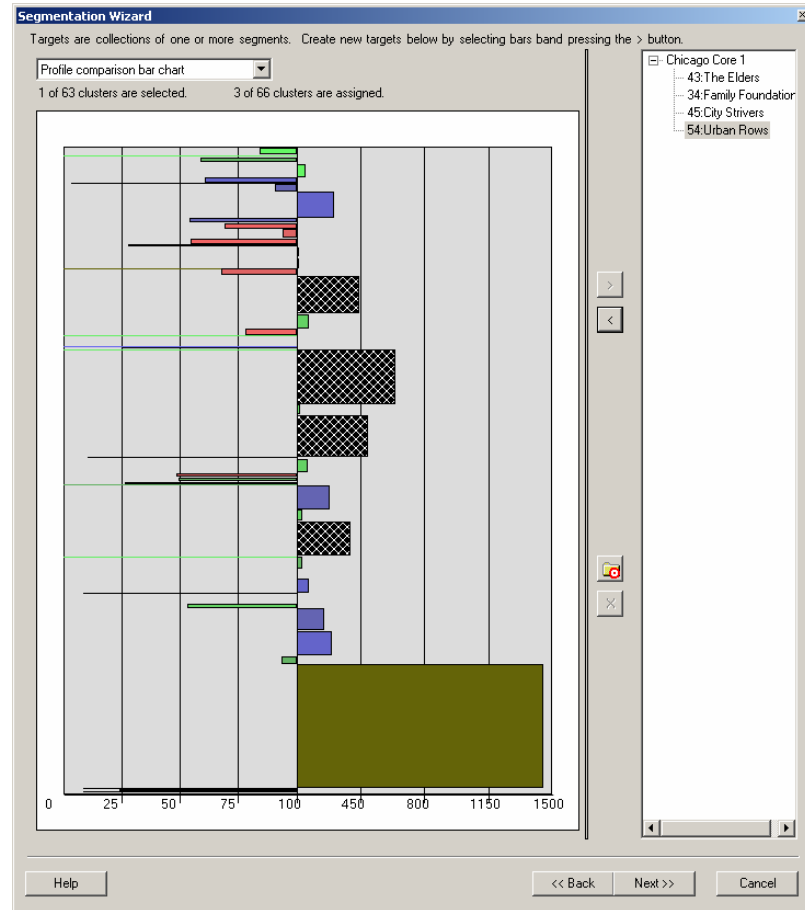
By selecting the segments with longer, thicker bars to the right of center you will be selecting segments that have relatively higher indices and higher penetration into the market. Click the button with the folder and a target on it to create your new target group and type a name for your new target group.



Create your core target group by selecting the segments with bars that are both long and wide since these segments have a combination of both a high index and high penetration into the market. Select the segments by clicking on the bar and clicking the right arrow key. Select the segments you would like to add from the window on the left either one at a time or in a group by using your Shift or Ctrl key to select several segments and then clicking the right arrow key. The segments you selected will now be listed under your new target group in the window on the right and will be highlighted and shaded with a crosshatch pattern in the window on the left.

To deselect segments highlight the segment or segments in the window on the right and click the left arrow button to move them back to the available segments list. As you can see, you can only assign each segment to a single target group.

You can create another target group by clicking the folder with a target button again. You can delete target groups by highlighting the group name in the window on the right and clicking the button with an X on it. You can also delete, rename, or create target groups by right clicking on the target group in the box on the right.

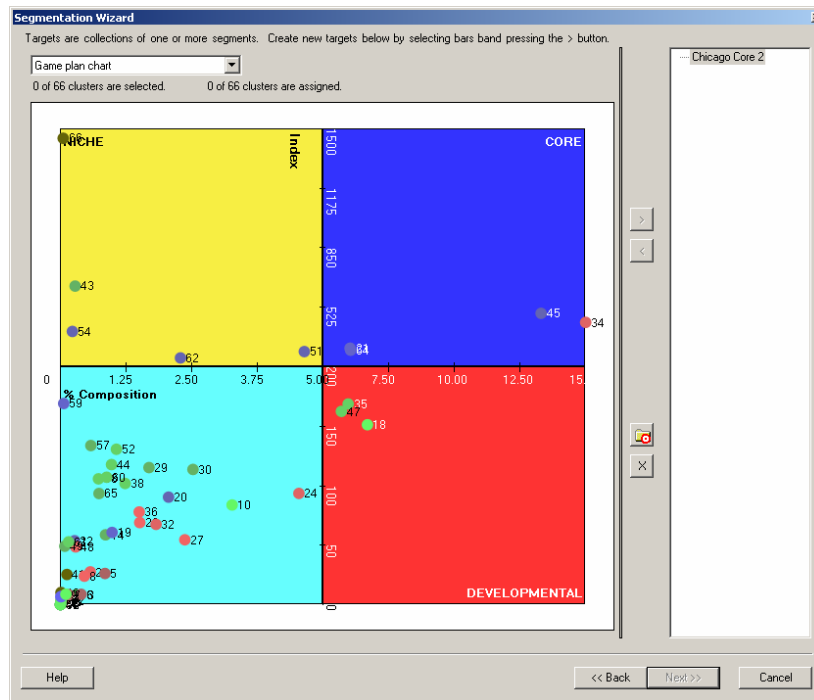


Once you have created the groups as desired, click Next and name your new target groups and then click Finish.

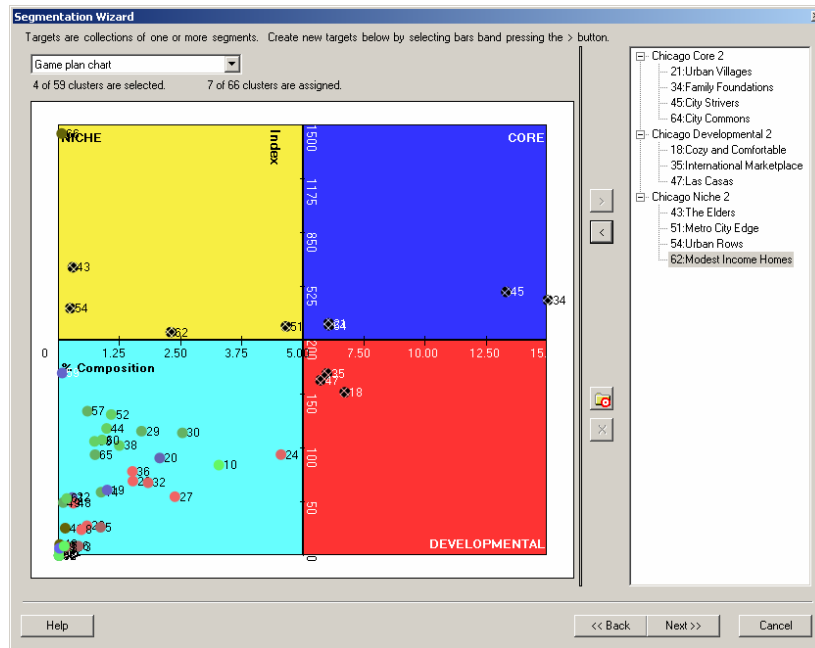


## Option 2 – Game Plan Chart

For this example we will use the Game plan chart as our selection method for adding segments to create a new target group. The first step is to expand the display window so that you can better view the selection chart. The *Game plan chart* displays all 66 Tapestry segments as a point on an x y chart where the y axis value represents the index of each segment and the x axis value represents the percent composition of the segment. This chart is divided into quadrants where the default center line values are automatically set based on the values in the chart. By dragging the center lines left to right or up and down, you can manually adjust the center line values on this chart and accordingly adjust which segments fall into each of the four quadrants on the chart. Use this chart to easily identify and select Core, Developmental, and Niche customers based on where they fall in the chart. For this example, the index center line is set to 200 and the % composition center line is set to 5.0. Click the button with the folder and target on it to create your new target group and type a name for your new target group.

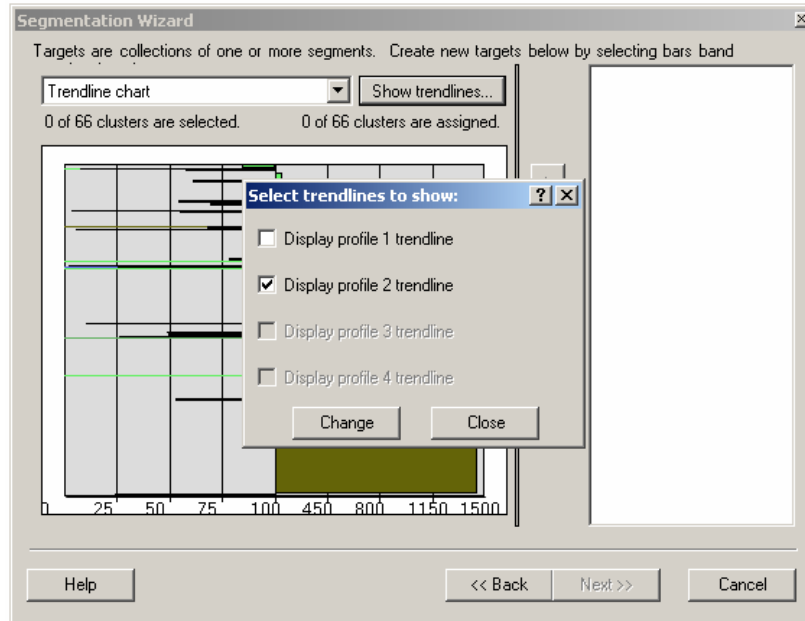


Create your core target group by selecting the segments in the upper right hand box labeled CORE as these segments have a combination of both a high index and also make up a large percent of your customers. Select all the segments in the CORE box by placing your mouse at one corner of the core box and clicking and dragging your mouse to the opposite corner of the CORE box and letting go of the mouse button. You can also select the segments you would like to add from the chart on the left by clicking on the points either one at a time or in a group by using your Shift or Ctrl key and then clicking the right arrow key. The segments you selected will now be listed under your new target group in the window on the right and will be highlighted and shaded with a crosshatch pattern in the window on the left. To deselect segments, highlight the segment or segments in the window on the right and click the left arrow button to move them back to the available segments list. As you can see, you can only assign each segment to a single target group. You can create another target group by clicking the folder with a target button again. You can delete target groups by highlighting the group name in window on the right and clicking the button with an X on it. You can also delete, rename, or create target groups by right clicking on the target group in the box on the right. Once you have created the groups as desired, click Next and name your new target groups and then click Finish.

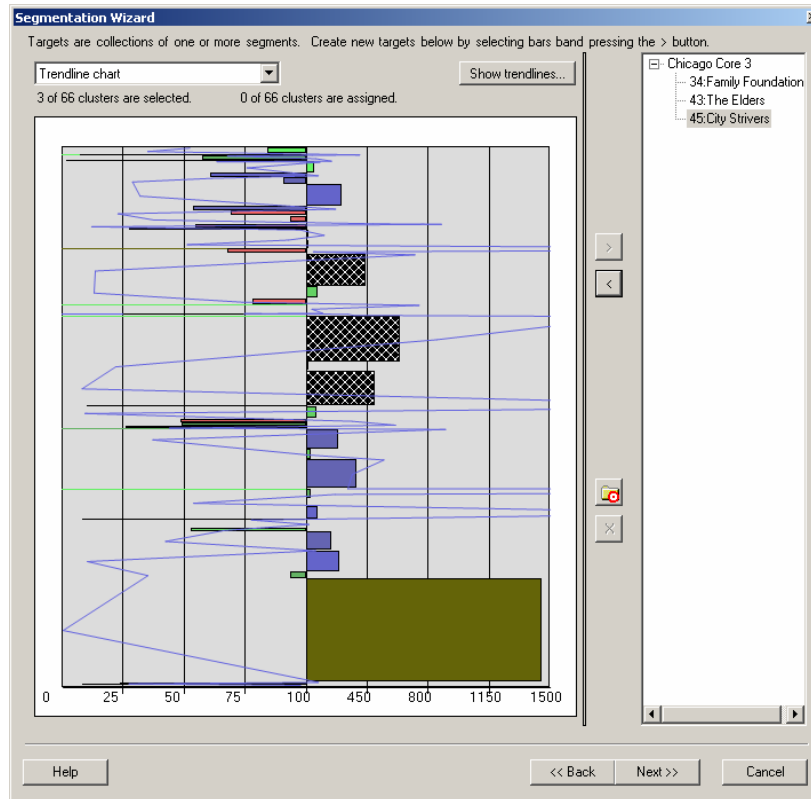


### Option 3 – Trendline Chart

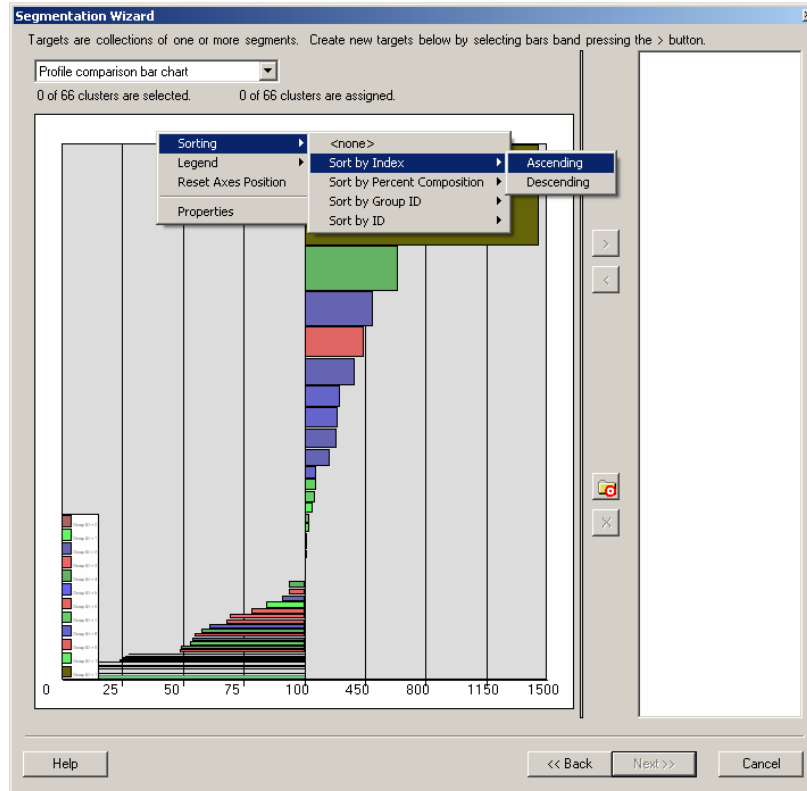
In this last example, we will use the *Trendline chart* as our selection method for adding segments to create a new target group. Using the *Trendline chart* is exactly like using the *Profile comparison bar chart* except that you are able to add trend lines for multiple profiles selected. Click the *Show trendlines* button and check *Display profile 2 trendline* and click *Change* to display a second profile as a trend line on the chart.



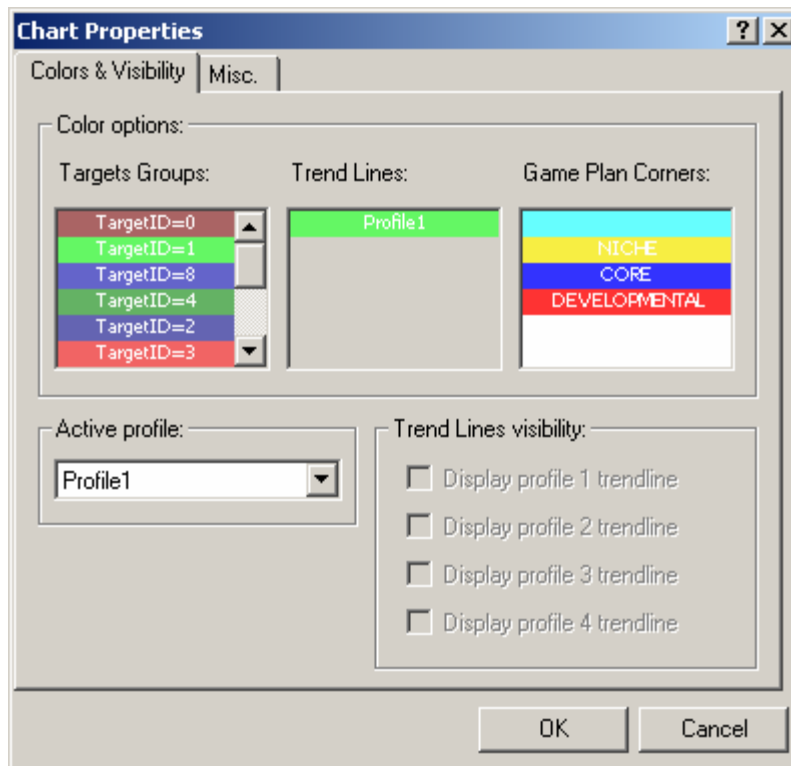
Create your core target group by selecting the segments based on the information provided by both the bars and the trend line(s). Click the button with the folder and a target on it to create your new target group and type a name for your new target group. Select the bars of the segments that you wish to add to your new group. Once you have created the groups as desired, click Next and name your new target groups and then click Finish.



The three charts have a number of options that can be accessed by right clicking the mouse and selecting the desired option. The *Profile comparison bar chart* and the *Trendline chart* can be sorted by Index, Percent Composition, by Group ID based on the target groups you selected on the prior screen, and by Segment ID. For these two charts, you also have the option to add and position the legend. For the *Game Plan*, the *Sorting* and *Legend* options do not apply, but the *Reset Axes Position* option applies and allows you to reset the axes values to their original default values.



The properties of each of the three charts including display colors and labels can be set by right clicking on the chart you wish to change and selecting *Properties*. You can reset the colors used to identify each of the target groups for all three charts by double clicking on the TargetID and selecting a basic color from the palette or by creating custom colors. Create custom colors by clicking the *Define Custom Colors* button. You can create a custom color by left clicking your mouse in the color spectrum box and then clicking in the right slider section to set the darkness or lightness. The color created will be displayed in the Color|Solid box and can be added to your Custom colors by clicking the *Add to Custom Colors* button. On the Misc. tab you can define the quadrant labels on the *Game plan chart* and can select to show the segment labels on the bar charts. Only options that are applicable to the chart being modified can be changed.

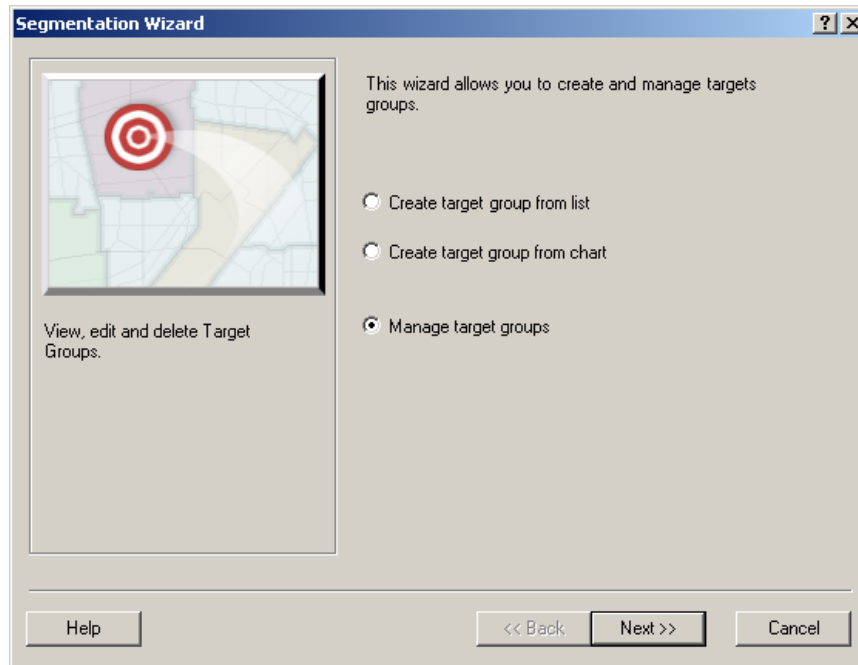


## Manage target groups

Use this option to manage the target groups you created in Business Analyst. You can modify, delete, and rename existing target groups.

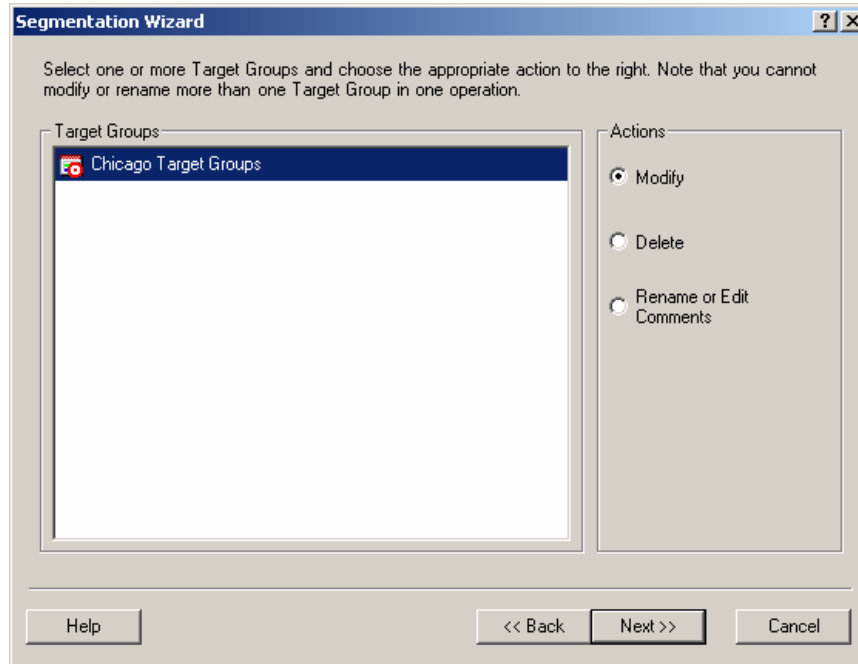
### Manage target groups

1. Select Segmentation, Create target groups from the Business Analyst Drop-down main menu
2. Chose *Manage target groups* and click Next.



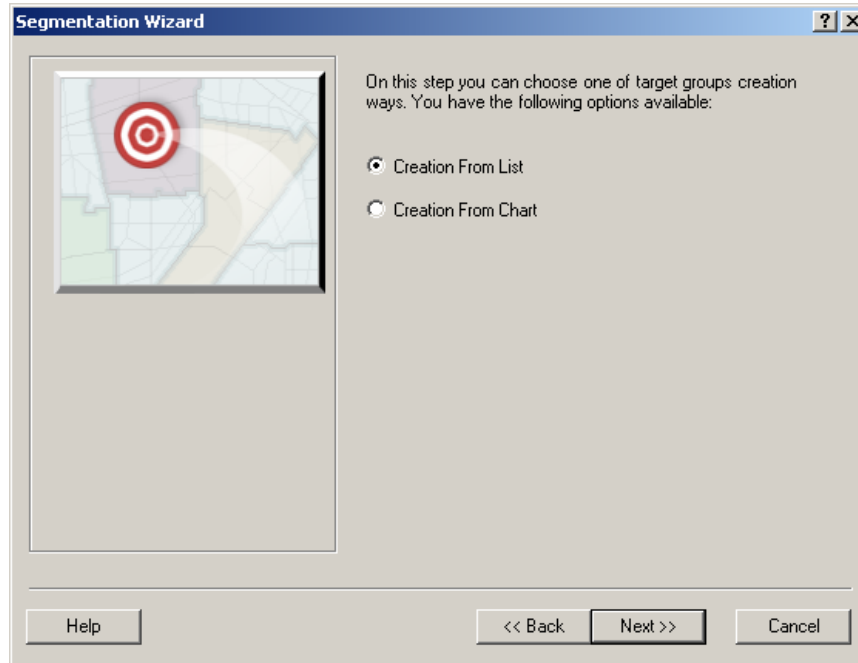
## Modify

1. Use this option to modify an existing target group by over-writing it with a new target group. Select the target group you wish to overwrite, select *Modify profile* and click Next.



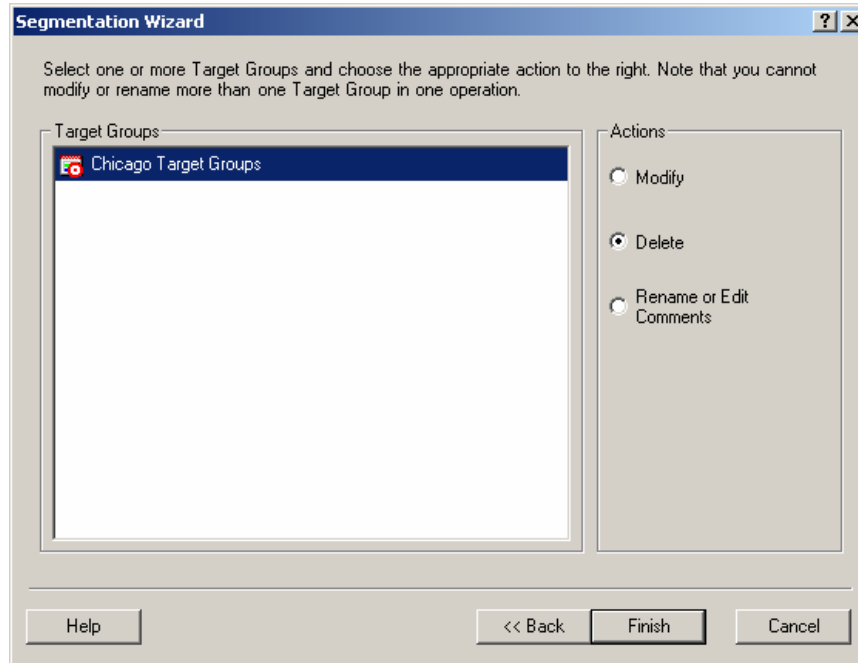


2. Select the option you would like to use to overwrite the existing target group you selected on the previous screen. The steps for each of these target group creation methods have already been documented under the *Create target group from list* and *Create target group from chart* sections of this guide.

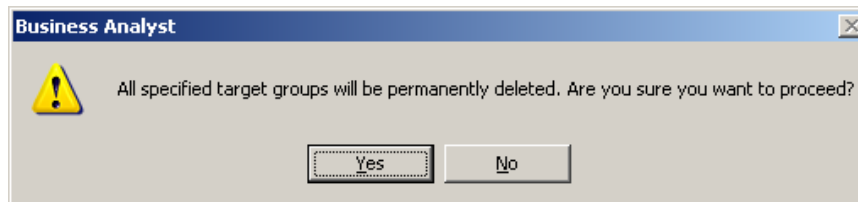


## Delete

1. Use this option to delete an existing target group. Select the target group(s) you wish to delete by highlighting them from the list box. Select Delete and click Finish.

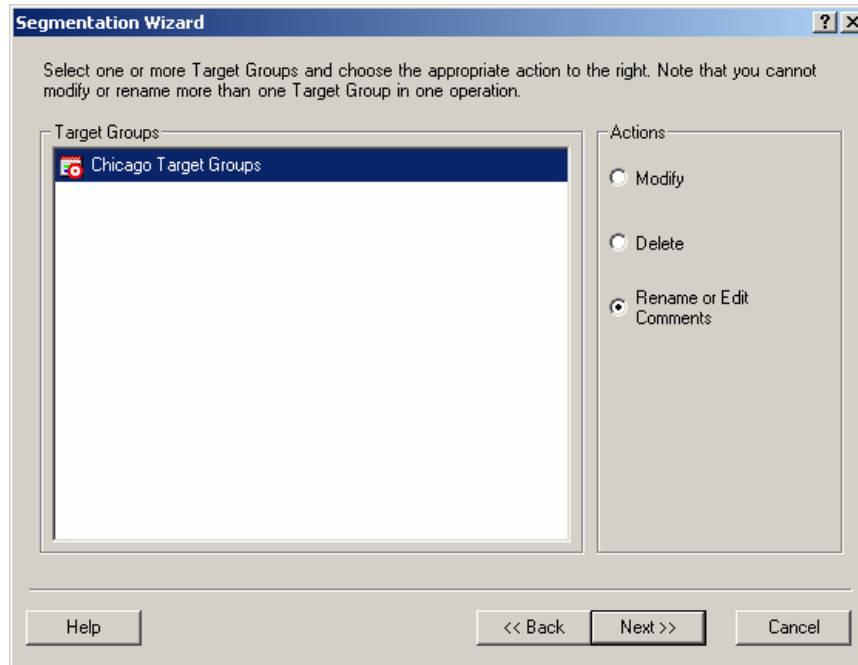


2. You will receive the warning message below. Click yes, to delete the target group(s).

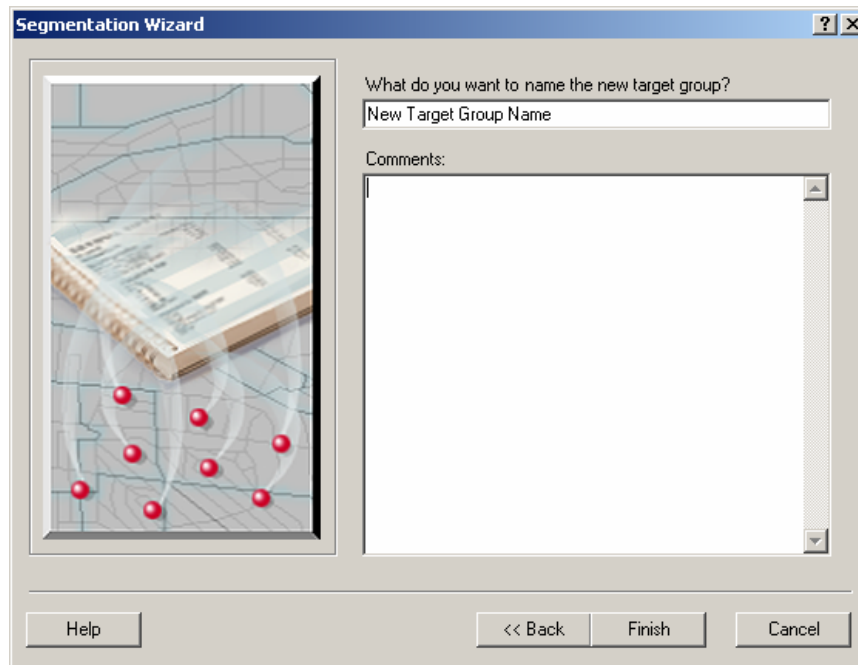


## Rename or Edit comments

1. Use this option to rename an existing target group or to modify the comments associated with an existing target group. Select the target group you wish to rename or edit comments by highlighting it from the list box. Select *Rename or Edit comment* and click Next.



2. Edit the target group name or comments as desired and click Finish.



## Chapter 4 – Segmentation Charts, Maps, and Reports

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- Create Segmentation maps 118
- Create Segmentation charts 131
- View existing segmentation output 149
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### Segmentation reports, maps, and charts

Now that we have created customer profiles and target groups, we are ready to create reports, maps, and charts that will allow us to better understand and market to these customers. The segmentation reports, maps, and charts are the keys to unlocking the information stored in your customer data.

## ***Segmentation reports***

Use this option to create segmentation reports with your customer data, profiles, and target groups to help you better understand and target your best customers. There are nine segmentation reports available:

### **Customer Tapestry Profile Report**

Displays the Tapestry segments and summary groups that most accurately reflect your customer records and compares your customer profile to the Tapestry profile of your base geography.

### **Core & Development Segments Report**

Displays Core and Developmental segments in a table with customer count and percent, market area count and percent, and index.

### **Understanding Your Target Customers**

Compares the Tapestry profile of your Core and Developmental customers to the Tapestry profile of a syndicated survey. The tables in this report provide indices for the top 20 sports and travel related characteristics plus an optional category of your choice.

### **Developing Marketing Strategies**

Compare the Tapestry profile of your Core and Developmental customers to the Tapestry profile of a syndicated survey. The tables in this report provide indices for the top 20 media reading, watching, and listening related characteristics.

### **Geographic Customer Summary Report**

Displays the geographic areas where most of your customers are located, ranked top to bottom according to the number of customers in each area.

### **Customer Demographic Profile Report**

Summarizes the demographic makeup of the geographies where your customers live.

### **Market Area and Gap Analysis**

Analyze a market by displaying total households, percent Core households, percent Developmental households, actual customers, customer penetration, expected customers, and the gap.

### **Game Plan Chart**

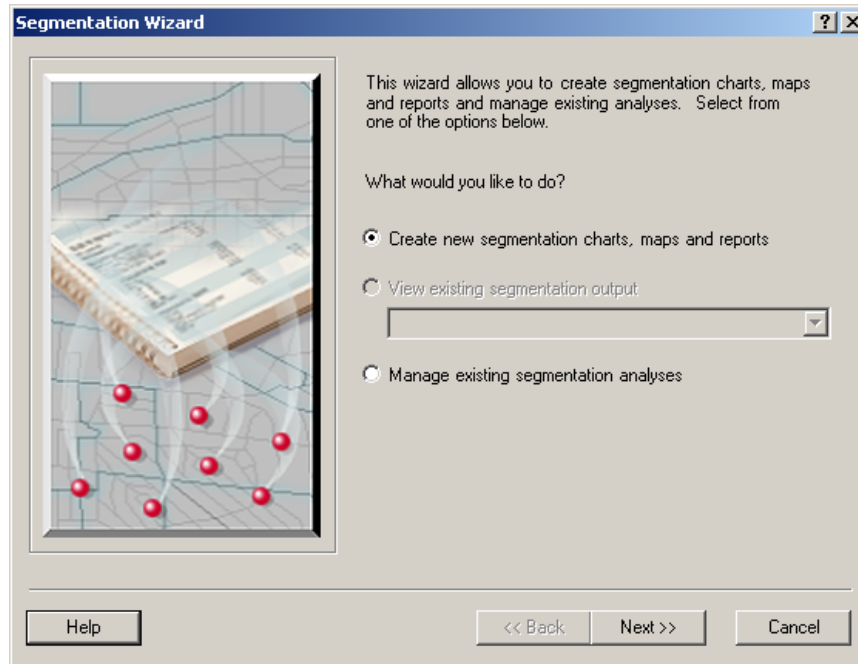
Chart your segments into four quadrants based on percent composition and index. Drag and drop axes to adjust these values. Use this chart to identify core, developmental, and niche segments.

### **Match Level Summary Report**

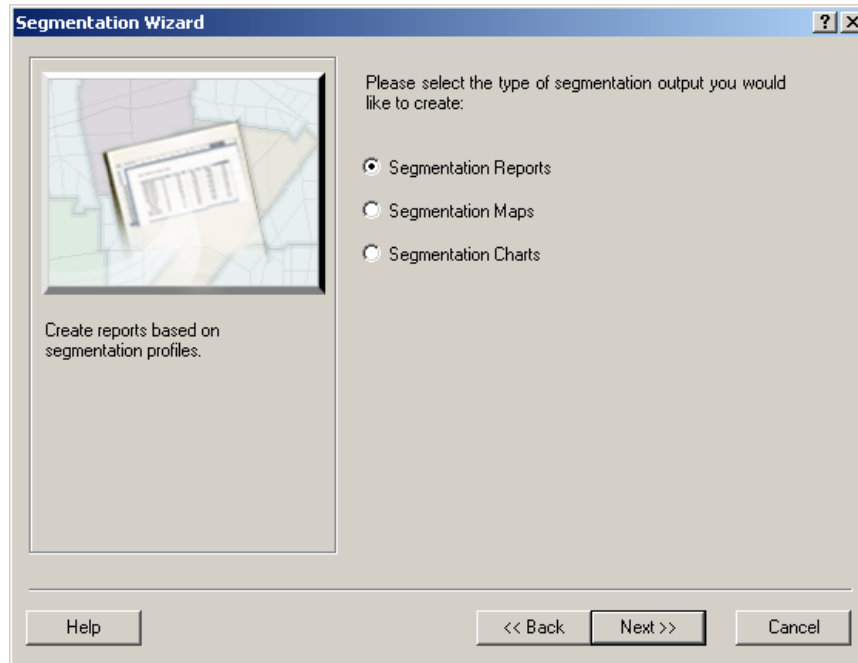
Assigns customer records to one of four match levels based on the geographic code assigned to each customer.

## How to Create Segmentation reports

1. Select Segmentation, Segmentation reports, maps and charts from the Business Analyst Drop-down main menu
2. Choose *Create new segmentation charts, maps, and reports* and click Next.

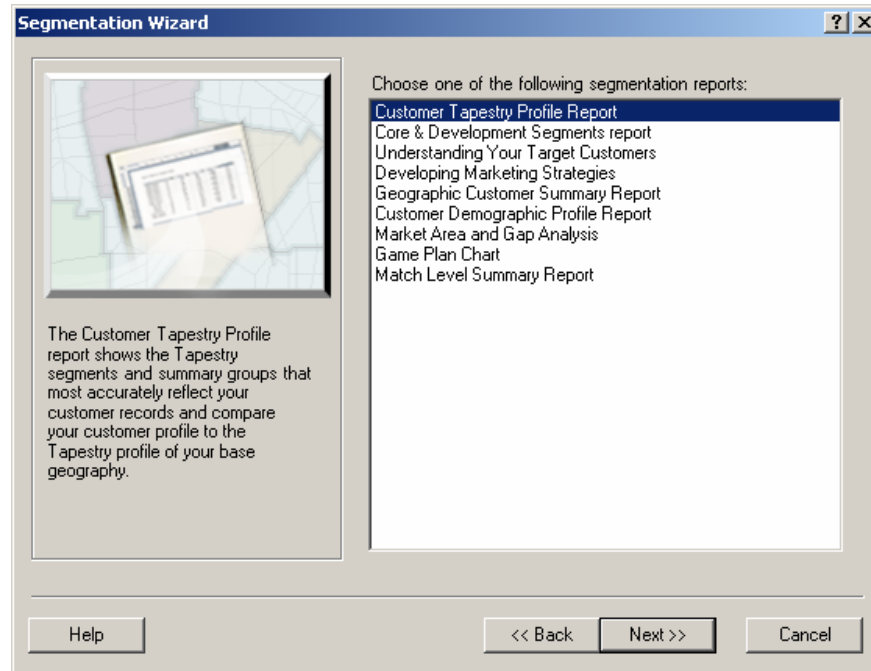


3. Select *Segmentation Reports* and click Next.





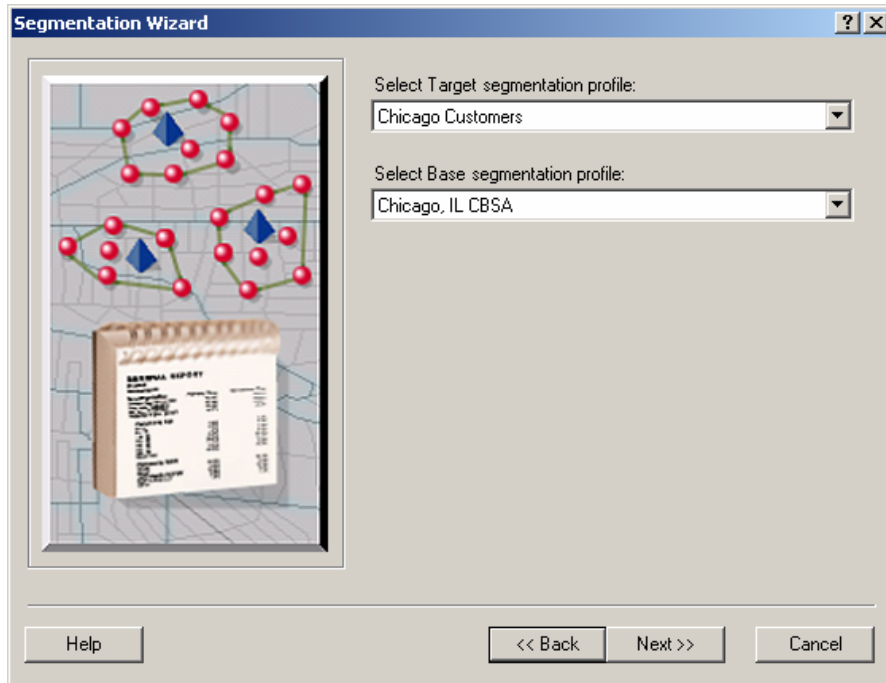
4. Highlight the report you would like to create and click Next.



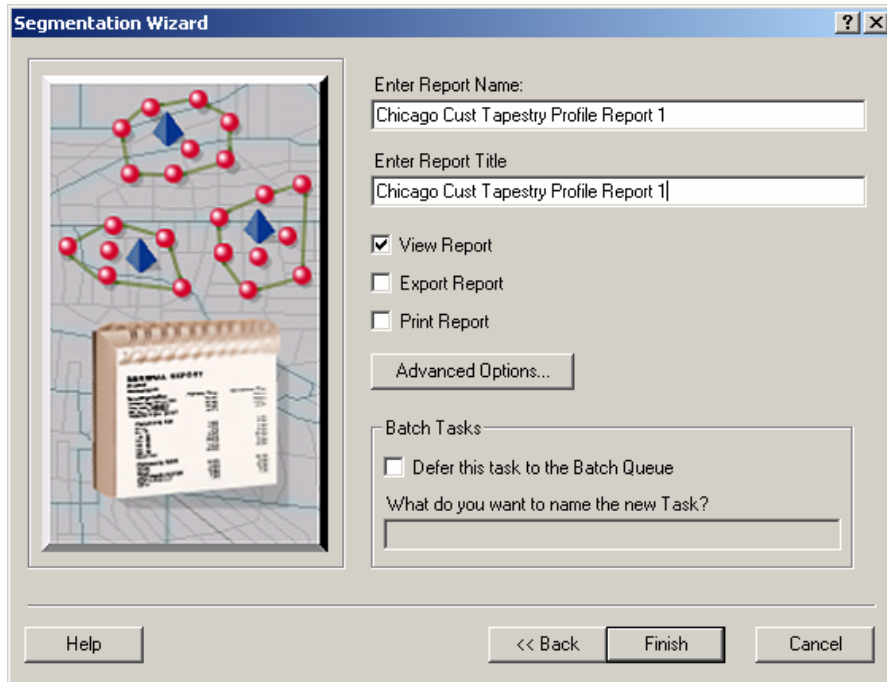
### Option 1 – Customer Tapestry Profile Report

Use this report to display your customers summarized by Tapestry segment and by Tapestry LifeMode and Urbanization groups. The Customer Tapestry Profile Report helps you better understand who your customers are and how they compare to the overall market area. The report is sorted by customer percent composition from highest to lowest. By sorting on customer percentage, we can now see which segments make up the largest percent of your current customers.

First, select a target segmentation profile from an existing customer or survey profile listed in the drop-down menu. This target profile will be used to calculate the percent composition for each segment. Then, select a base segmentation profile from the drop-down list of existing profiles. The base profile will be used to calculate the index. In most cases the base profile you select should be the geographic area from where you draw close to 100% of your customers. Once you have selected the desired target and base segmentation profiles click Next.



Enter a Report Name and Report Title in the text boxes. These should be descriptive of the profiles selected to create this report. *View Report* is the default option which displays the finished report in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your reports and selected the desired options, click Finish.



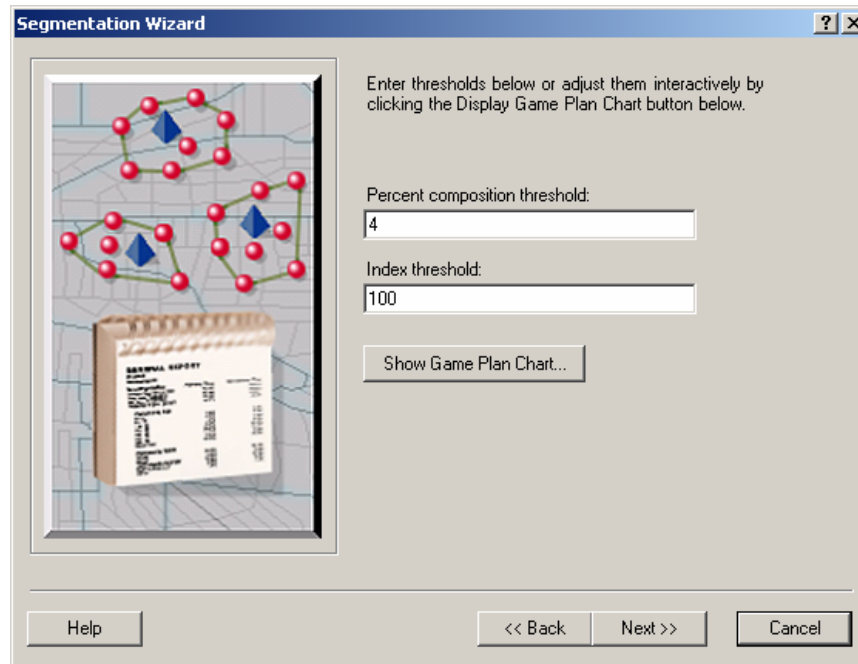
### Option 2 – Core & Development Segments Report

Using this report you can identify your target customers using a combination of two factors: Index and Percent of Customers. These two factors, in different combinations can define your Core and Developmental target groups.

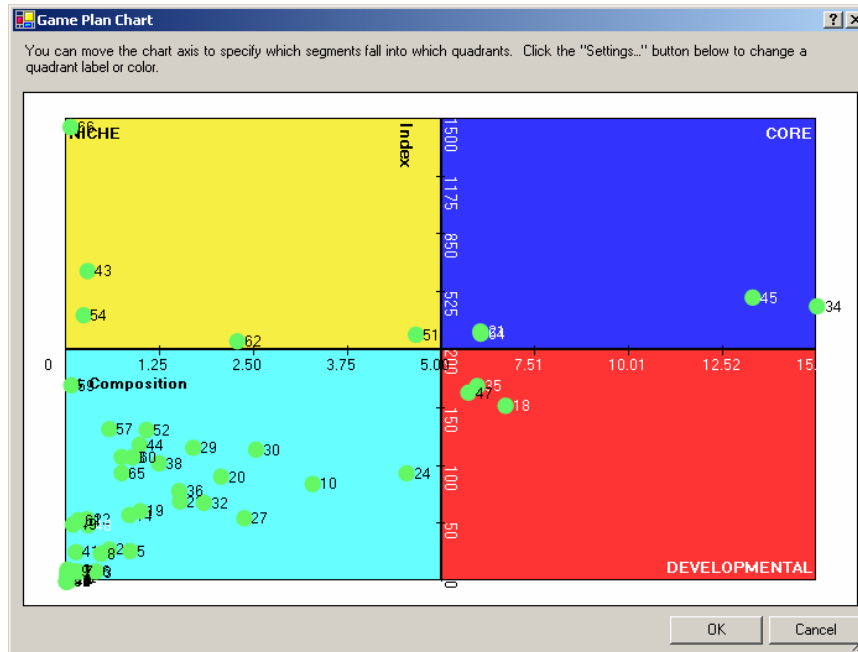
The first step in creating a *Core & Development Segments Report* is to select a target segmentation profile from an existing customer or survey profile listed in the drop-down menu. This target profile will be used to calculate the percent composition for each segment that will be used to determine your Core and Developmental target segments. You will then need to select a base segmentation profile from the drop-down list of existing profiles. The base profile will be used to calculate the index used to identify Core and Developmental target segments. In most cases the base profile you select should be the geographic area from where you draw close to 100% of your customers. Once you have selected the desired target and base segmentation profiles click Next.

The screenshot shows a software dialog box titled "Segmentation Wizard". It features a preview window on the left displaying a map with red and blue markers and a document titled "SEGMENTAL REPORT". On the right side, there are two dropdown menus. The first is labeled "Select Target segmentation profile:" and has "Chicago Customers" selected. The second is labeled "Select Base segmentation profile:" and has "Chicago, IL CBSA" selected. At the bottom of the dialog, there are four buttons: "Help", "<< Back", "Next >>", and "Cancel".

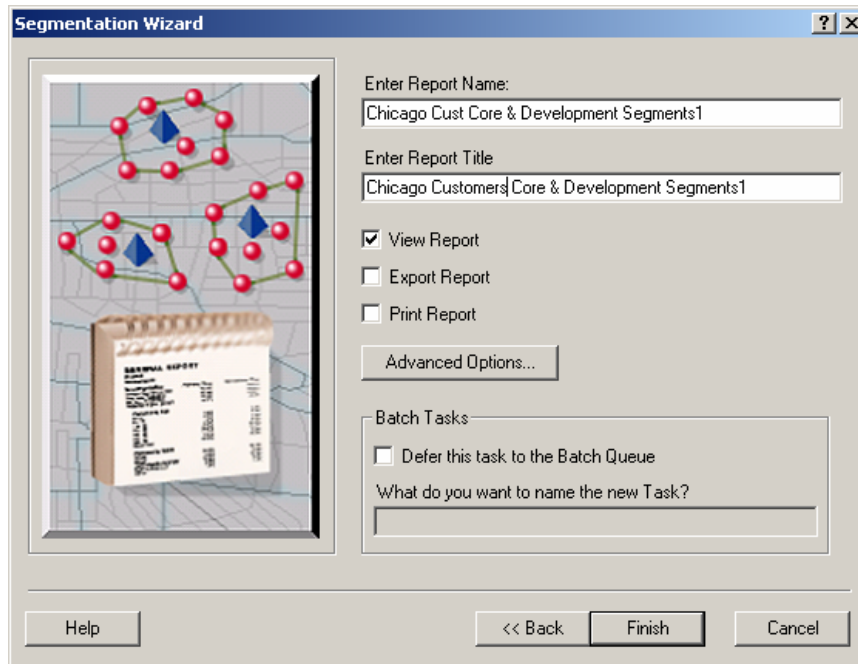
To identify which segments will be included in your Core and which segments will be in your Development target groups, you will need to set the threshold percent customer composition and threshold index. The default value for the *Percent composition threshold* is 4 percent which means only segments that make up at least 4.0% of total customers will be included in your Core and Developmental Target Groups. The default value for the Index threshold is 100 which means only segments that have an index of 100 or greater will be identified as Core segments. Segments with an index less than 100 and greater than 4.0% composition will be defined as Developmental target segments.



You can also choose to set these threshold values interactively using a Game Plan Chart. Click the *Show Game Plan Chart* button to display a Game Plan Chart with center line values set to the current threshold values and then adjust the center lines to set the desired % Composition and Index values and click OK.



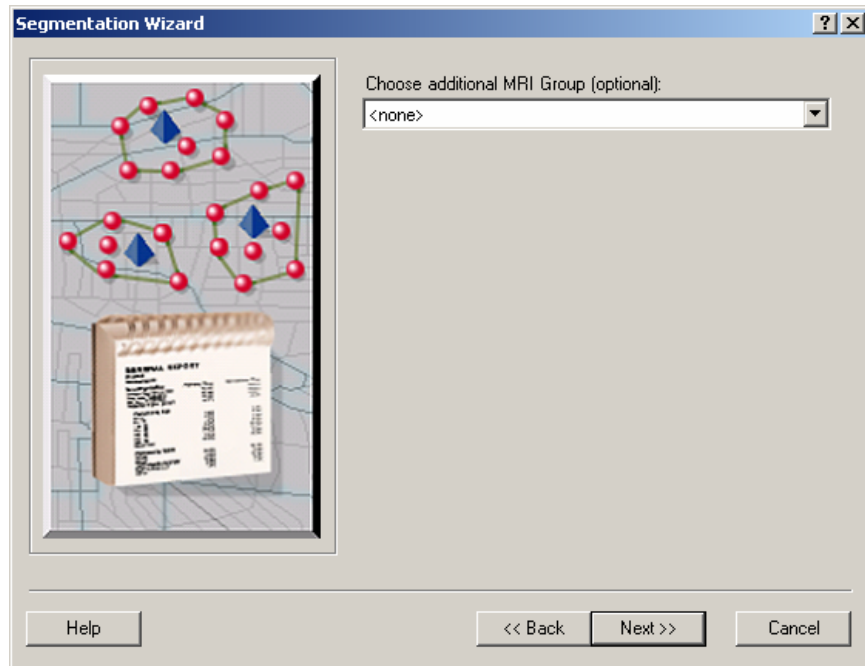
Enter a Report Name and Report Title in the text boxes. These should be descriptive of the profiles selected to create this report. *View Report* is the default option which displays the finished report in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your reports and selected the desired options, click Finish.



### Option 3 –Understanding Your Target Customers

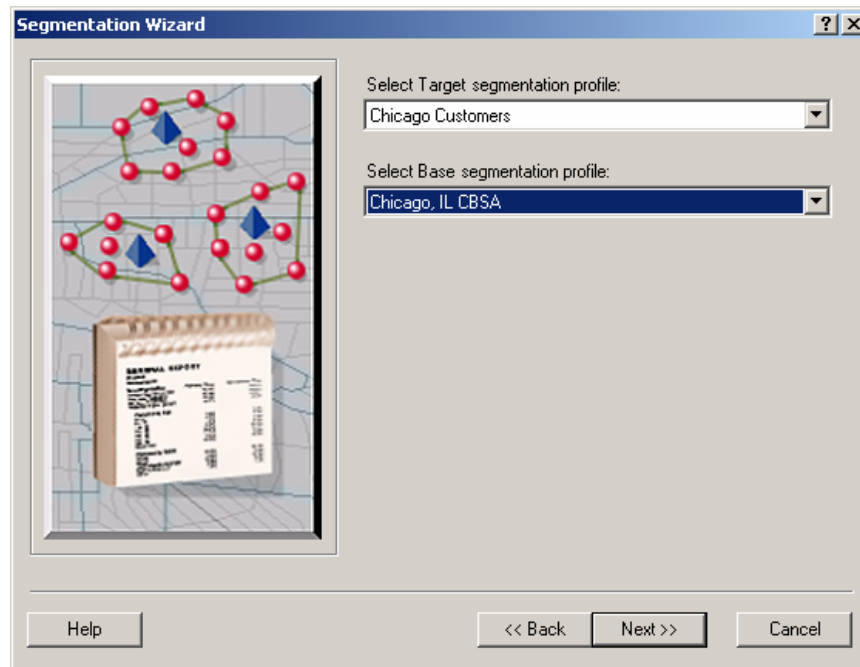
Use this report to learn more about the lifestyles of your target segments. Using the Tapestry profile of your customers, we are able to calculate a weighted index that takes into account the percent composition for each segment of your target customers as compared to the index for that segment for any specific product, service, or lifestyle characteristic from the MRI survey data included with the Business Analyst Segmentation Module Add-on. By default, this report includes the Sports and Travel survey data categories. You are also given the option to add one category of your choice to the report. Since we want to focus on the difference between the target segment groups (Core and Developmental), we have calculated weighted indices for each group separately. If the weighted index is above 100, then your customers are more likely to purchase this product or service or have this lifestyle characteristic than the average household in the United States. The tables provide indices for the top 20 lifestyle characteristics that your Core and Developmental customers are expected to use at the highest rates sorted from high to low based on the index for your Core Customers.

The first step in creating this report is to choose an optional MRI survey data category to be displayed on the report. This could be a category that is related to your line of business. For example, if your business is a restaurant, you could add the MRI restaurant category to learn more about what restaurant related products and services your target customers are most likely to purchase or use. To select an additional MRI category to be displayed on this report, use the drop-down menu and select from a list of available MRI survey data categories and click Next.

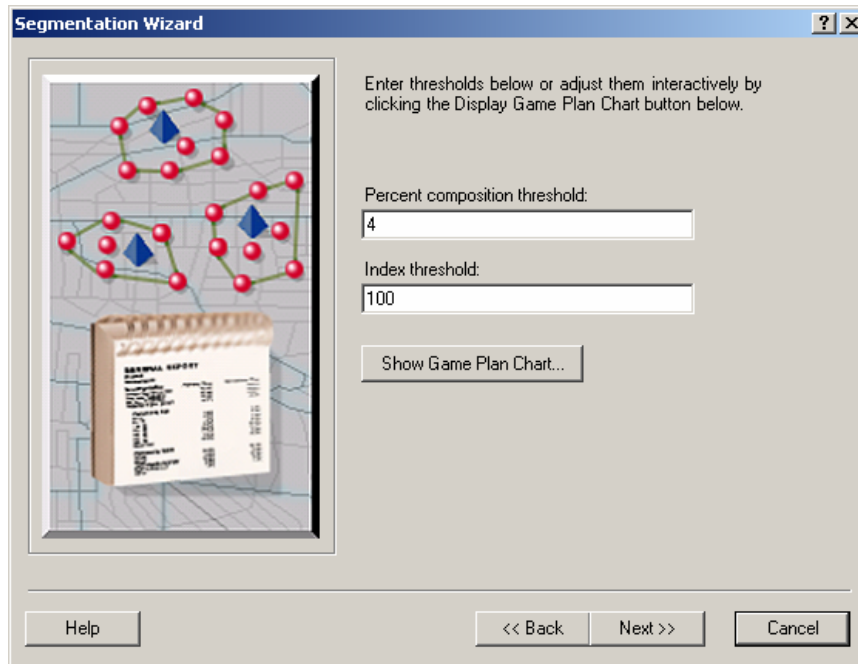




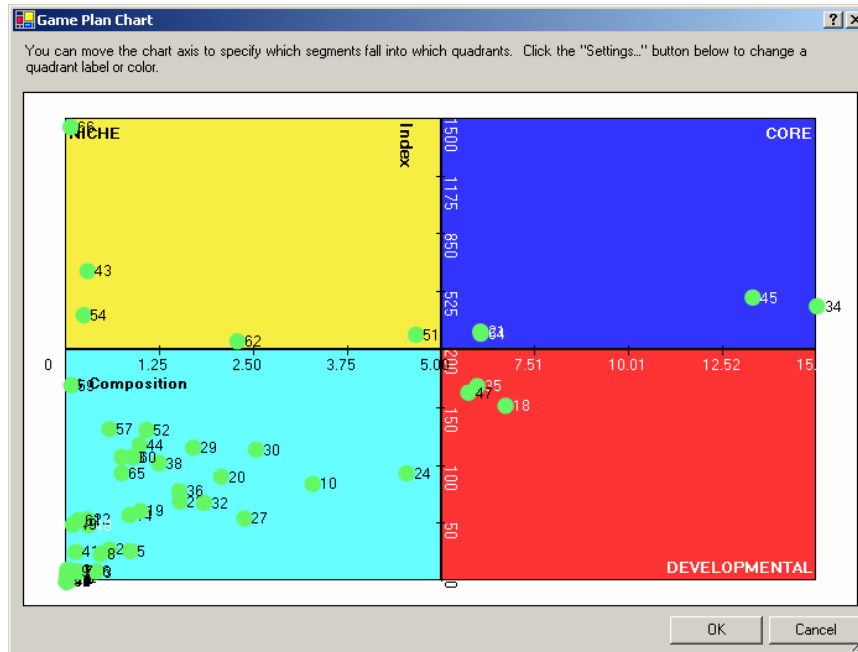
The next step in creating an *Understanding Your Target Customers* report is to select a target segmentation profile from an existing customer or survey profile listed in the drop-down menu. This target profile will be used to determine your Core and Developmental target segments and to calculate the percent weighted index for each of the survey data categories based on the Core and Developmental target segments. You will then need to select a base segmentation profile from the drop-down list of existing profiles. The base profile will be used to calculate the index used to identify Core and Developmental target segments. In most cases the base profile you select should be the geographic area from where you draw close to 100% of your customers. Once you have selected the desired target and base segmentation profiles click Next.



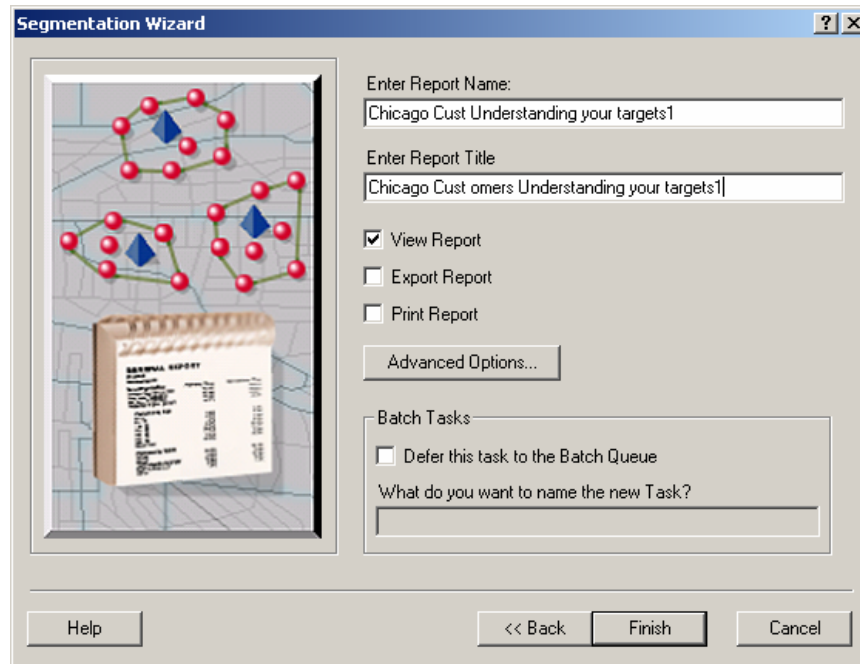
To identify which segments will be included in your Core and which segments will be in your Development target groups you will need to set the threshold percent customer composition and threshold index. The default value for the *Percent composition threshold* is 4 percent which means only segments that make up at least 4.0% of total customers will be included in your Core and Developmental Target Groups. The default value for the *Index threshold* is 100 which means only segments that have an index of 100 or greater will be identified as Core segments. Segments with an index less than 100 and greater than 4.0% composition will be defined as Developmental target segments.



You can also choose to set these threshold values interactively using a Game Plan Chart. Click the *Show Game Plan Chart* button to display a Game Plan Chart with center line values set to the current threshold values and then adjust the center lines to set the desired % Composition and Index values and click OK.



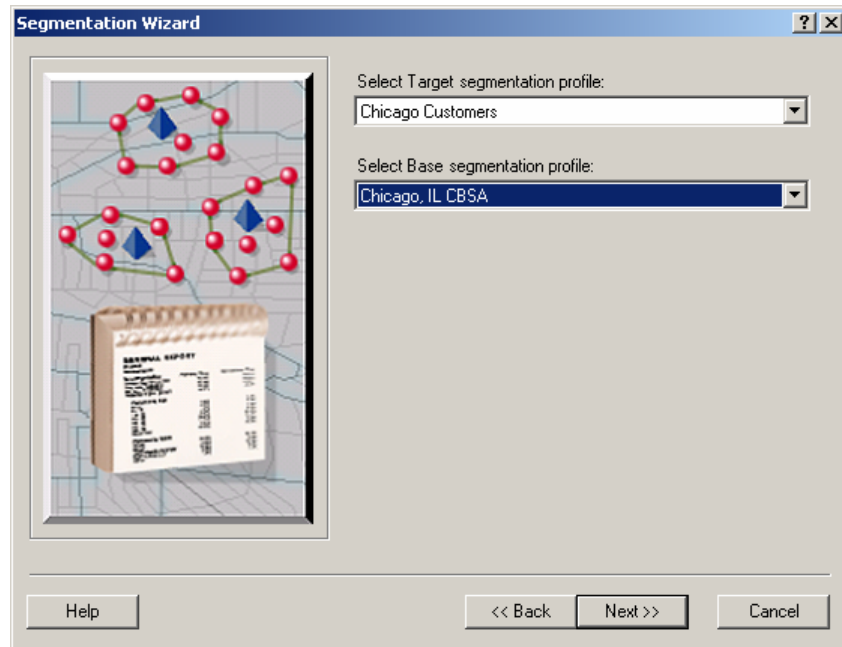
Enter a Report Name and Report Title in the text boxes. These should be descriptive of the profiles selected to create this report. *View Report* is the default option which displays the finished report in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your reports and selected the desired options, click Finish.



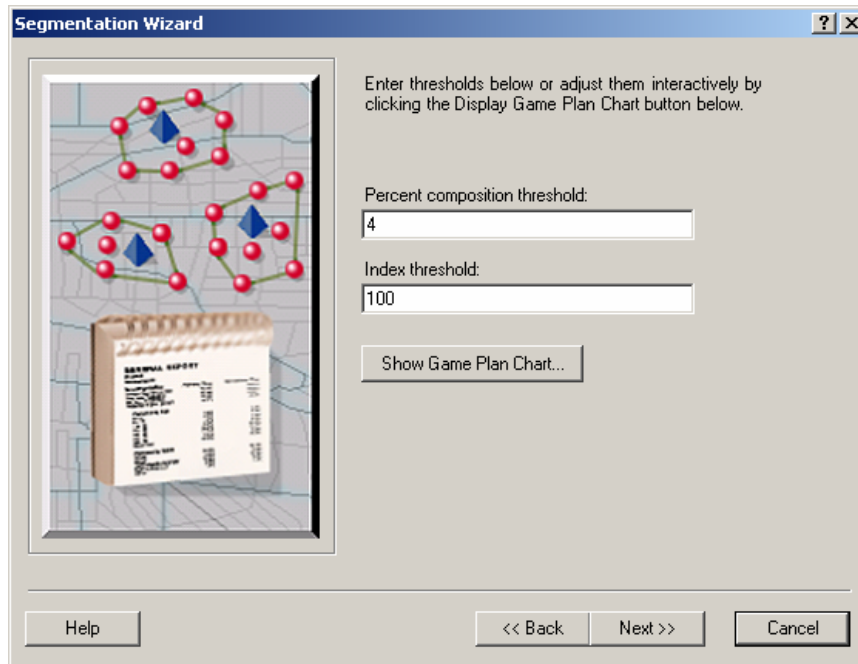
#### Option 4 – Developing Marketing Strategies

Use this report option to learn more about the media preferences of your target segments. This report can help you develop a marketing and media strategy designed to reach your target customers and more like them. Using the Tapestry profile of your customers, we are able to calculate a weighted index that takes into account the percent composition for each segment of your target customers as compared to the index for that segment for any specific media usage characteristic from the MRI survey data included with the Business Analyst Segmentation Module Add-on. By default, this report includes the Media Read, Listen, and Watch survey data categories. Since we want to focus on the difference between the target segment groups (Core and Developmental), we have calculated weighted indices for each group separately. If the weighted index is above 100, then your customers are more likely to purchase this product or service or have this lifestyle characteristic than the average household in the United States. The tables provide indices for the top 20 Media Read, Listen, and Watch characteristics that your Core and Developmental customers are expected to use at the highest rates sorted from high to low based on the index for your Core Customers.

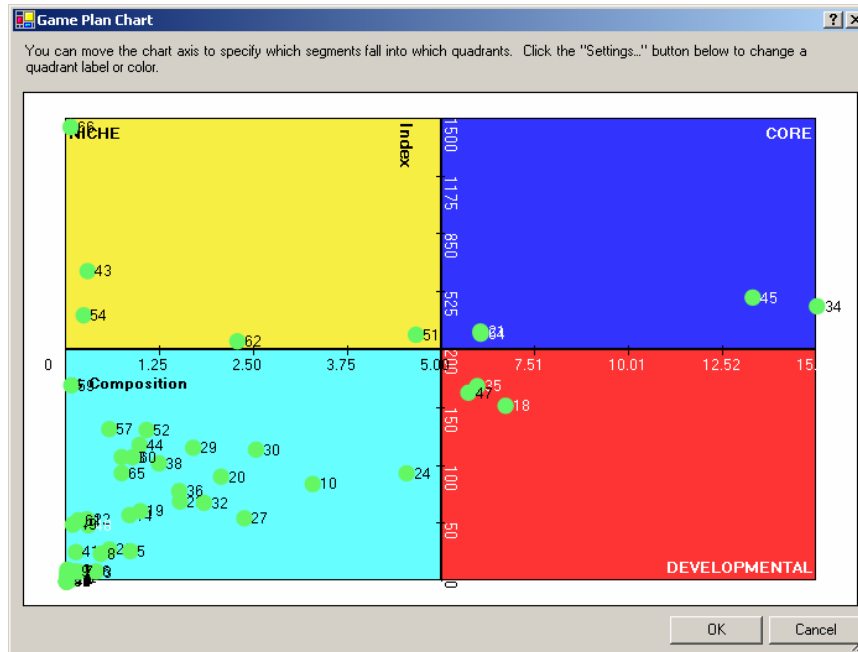
The first step in creating a *Developing Marketing Strategies Report* is to select a target segmentation profile from an existing customer or survey profile listed in the drop-down menu. This target profile will be used to determine your Core and Developmental target segments and to calculate the percent weighted index for each of the survey data categories based on the Core and Developmental target groups. Then, select a base segmentation profile from the drop-down list of existing profiles. The base profile will be used to calculate the index used to identify Core and Developmental target segments. In most cases the base profile you select should be the geographic area from where you draw close to 100% of your customers. Once you have selected the desired target and base segmentation profiles, click Next.



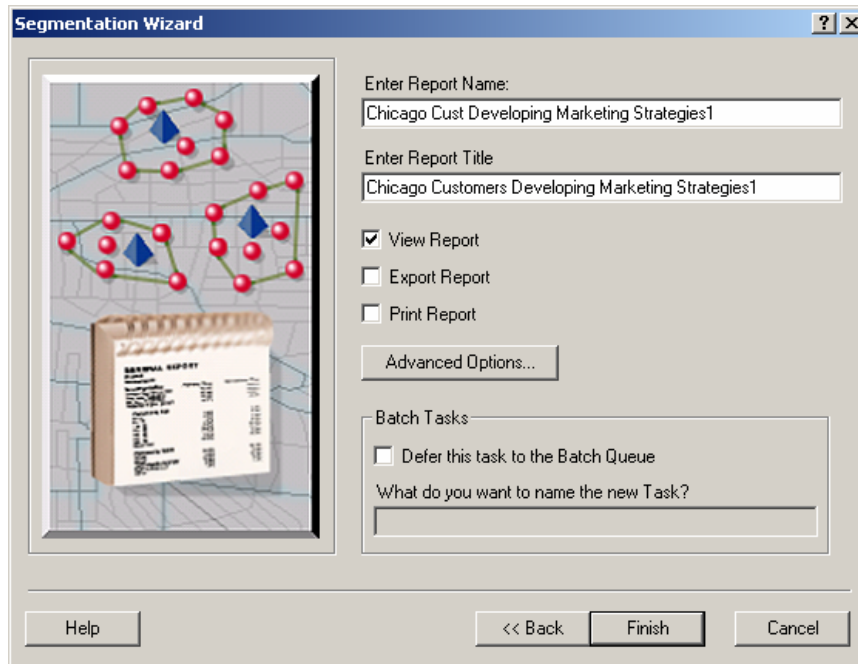
To identify which segments will be included in your Core and which segments will be in your Development target groups you will need to set the threshold percent customer composition and threshold index. The default value for the *Percent composition threshold* is 4 percent which means only segments that make up at least 4.0% of total customers will be included in your Core and Developmental Target Groups. The default value for the *Index threshold* is 100 which means only segments that have an index of 100 or greater will be identified as Core segments. Segments with an index less than 100 and greater than 4.0% composition will be defined as Developmental target segments.



You can also choose to set these threshold values interactively using a Game Plan Chart. Click the *Show Game Plan Chart* button to display a Game Plan Chart with center line values set to the current threshold values and then adjust the center lines to set the desired % Composition and Index values and click OK.



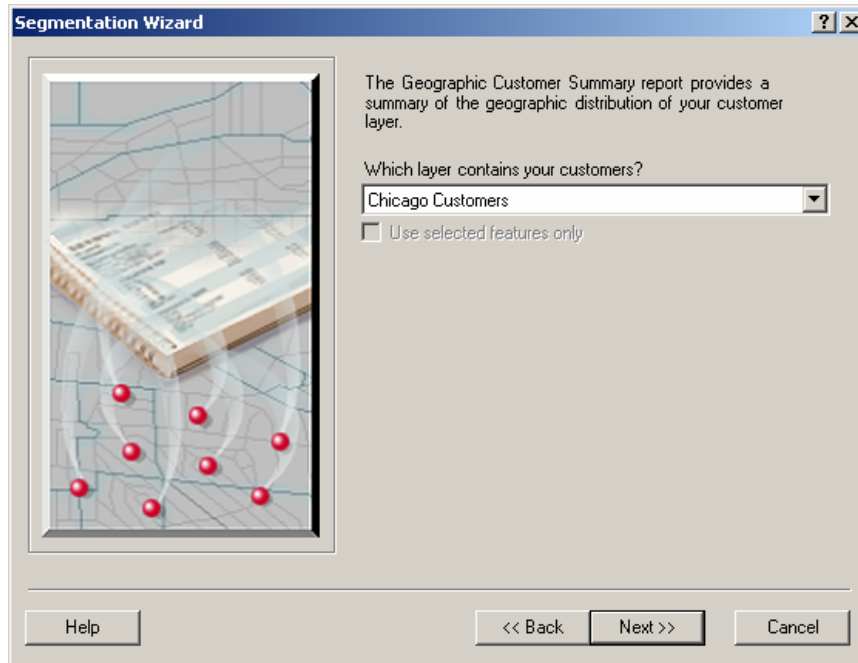
Enter a Report Name and Report Title in the text boxes. These should be descriptive of the profiles selected to create this report. *View Report* is the default option which displays the finished report in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your reports and selected the desired options, click Finish.



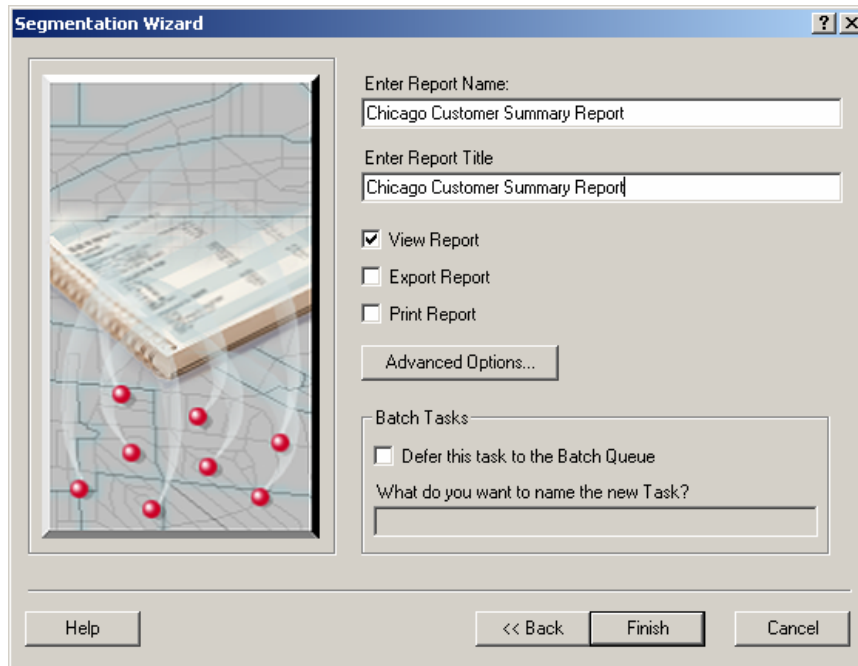


### Option 5 – Geographic Customer Summary Report

Use this report option to learn more about the geographic areas where most of your customers are located. The first step to running this report is to go to the Customer Setup option from your main Business Analyst drop-down menu and either select to *View an existing Customer Layer* or *Create a new Customer Layer* (see Using ArcGIS Business Analyst guide for instructions on creating a new customer layer). Then select the customer layer you would like to use from the drop-down menu of customer layers displayed in your existing Business Analyst project and click Next.



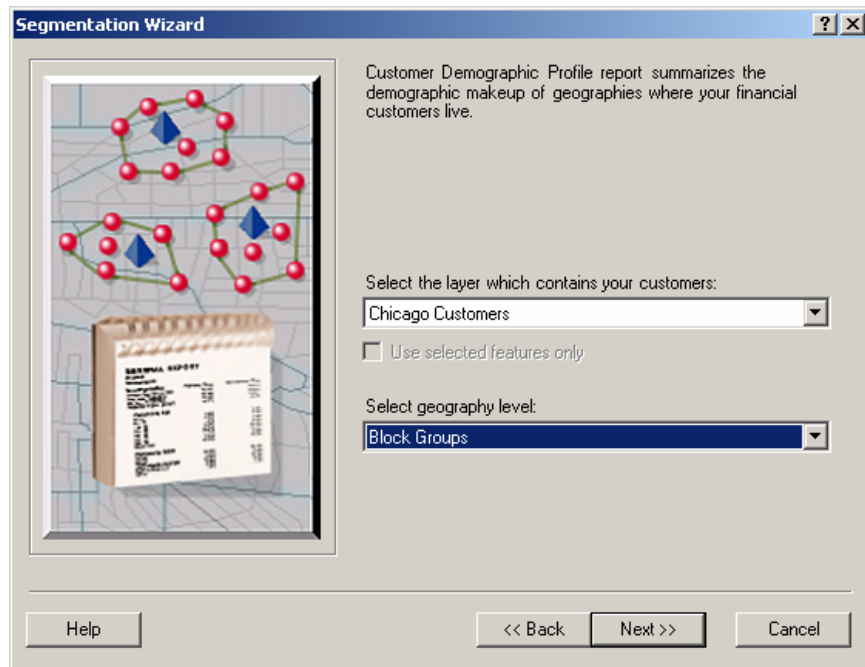
Enter a Report Name and Report Title in the text boxes. These should be descriptive of the profiles selected to create this report. *View Report* is the default option which displays the finished report in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your reports and selected the desired options, click Finish.



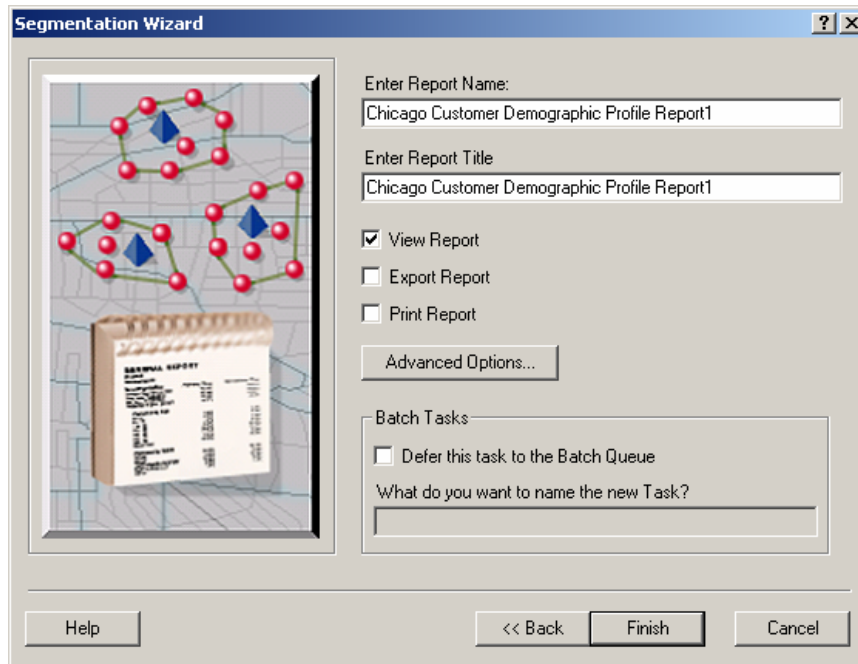
### Option 6 – Customer Demographic Profile Report

Use this report option to learn more about the demographic characteristics of your customers. For this report, Business Analyst uses the geographic information obtained from your customer's address information to append demographic characteristics to each customer record. The *Customer Demographic Profile Report* summarizes the demographic makeup of geographies where your customers live. Based on the information in this report, you can get a sense of the demographic makeup of your customer base.

The first step to running this report is to go to the *Customer Setup* option from your main Business Analyst drop-down menu and either select to *View an existing Customer Layer* or *Create a new Customer Layer* (see Using ArcGIS Business Analyst guide for instructions on creating a new customer layer). Then select the customer layer you would like to use from the drop-down menu of customer layers displayed on your existing Business Analyst project. Next you will need to select the geography level for which demographic data will be aggregated to create this report from the drop-down menu of available levels. Block Groups is the lowest available level of geography and will give you the most accurate demographic profile. But, it also takes a long time to process because Business Analyst will be aggregating weighted demographic information for every block group in which your customers are located. Once you have selected your customer layer and geography level, click Next.



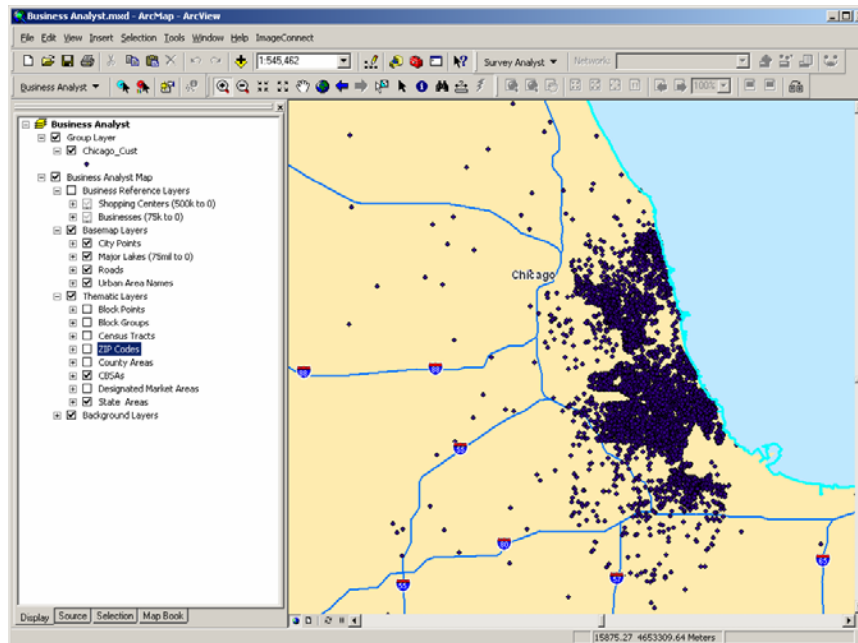
Enter a Report Name and Report Title in the text boxes. These should be descriptive of the customer layer selected to create this report. *View Report* is the default option which displays the finished report in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your reports and selected the desired options, click Finish.



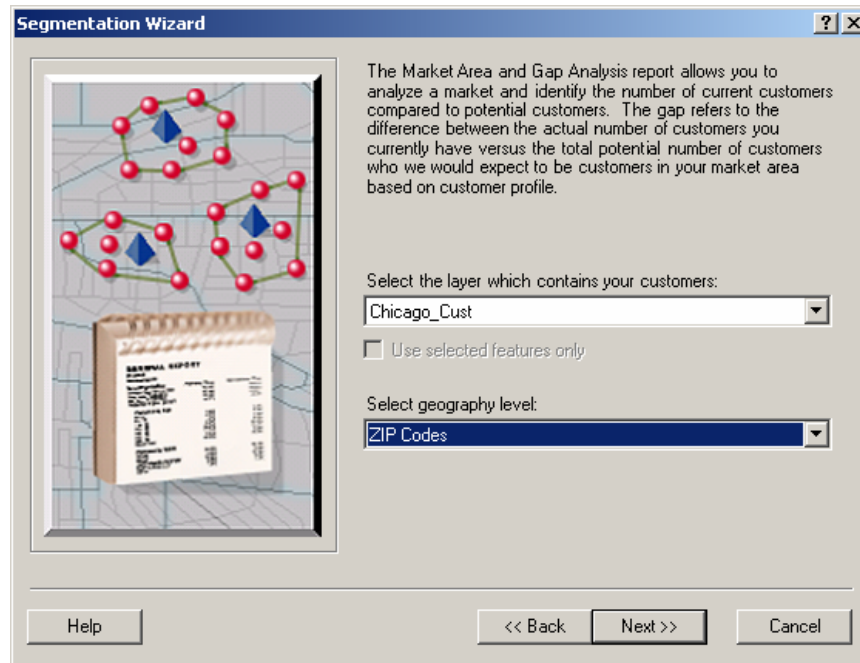
### Option 7 – Market Area and Gap Analysis

Use this report to analyze where there are concentrations of your target segment(s) customers and households in any market. Using this report you can analyze a market by displaying total households, percent Core households, percent Developmental households, actual customers, customer penetration, expected customers, and the gap. Based on your customer profile and the Tapestry composition of the geography, Business Analyst is able to identify the number of customers you should expect for any geography. Then you can calculate the gap, which is the difference between actual customers minus expected customers. Geographies with large negative gap should be targeted for further marketing and expansion.

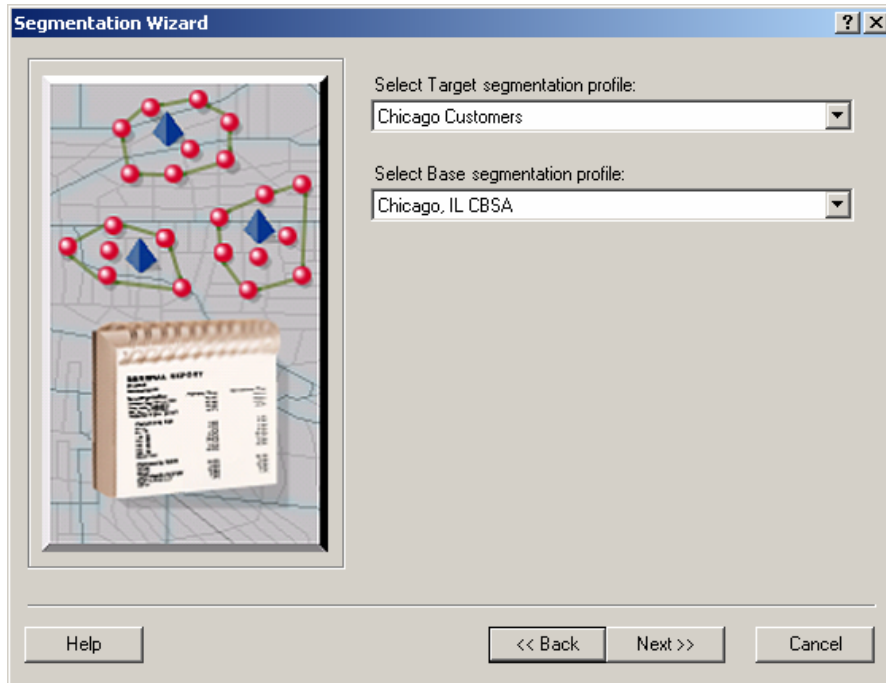
The first step to running this report is to go to the *Customer Setup* option from your main Business Analyst dropdown menu and either select to *View an existing Customer Layer* or *Create a new Customer Layer* (see Using ArcGIS Business Analyst guide for instructions on creating a new customer layer). Next, zoom to the market area you would like to analyze. The geographies listed on this report will be based on the extent of the current map view.



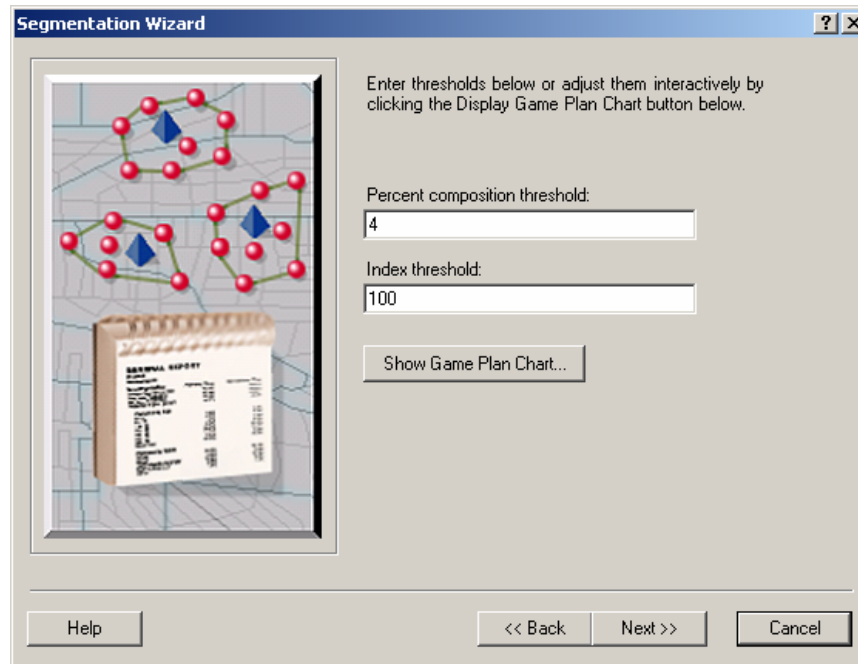
On the *Create segmentation report* wizard select the customer layer you would like to use from the drop-down menu of customer layers displayed in your existing Business Analyst project. Next, select the geography level you would like to analyze. By selecting ZIP Codes, the *Market Area and Gap Analysis Report* will display customer and demographic data for all ZIP Codes in your current view extent. Once you have selected the desired geography level, click Next.



Next, select a target segmentation profile from an existing customer or survey profile listed in the drop-down menu. This target profile will be used to calculate the percent composition for each segment that will be used to determine your Core and Developmental target segments. Then, select a base segmentation profile from the drop-down list of existing profiles. The base profile will be used to calculate the index used to identify Core and Developmental target segments. In most cases the base profile you select should be the geographic area from where you draw close to 100% of your customers. Once you have selected the desired target and base segmentation profiles, click Next.

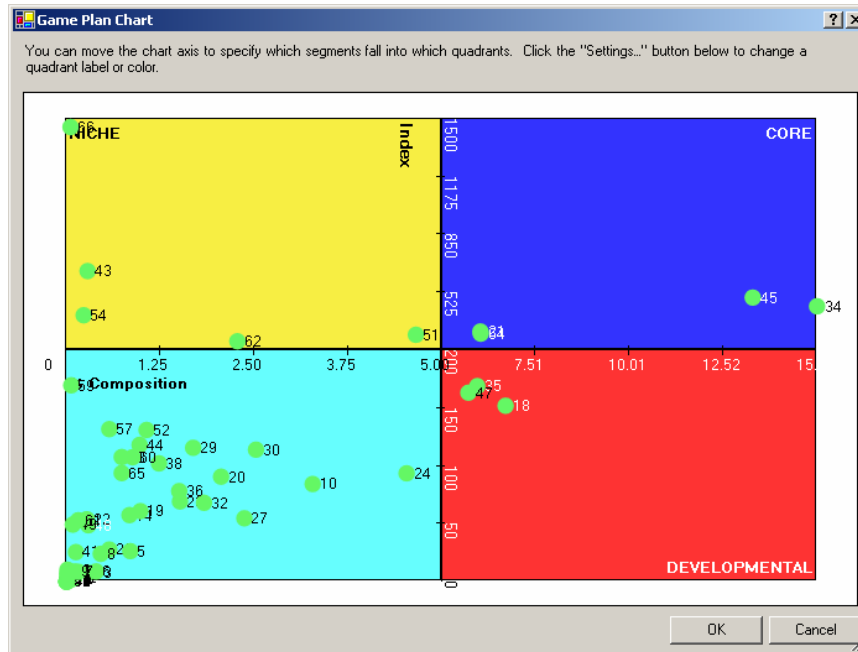


To identify which segments will be included in your Core and which segments will be included in your Development target groups, you will need to set the threshold percent customer composition and threshold index. The default value for the *Percent composition threshold* is 4 percent which means only segments that make up at least 4.0% of total customers will be included in your Core and Developmental Target Groups. The default value for the *Index threshold* is 100 which means only segments that have an index of 100 or greater will be identified as Core segments. Segments with an index less than 100 and greater than 4.0% composition will be defined as Developmental target segments.

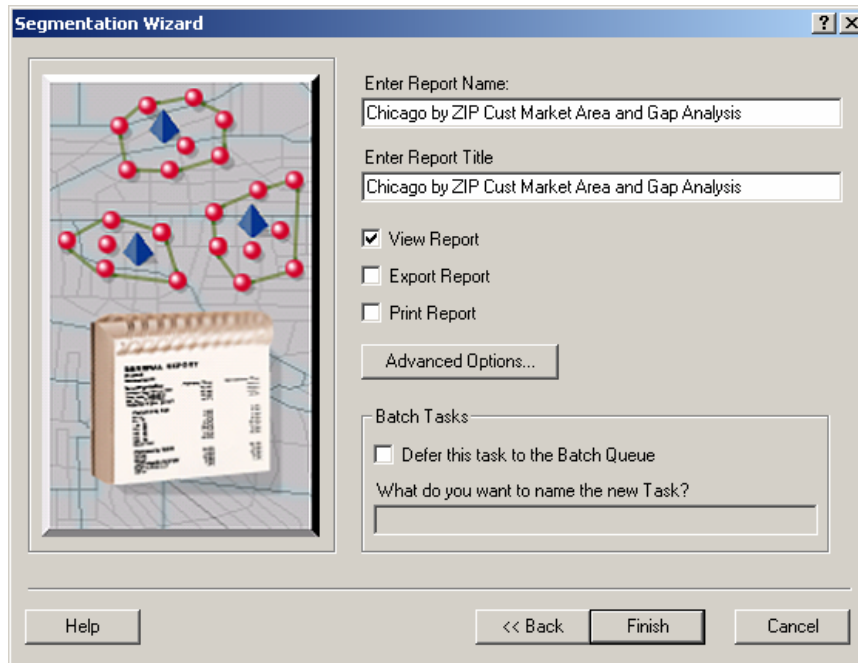




You can also choose to set these threshold values interactively using a Game Plan Chart. Click the *Show Game Plan Chart* button to display a Game Plan Chart with center line values set to the current threshold values and then adjust the center lines to set the desired % Composition and Index values and click OK.



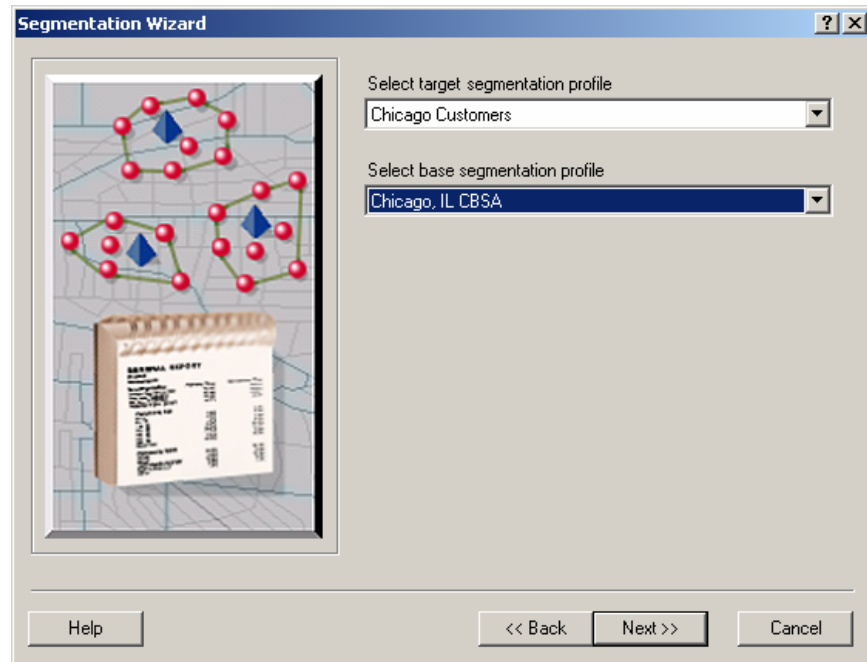
Enter a Report Name and Report Title in the text boxes. These should be descriptive of the profiles and market area selected to create this report. *View Report* is the default option which displays the finished report in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your reports and selected the desired options, click Finish.



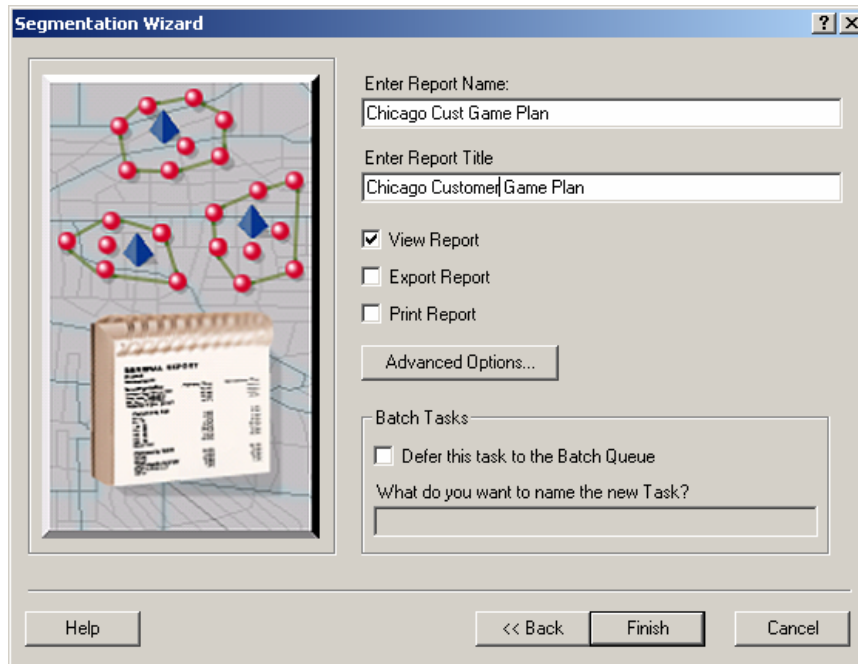
### Option 8 – Game Plan Chart

Use this report option to identify your Core, Developmental and Niche target groups based on an existing customer profile you have created using *Create Profiles* in Business Analyst. It is best to create the Game Plan Chart using the *Segmentation Chart* option since this *Game Plan Chart Report* will automatically calculate the center line values on the x and y axes.

The first step in creating a Game Plan Chart is to select a target segmentation profile from an existing customer or survey profile listed in the drop-down menu. This target profile will be used to calculate the percent composition in the Game Plan Chart for each segment. The percent composition for a segment is calculated by taking the number of customers who are in the segment and dividing it by the total number of customers in the overall customer profile being used. The second step is to select a base segmentation profile from the drop-down list of existing profiles. The base profile will be used to calculate the index in the Game Plan Chart for each segment. In most cases, the base profile you select should be the geographic area from where you draw close to 100% of your customers. Once you have selected the desired target and base segmentation profiles, click Next.



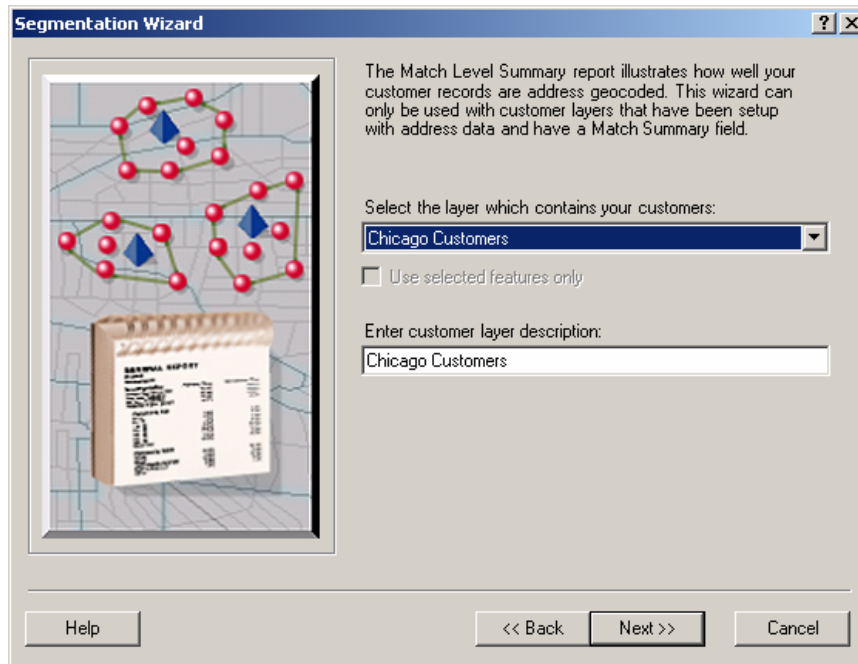
Enter a Report Name and Report Title in the text boxes. These should be descriptive of the profiles selected to create this report. *View Report* is the default option which displays the finished report in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your reports and selected the desired options, click Finish.



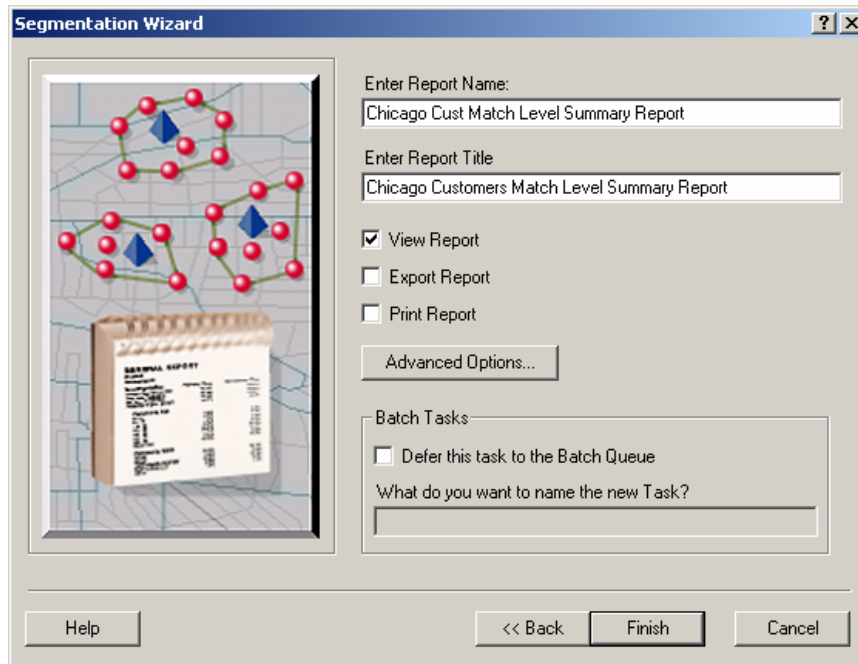
### Option 9 – Match Level Summary Report

Use this report option to better understand how well your customer records are address geocoded. The cleaner the address information on your customer table, the more accurately Business Analyst is able to assign your customers to the correct geocode. This geocode is what the segment code and demographic characteristic assignments are based on, therefore it is important to understand how well Business Analyst was able to assign this geocode.

The first step to running this report is to go to the *Customer Setup* option from your main Business Analyst drop-down menu and either select to *View an existing Customer Layer* or *Create a new Customer Layer* (see Using ArcGIS Business Analyst guide for instructions on creating a new customer layer). Then select the customer layer you would like to use from the drop-down menu of customer layers displayed in your existing Business Analyst project. Enter the desired customer layer description and click Next.



Enter a Report Name and Report Title in the text boxes. These should be descriptive of the customer layer selected to create this report. *View Report* is the default option which displays the finished report in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your reports and selected the desired options, click Finish.



## Segmentation maps

Use this option to create segmentation maps with your customer data, profiles, and target groups to help you better understand and target your best customers. There are three segmentation maps available:

### Target Map

Thematically shades geographies either red or yellow depending on whether there is at least one or more adults or households in the geography that are in the target segment group. This map gives you a quick snap shot of where there are concentrations of your target segments.

### Target Penetration Map

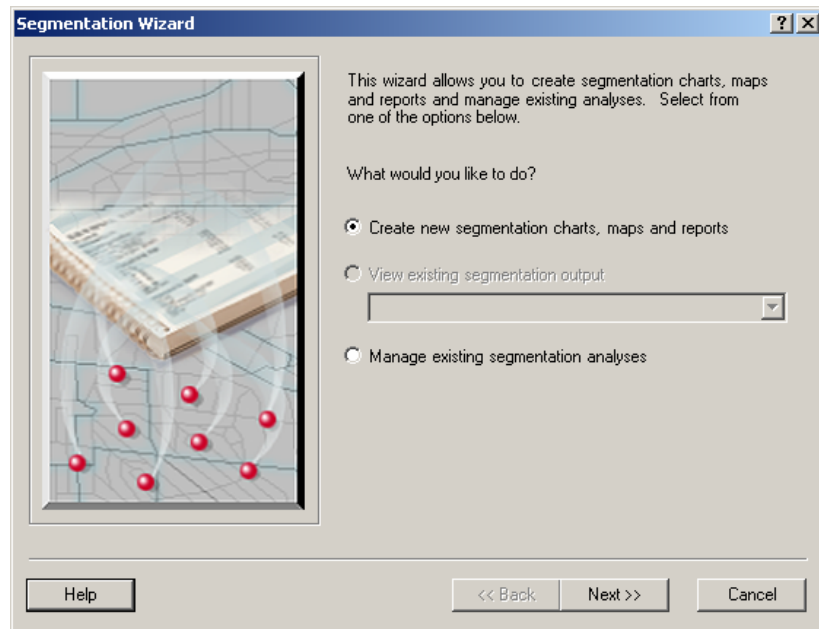
Similar to the Target Map except that instead of thematically shading geographies one of two colors, thematically shades geographies based on the percent penetration of target adults or households in the geography. The map gives you more detail regarding the concentrations of your target segments.

### Four Quadrant (Game Plan) Map

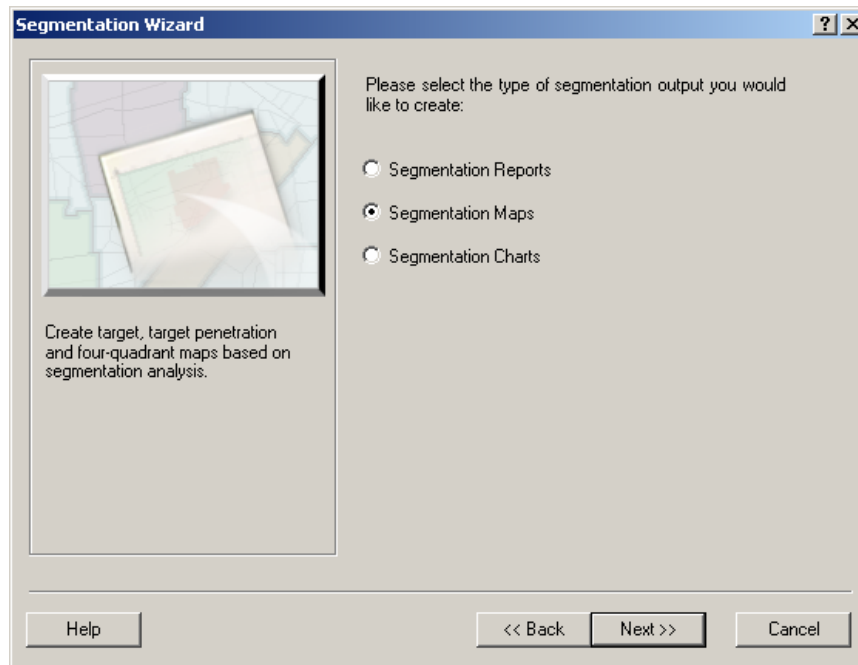
Also similar to the Target Map except that instead of thematically shading geographies one of two colors, thematically shades the geographies based on the four colors representing the target groups represented as each quadrant on the game plan chart.

### How to Create Segmentation maps

1. Select Segmentation, Segmentation reports, maps and charts from the Business Analyst Drop-down main menu
2. Chose *Create new segmentation charts, maps, and reports* and click Next.

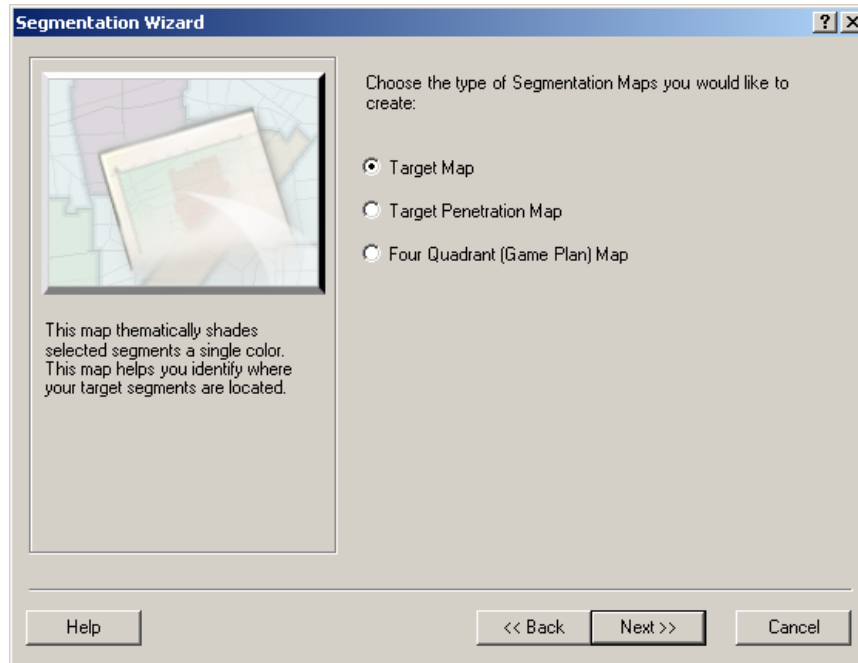


3. Select *Segmentation Maps* and click Next.



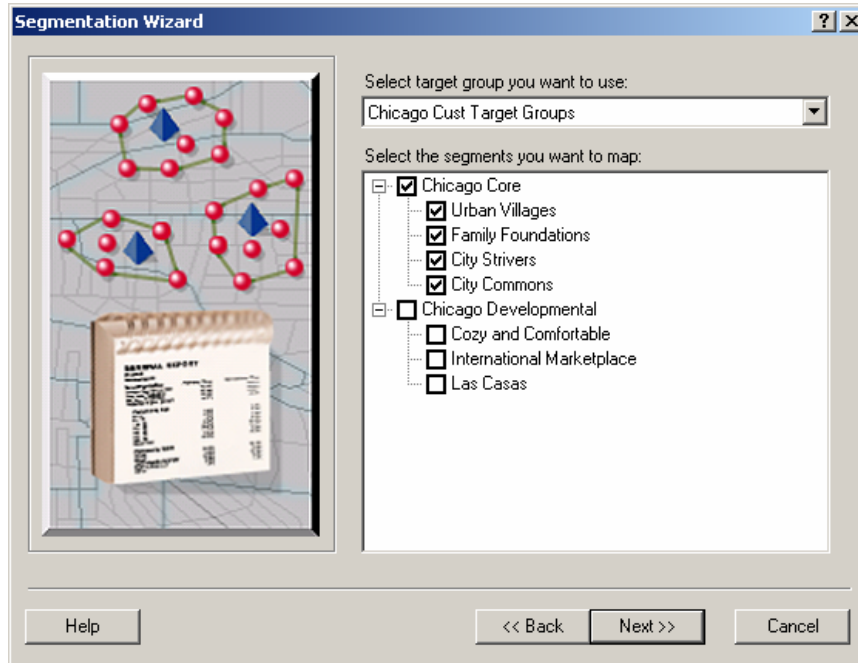


4. Highlight the map you would like to create and click Next.



### Option 1 – Target Map

The first step to creating a Target Map is to zoom to the market area you would like to analyze. Only the geographies within the current map extent will be analyzed and thematically shaded. From the wizard screen below, select the target groups from the drop-down menu of available target groups. Next, select the segments you want to target by checking the box next to the segment name. By checking the Target Group, all segments in that group will be selected. Once the desired target segments are selected, click Next.



Select the mapping layer to be thematically shaded from the drop-down list of available options. The geography level you select here will be the one that is displayed and analyzed for concentrations of target segments. Select either Total Households or Adults from the drop-down menu to be used as the base for the target segments. Then check the box below to create a report of the results and/or to create a mapping layer to be added to the Business Analyst display. Once you have selected the desired options, click Next.

Segmentation Wizard

Choose the layer containing the segmentation data.

Select mapping layer:  
ZIP5

Select segmentation base:  
Total Households

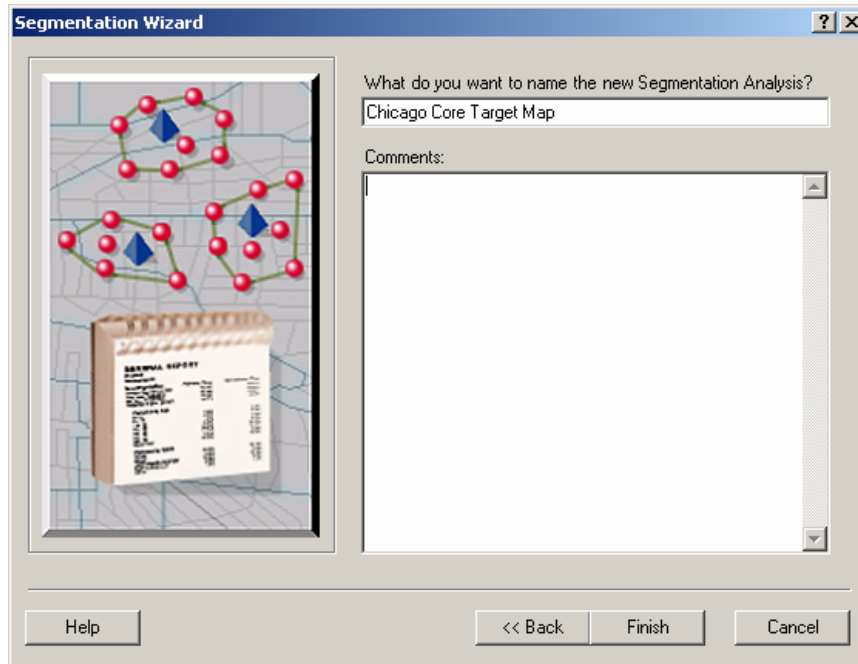
Select the type of segmentation map output:

Create segmentation mapping report

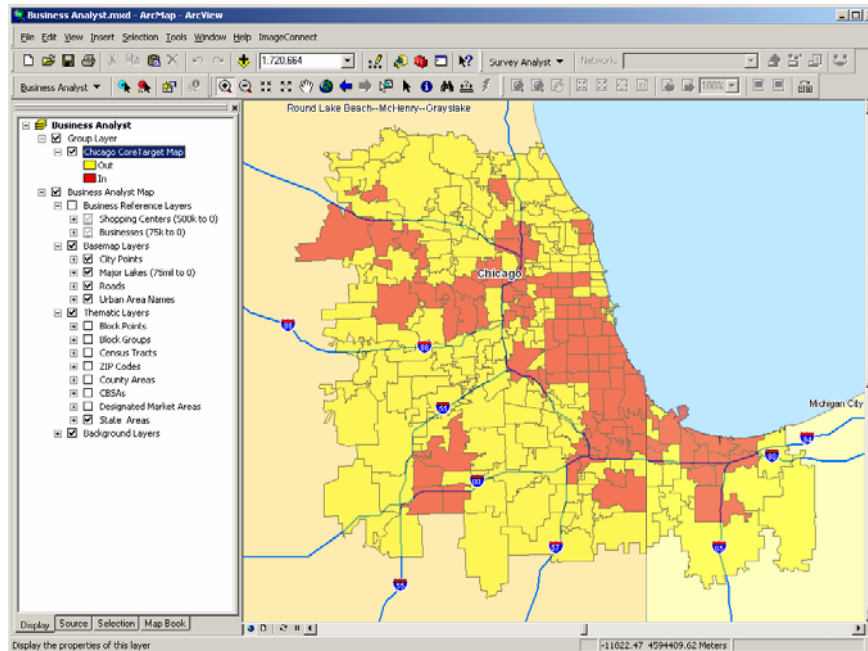
Create segmentation mapping layer

Help << Back Next >> Cancel

Enter a map name in the text box. The name should be descriptive of the target segments and market area selected to create this map. Click Finish to create the Target Map.

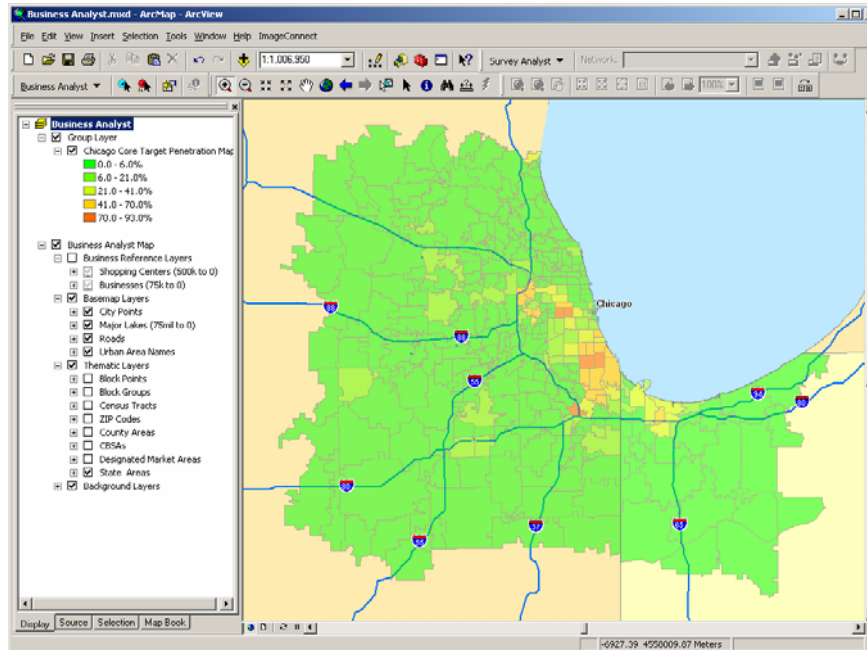


If you selected to create a map layer, it will automatically be to the Business Analyst display. Geographies that contain target segment households are shaded red and geographies that contain no target segment households are shaded yellow.



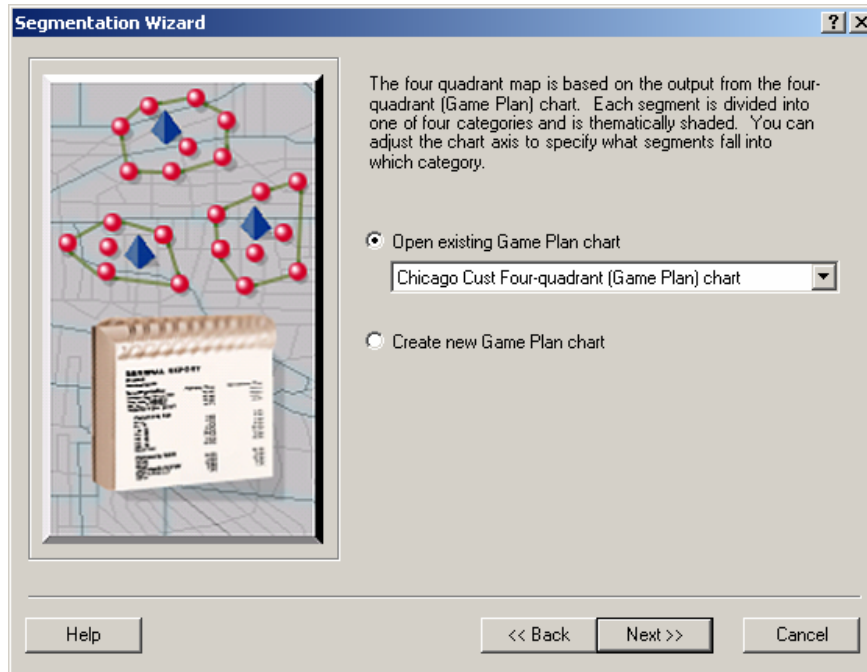
## Option 2 – Target Penetration Map

Follow the same steps to create a Target Map above. As you can see below, the geographies in this map are thematically shaded one of five colors based on the percent penetration of target segment households or adults.

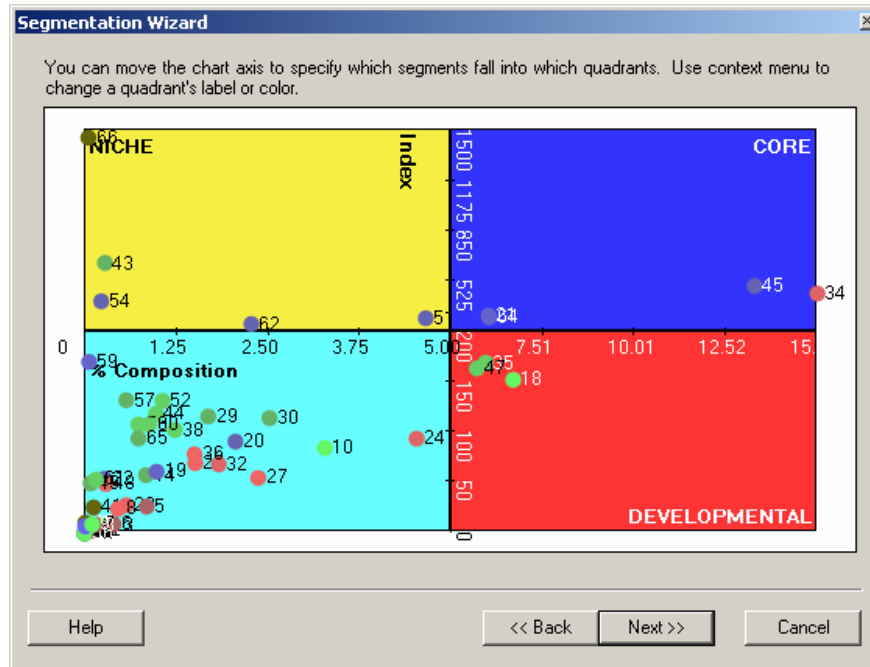


### Option 3 – Four Quadrant (Game Plan) Map

The first step to creating a *Four Quadrant (Game Plan) Map* is to create a *Game Plan Chart*. You can choose a previously created Game Plan chart from the drop-down menu of existing Game Plan Charts or you can create a new Game Plan chart to be used for the map.

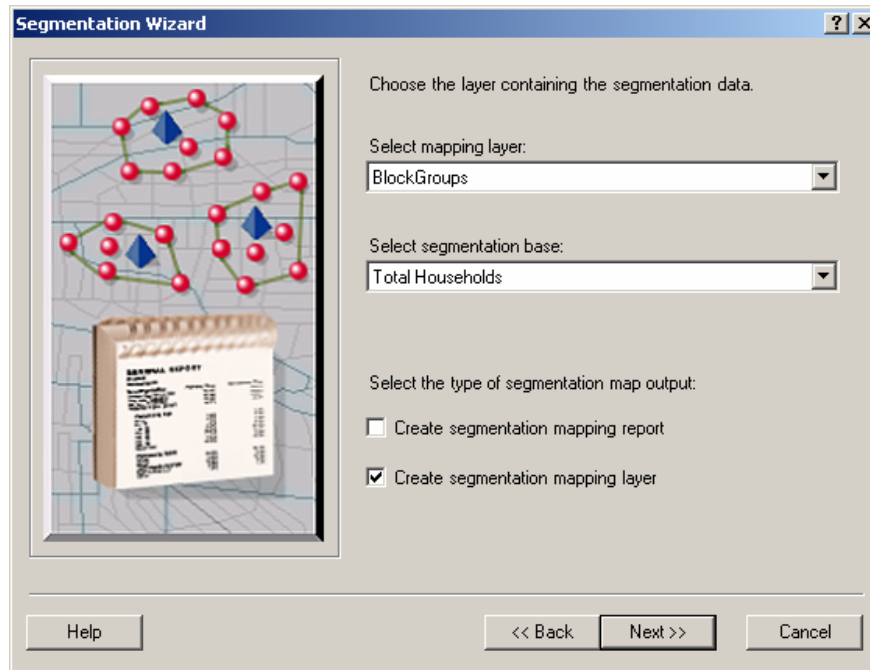


Using the on-screen Game Plan Chart, you can manually adjust your center lines until your target segments are assigned as you desire or just leave the chart as is and click Next.

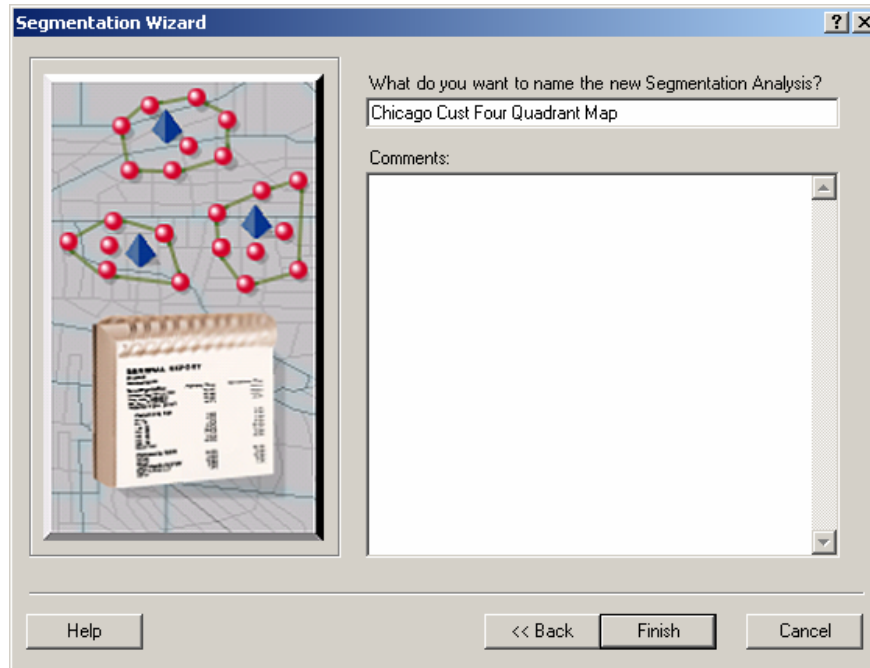




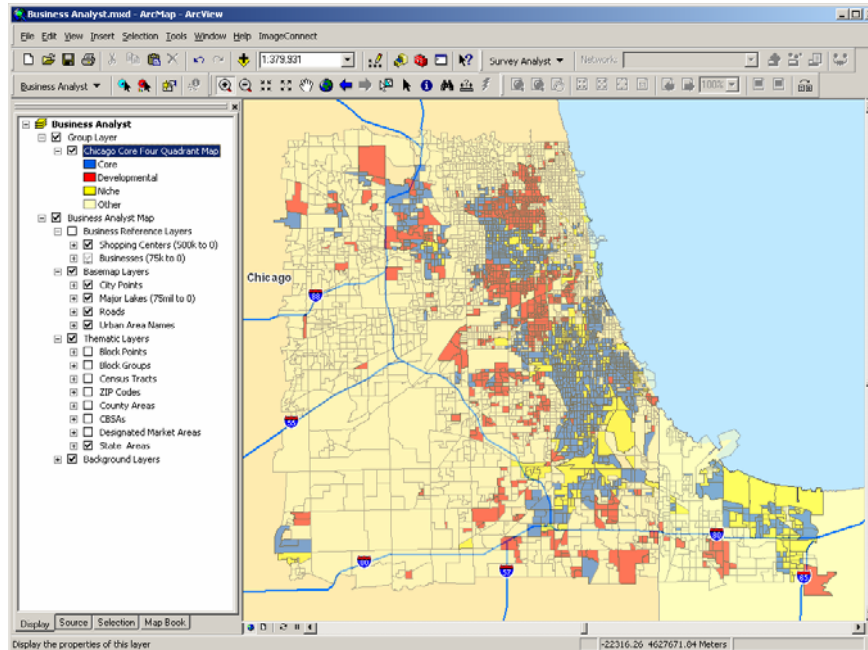
Select the mapping layer to be thematically shaded from the drop-down list of available options. The geography level you select here will be the one that is displayed and thematically shaded based on the target groups identified in the Game Plan Chart selected above. For this map, it is highly recommended that you select *BlockGroups* as these are the lowest level of geography and will provide you with the best targeting. If your market area is large, this can take a long time to process. Select either Total Households or Adults from the drop-down menu to be used as the base for the target segments. Then, check the box below to create a report of the results and/or to create a mapping layer to be added to the Business Analyst display. Once you have selected the desired options, click Next.



Enter a map name in the text box. The name should be descriptive of the target segments and market area selected to create this map. Click Finish to create the *Four Quadrant Map*.



If you selected to create a map layer, it will automatically be added to the Business Analyst display. Geographies that contain target segment households are shaded one of four colors based on which target group the households or adults within the geography fall.



## **Segmentation charts**

Use this option to create segmentation charts with your customer data, profiles, and target groups to help you better understand and target your best customers. Using an existing customer profile you have created using *Create Profiles* in Business Analyst, create a chart that plots the segments based on their customer percent composition and their index and identify your Core, Developmental, and Niche target groups. There are three segmentation charts available:

### **Profile comparison bar chart**

The first chart type is the *Profile comparison bar chart*. This chart displays all 66 Tapestry segments as bars on a chart, where the length of each bar varies based on the value of the customer profile index for each segment and the width of the bar varies based on percent penetration of the customer profile for each segment. The center of the bar chart is always set to 100 since an index of 100 is average. Segments with indices that are greater than 100 are displayed to the right of center and segments with indices below average are displayed to the left of center on the bar chart.

### **Multi-profile bar chart**

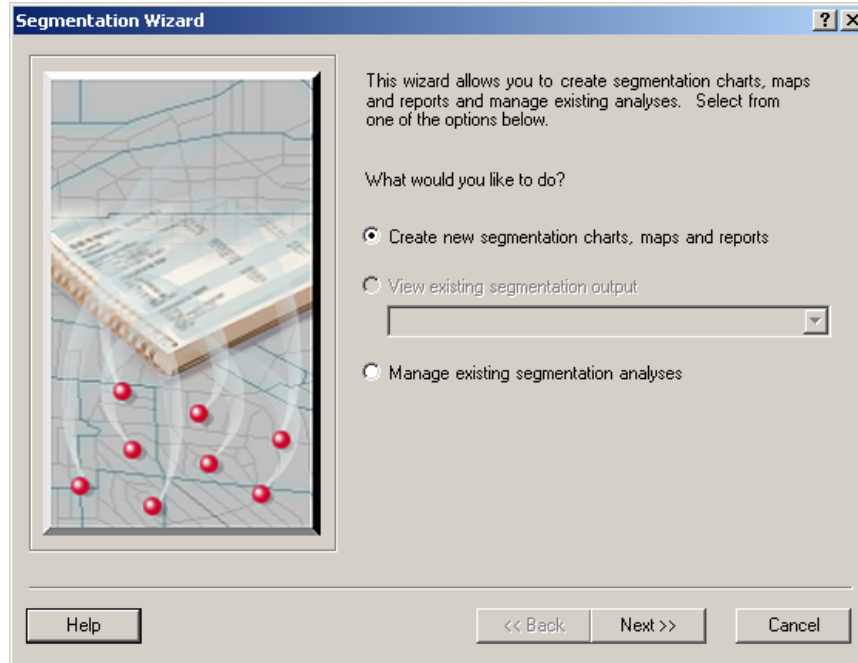
The *Multi-profile bar chart* is the same as the *Profile comparison bar chart* but also allows you to display trend lines for up to 4 additional profiles on top of the bar chart. Use this option if you would like to display the indices for more than one profile on the same chart.

### **Four-quadrant (Game Plan) chart**

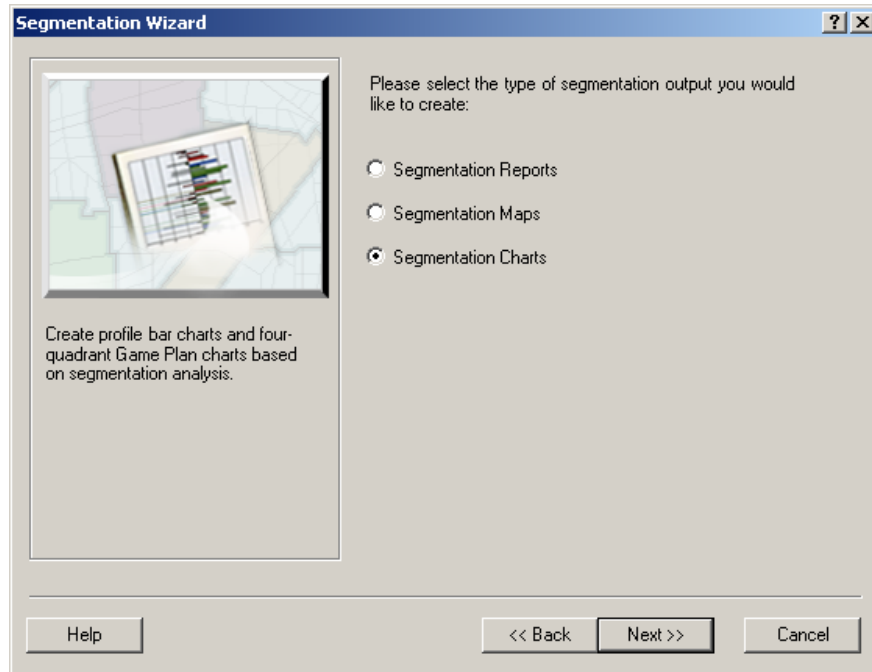
The *Game plan chart* displays all 66 Tapestry segments as a point on an x y chart where the y axis value represents the index of each segment and the x axis value represents the percent composition of the segment. This chart is divided into quadrants where the default center line values are automatically set based on the values in the chart. By manually adjusting the center line values on this chart, you can adjust which segments fall into each of the four quadrants on the chart. Use this chart to easily identify and select Core, Developmental, and Niche customers based on where they fall in the chart.

## How to Create Segmentation Charts

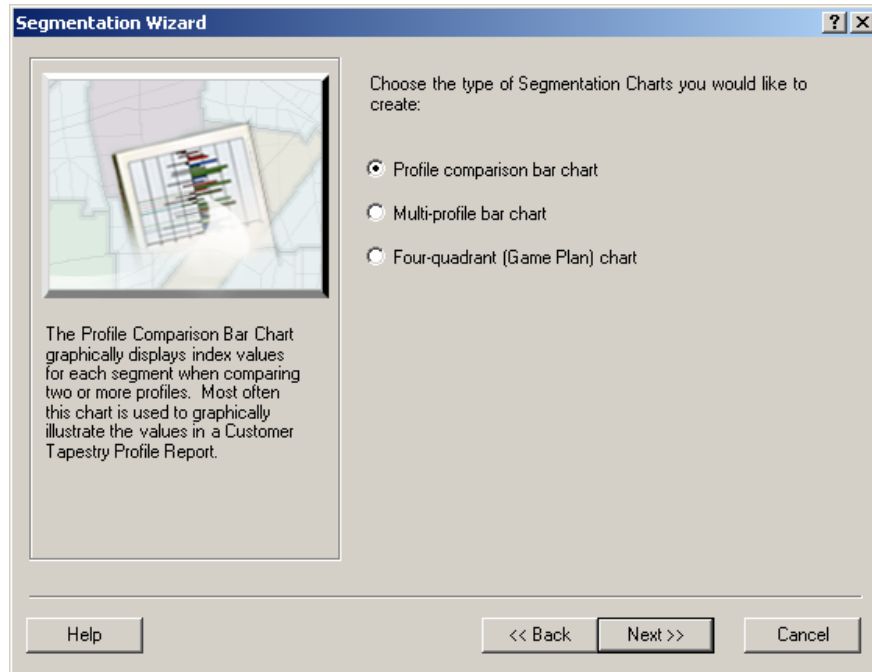
1. Select Segmentation, Segmentation charts, maps, and reports from the Business Analyst Drop-down main menu
2. Choose *Create new segmentation charts, maps, and reports* and click Next.



3. Select *Segmentation Charts* and click Next.

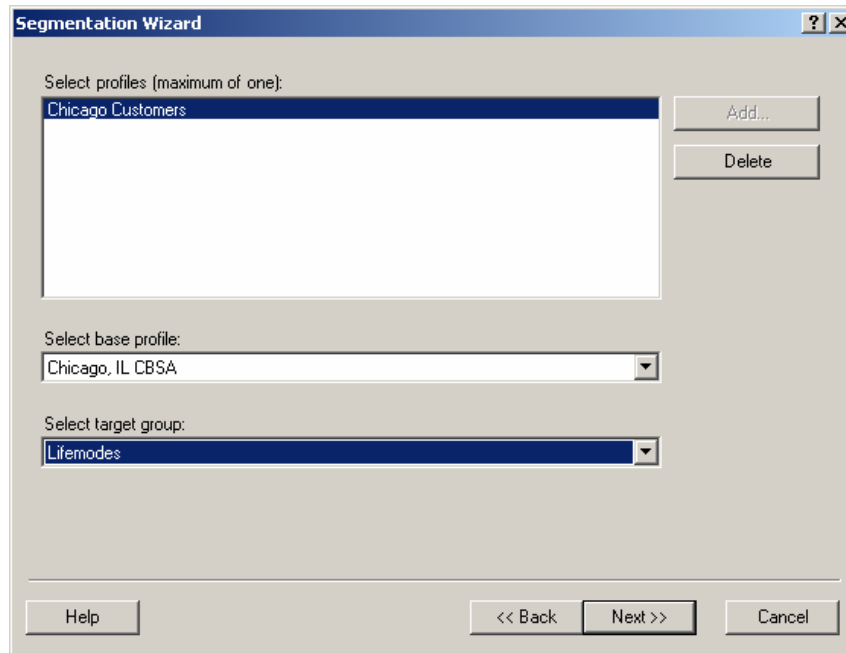


4. Highlight the map you would like to create and click Next.



### Option 1 – Profile comparison bar chart

Click the *Add* button and highlight the profile you would like to add from your existing profile list and click the *Select* button. To delete the profile from the window, highlight the profile and click the *Delete* button. Next, select the base profile from the drop-down list of existing profiles that you would like to use to compare to your customers. Every profile must have a base profile to compare against. The base profile you select here will be used to calculate the indices on the bar chart. For this example, we will select the Chicago, IL CBSA because almost all customers in the Chicago Customers profile example are from the Chicago-Naperville, IL CBSA. Finally, select a target group from the list of existing target groups. The target group selected will be used for display purposes and can be used as a sorting option for the charts. For this example, leave the default of *Lifemodes* and click Next.

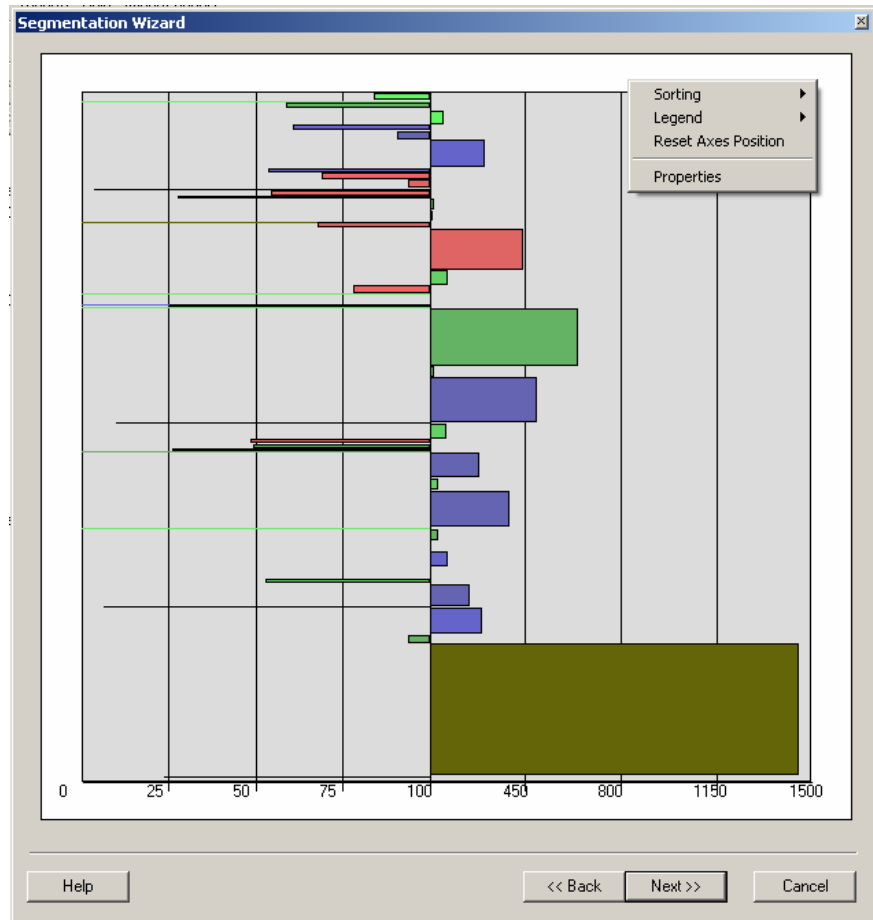




Expand the display window so that you can better view the chart. The chart displays all 66 Tapestry segments as bars on a chart, where the length of each bar varies based on the value of the customer profile index for each segment and the width of the bar varies based on percent penetration of the customer profile for each segment.

The center of the bar chart is always set to 100 since an index of 100 is average. Segments with indices that are greater than 100 are displayed to the right of center and segments with indices below average are displayed to the left of center on the bar chart.

The bars are shaded based on the target group they fall into. By clicking your right mouse button while your cursor is on the chart, you can access several options for modifying the chart.

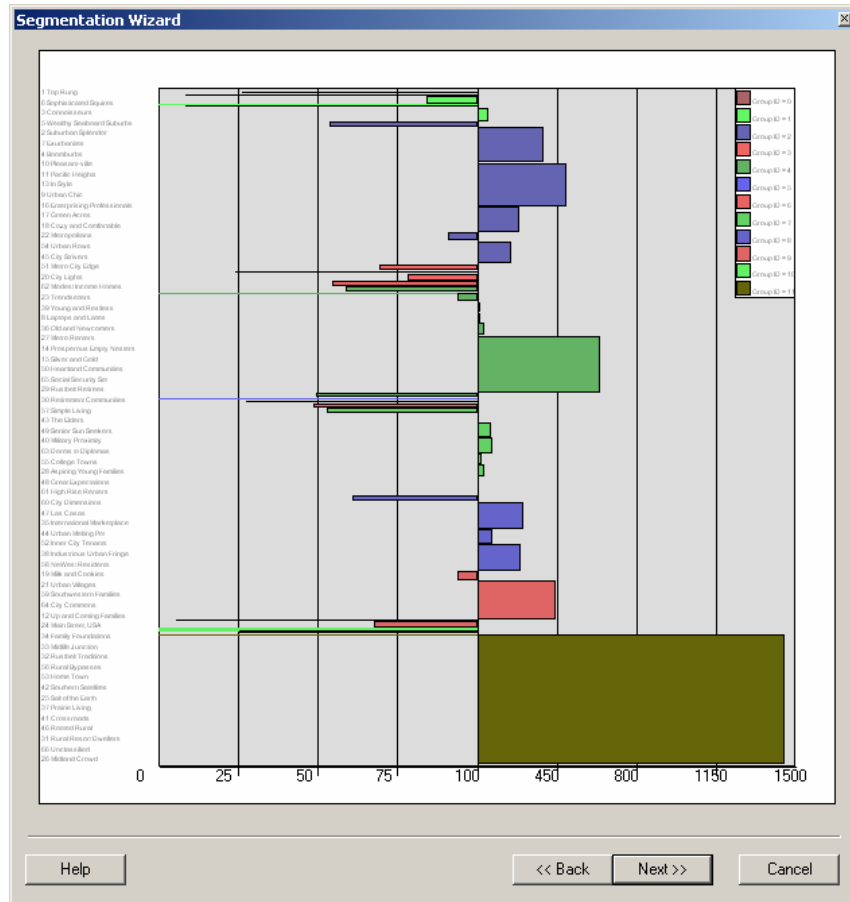


By right clicking and selecting *Sorting, Sort by Group ID, Descending*, you can sort the segments based on the target group they are in.

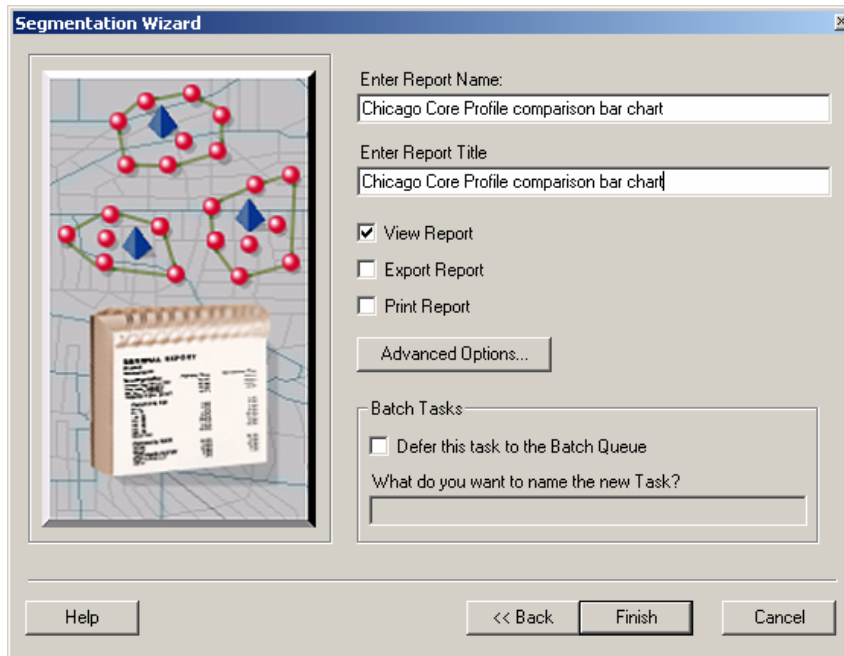
By right clicking and selecting *Legend, Right-top corner*, you can display a legend that displays which groups are associated with the different shading colors.

By right clicking and choosing *Properties*, you can change the colors used for shading the bars and you can choose to display segment labels on the chart.

Once you have adjusted the chart as you desire click Next.



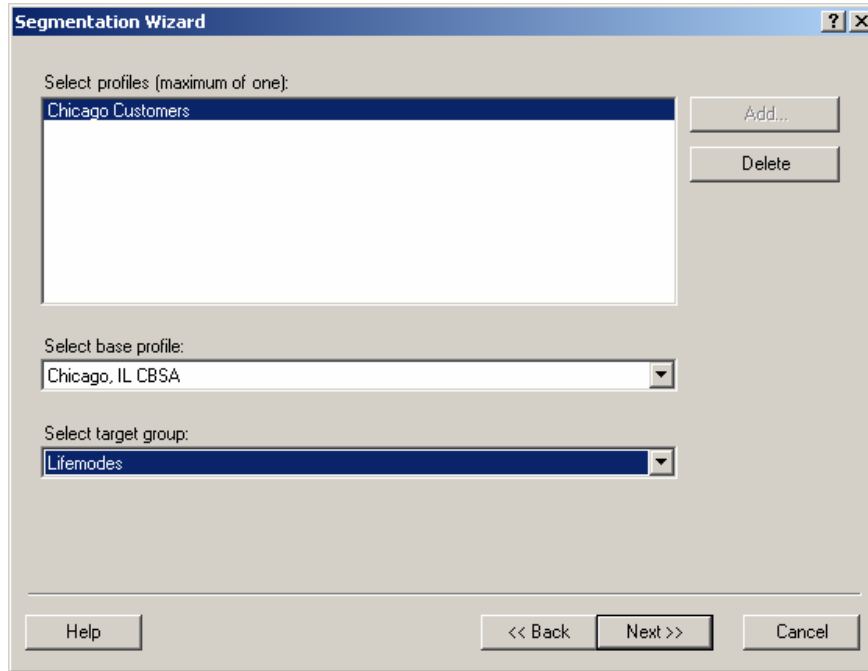
Enter a Report Name and Report Title in the text boxes. These should be descriptive of the profile selected to create this chart. *View Report* is the default option which displays the finished chart in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your chart and selected the desired options, click Finish.



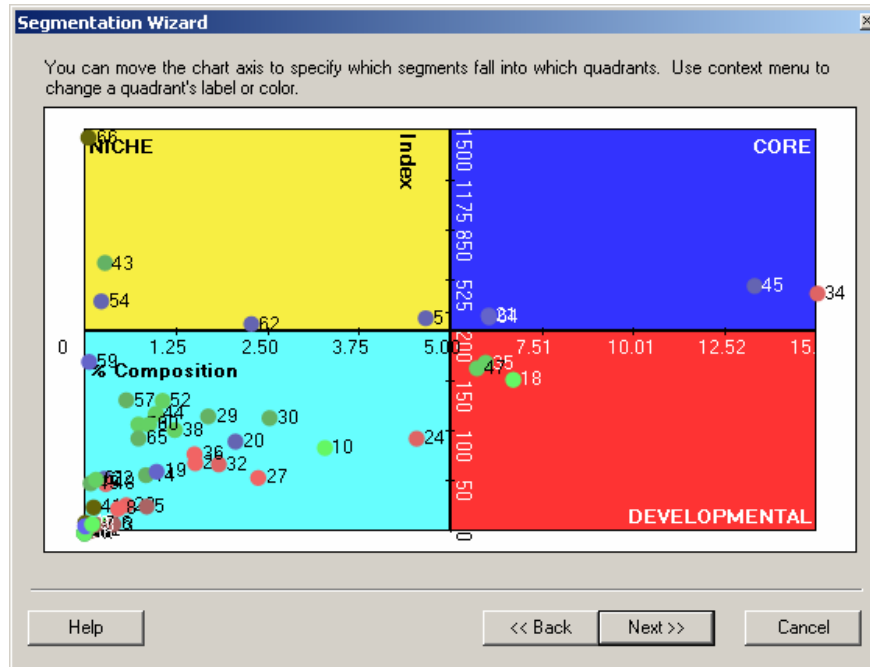


*Option 3 – Four-quadrant (Game Plan) chart*

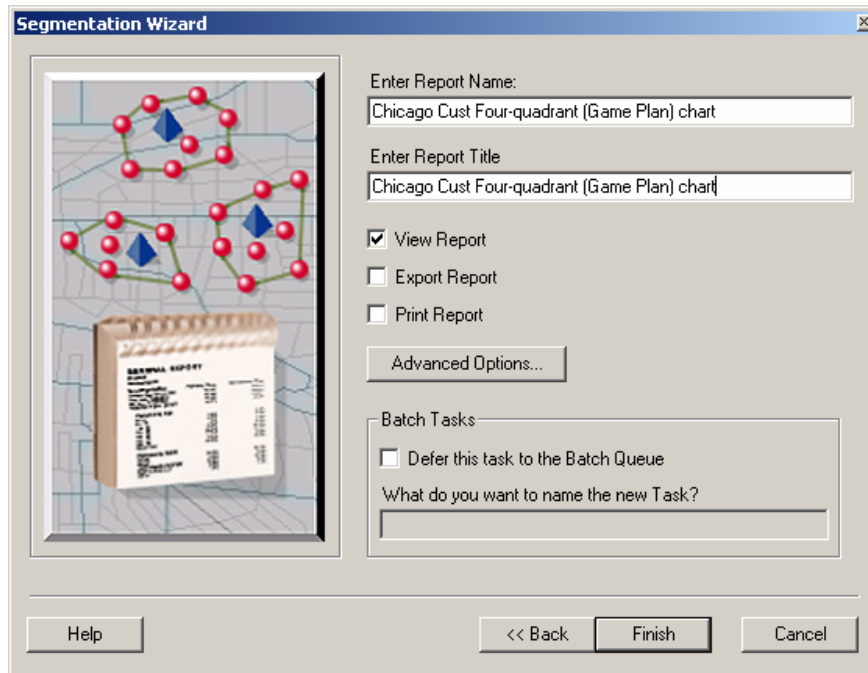
Click the *Add* button and highlight the profile you would like to add from your existing profile list and click the *Select* button. Next, select the base profile from the drop-down list of existing profiles that you would like to use to compare to your customers. Finally, select a target group from the list of existing target groups and click Next.



Using the on-screen Game Plan chart, you can manually adjust your center lines until your target segments are assigned as you desire or leave the chart as is and click Next.



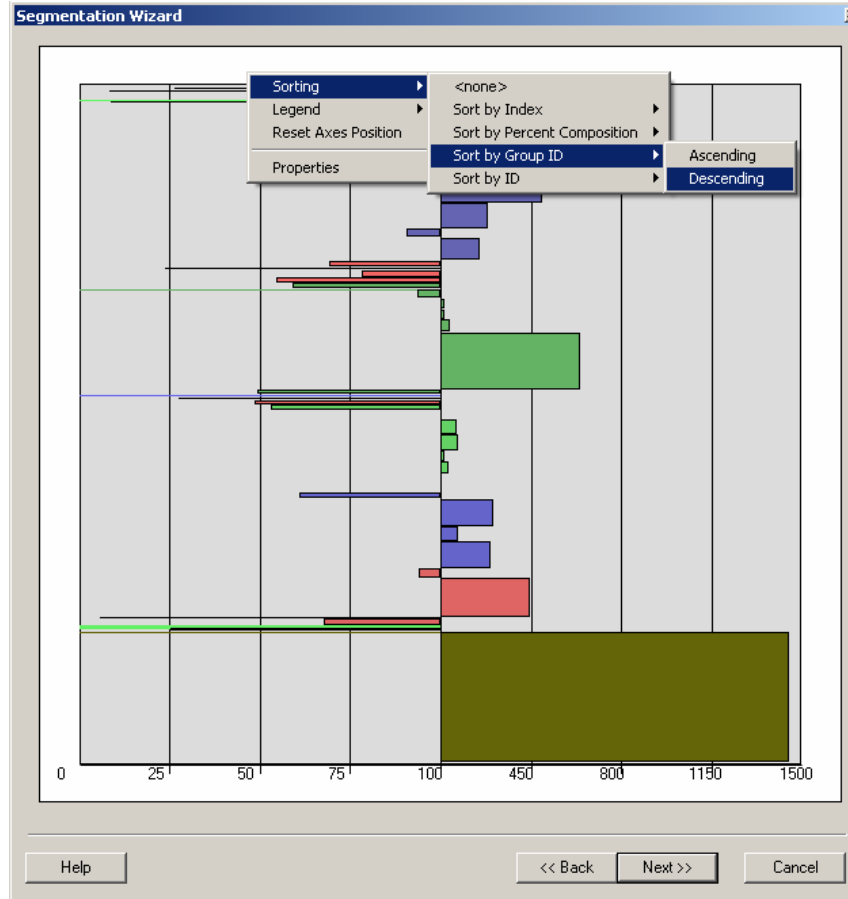
Enter a Report Name and Report Title in the text boxes. These should be descriptive of the profile selected to create this chart. *View Report* is the default option which displays the finished chart in the Business Analyst report viewing software. *Export Report* will export the report to the desired report output as specified using the *Advanced Options* button. *Print Report* will print the report to the default printer as specified in the *Advanced Options* button. You also have the option to save this analysis to run at a later time. Click *Defer this task to the Batch Queue* if desired and give it a batch name. Once you have named and titled your chart and selected the desired options, click Finish.



## How to Change Segmentation Chart Display Properties

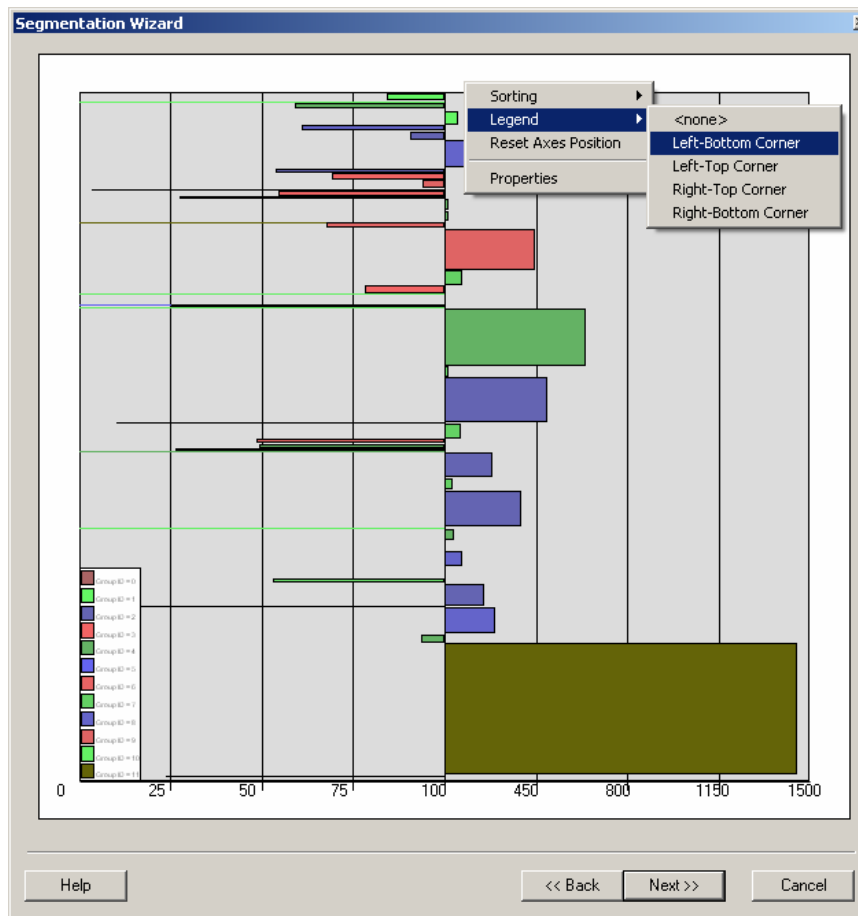
The display properties including sort order, legend display, display color, and legend/label options for each of the three charts can be set by right clicking the mouse on the chart you wish to change and selecting the desired option.

1. The *Sorting* option can be used on either of the bar chart options to change the sort order of the bars on the chart. By default the bar charts are sorted descending by segment ID. You can choose to sort the bars by *Index*, *Percent Composition*, and *Target Group ID* in either ascending or descending order.

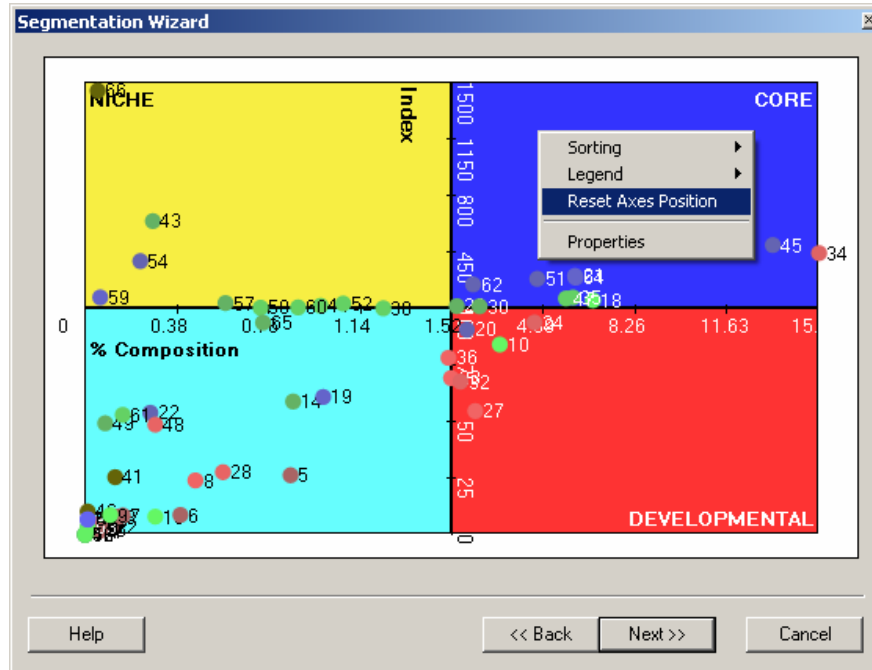




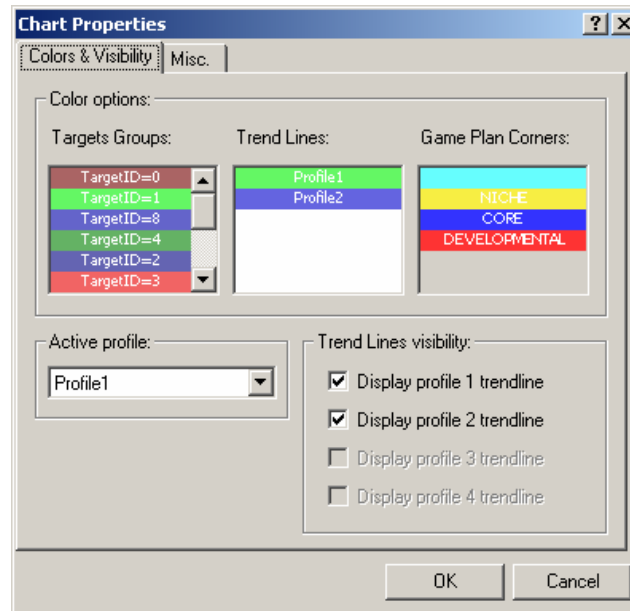
- The legend option can only be used on either of the bar charts to display a legend in any of the four corners of the chart. By right clicking and selecting *Legend*, and then selecting the desired corner, you can display a legend of the target groups.



- The *Reset Axes Position* option is primarily used for the *Game Plan Chart* to reset the % composition axis and index axis to the original default values but can also be used to reset the bar chart index axis to the middle.

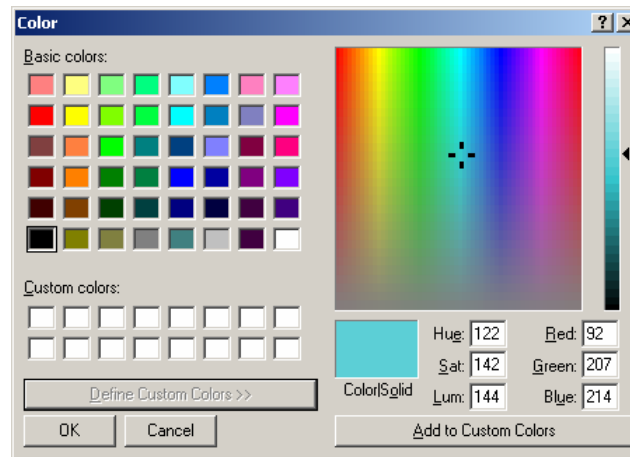


4. The *Properties* option can be used with any of the three charts to change color and visibility settings and to change other miscellaneous options. Some options are specific to a chart type and can only be changed if you are on the chart for which it is applicable. Click your right mouse button on any chart and select *Properties* to access the screen below.

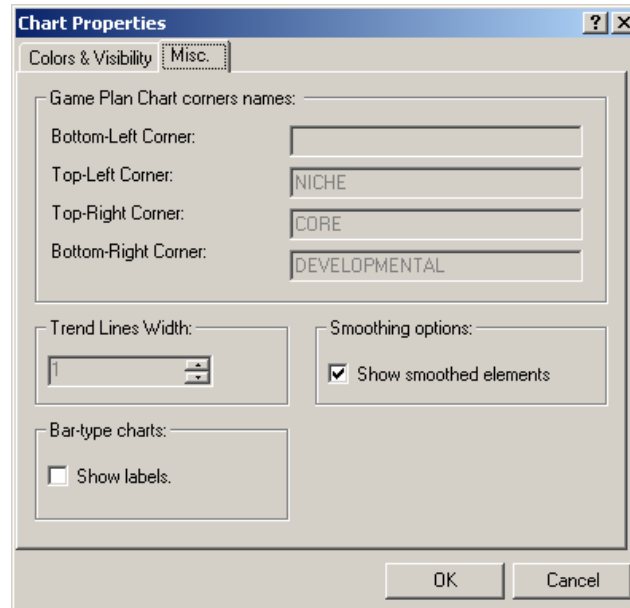


You can reset the colors used to identify each of the target groups for all three charts by double clicking on the *TargetID* and selecting a basic color from the palette or by creating custom colors. Create custom colors by clicking the *Define Custom Colors* button. If you are on a *Multi-profile bar chart*, you can set the trend line colors in the same manner and you can also uncheck the *Display profile trendline* button to remove a specific trend line from the chart. Similarly, if you are on the *Game Plan Chart*, you can change the quadrant colors using this option.

You can create a custom color by clicking the *Define Custom Colors* button, left clicking your mouse in the color spectrum box, and then clicking in the right slider section to set the darkness or lightness. The color created will be displayed in the Color|Solid box and can be added to your *Custom colors* by clicking the *Add to Custom Colors* button.



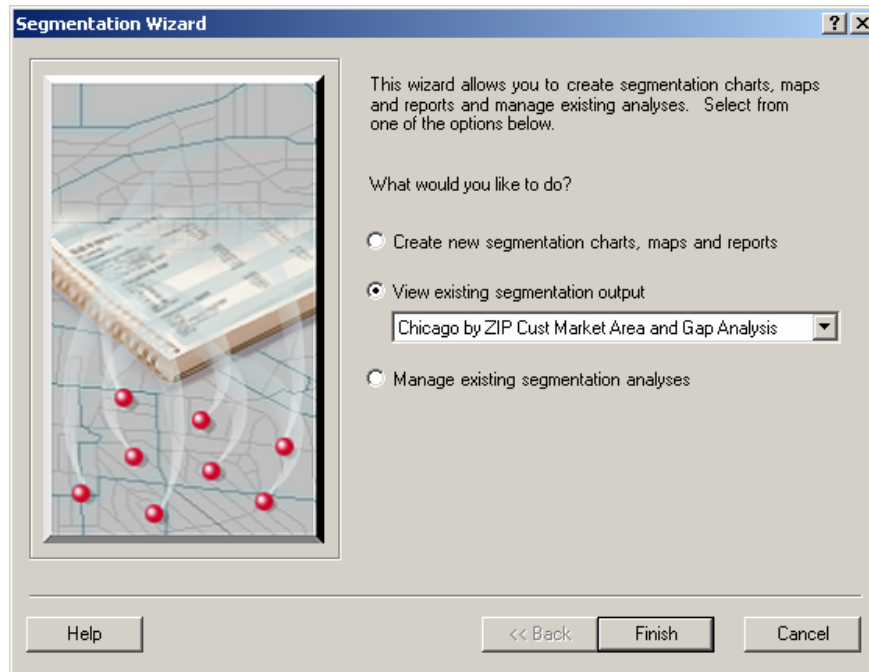
On the *Misc.* tab you can define the quadrant labels on the Game plan chart, you can select to show the segment labels on the bar charts, and you can change the width of the trend lines on a Multi-profile bar chart. Only options that are applicable to the chart being modified can be changed.



## View existing segmentation output

Select this option to view segmentation reports, maps, and charts that you have previously created.

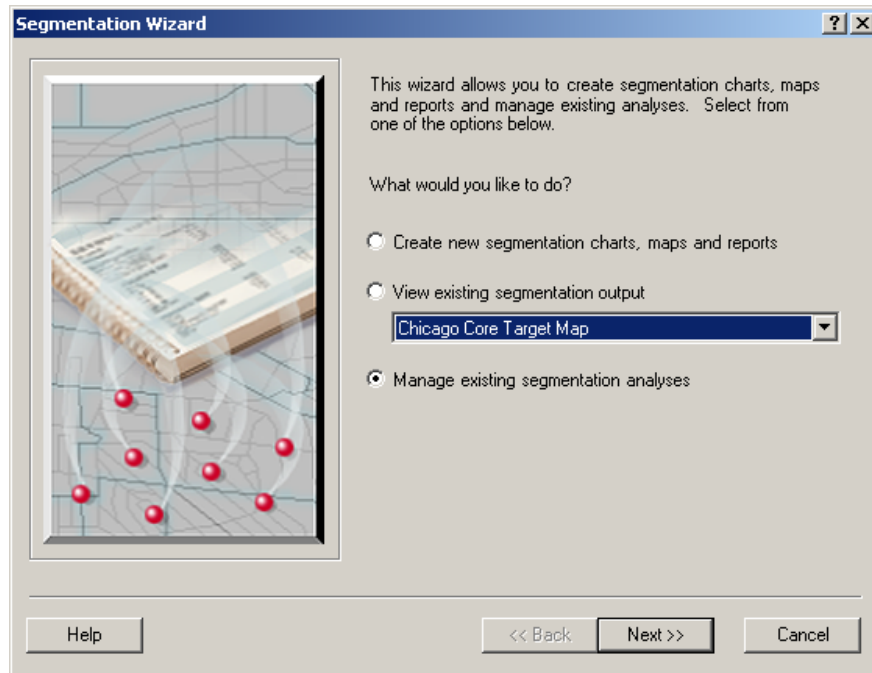
1. Select Segmentation, Segmentation reports, maps and charts from the Business Analyst Drop-down main menu
2. Chose *View existing segmentation output* and select the report, map, or chart you would like to view and click Finish.



## ***Manage existing segmentation analyses***

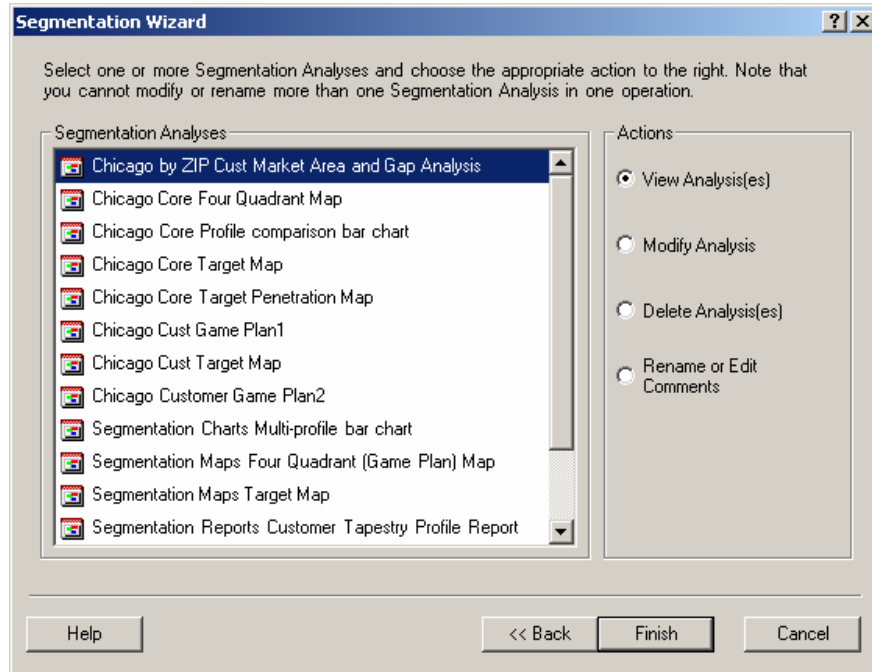
Select this option to view, modify, delete, or rename/edit comments for reports, maps, and charts that you have previously created.

1. Select Segmentation, Segmentation reports, maps and charts from the Business Analyst Drop-down main menu
2. Chose *Manage existing segmentation analyses* and click Next.



## View Analysis(es)

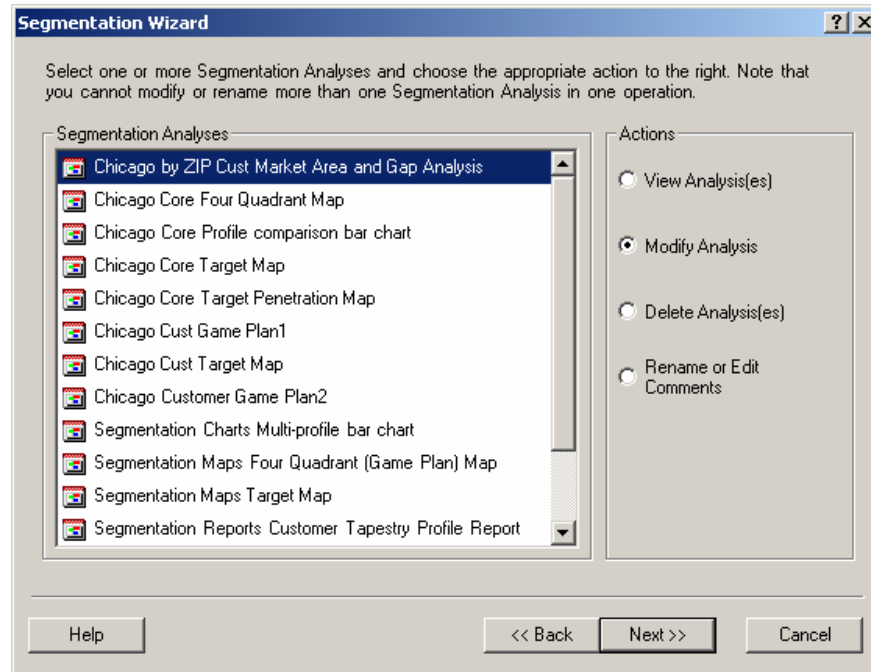
Use this option to view one or many reports, maps, or charts that you have previously created. Select *View Analysis(es)* and click *Finish*.



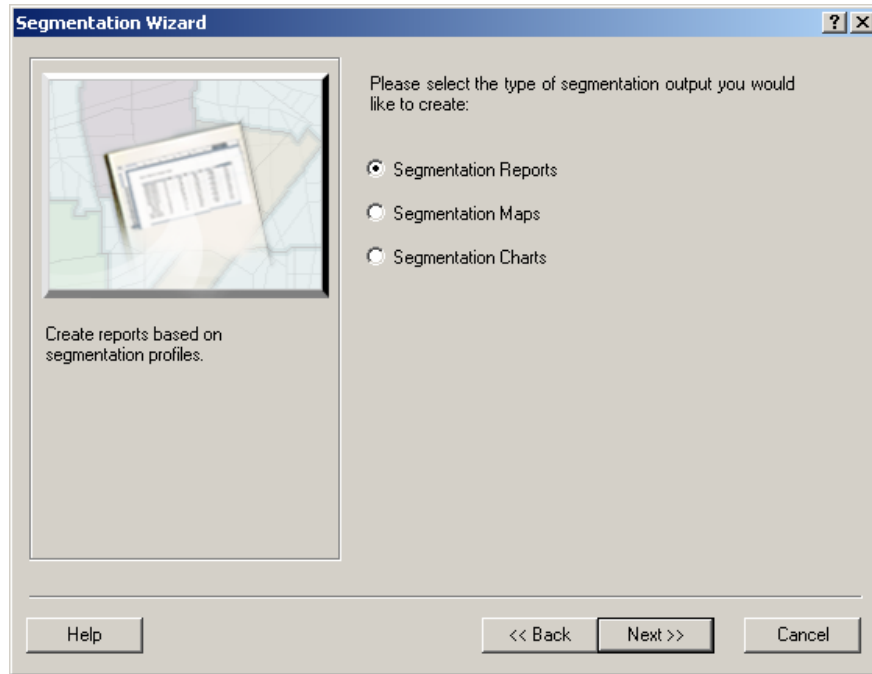


## Modify Analysis

1. Use this option to modify an existing segmentation report, map, or chart by overwriting it with a new segmentation report, map, or chart. Select the report, map, or chart you wish to overwrite, select *Modify Analysis* and click Next.

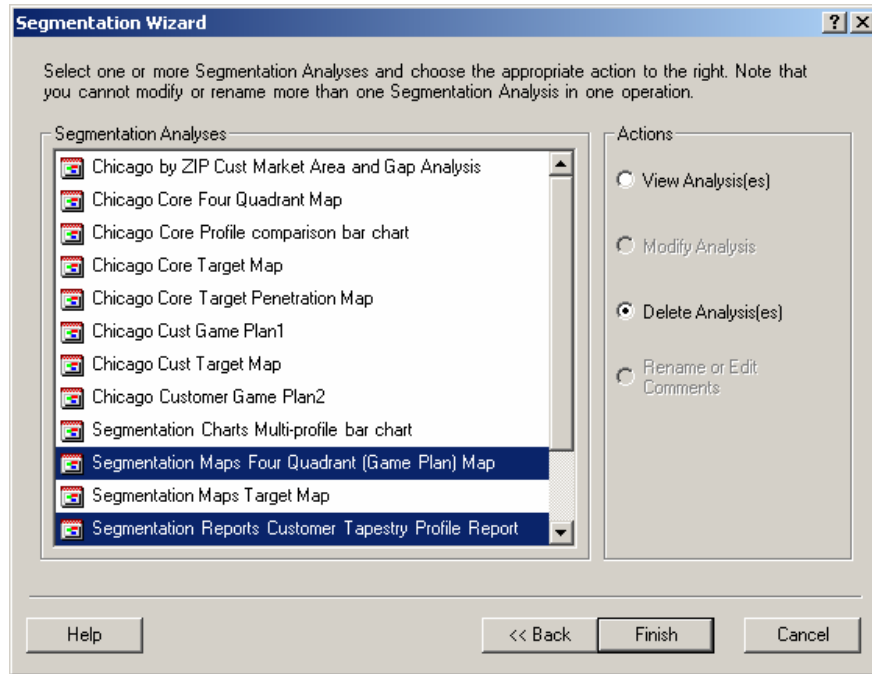


2. Select the option you would like to use to overwrite the existing report, map, or chart you selected. The steps for each of these segmentation analyses creation methods have already been documented under the *Create Segmentation Reports*, *Create Segmentation Maps* and *Create Segmentation Charts* sections of this guide.



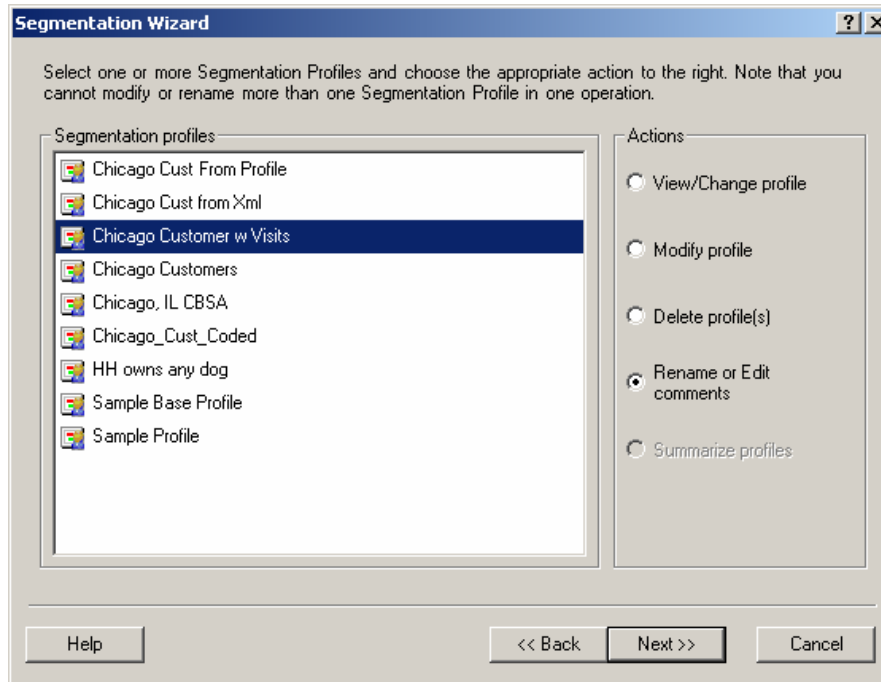
## Delete Analysis(es)

Use this option to delete an existing segmentation report, map, or chart. Select one or many of the segmentation reports, maps, or charts you wish to delete by highlighting them from the list box. Select *Delete* and click Finish.

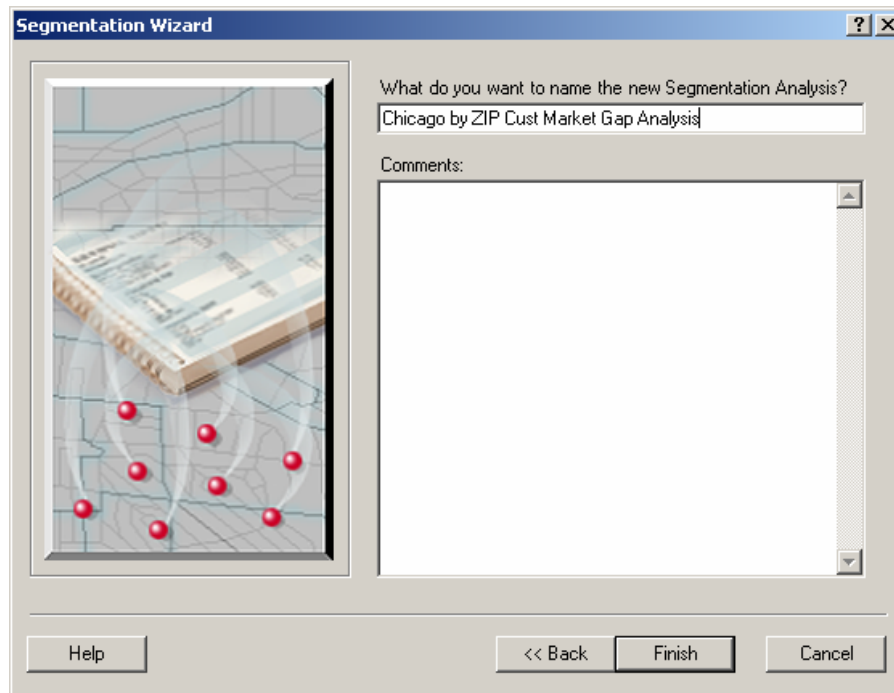


## Rename or Edit comments

1. Use this option to rename an existing segmentation report, map, or chart or to modify the comments associated with a segmentation analysis. Select the report, map, or chart you wish to rename or edit comments by highlighting it from the list box. Select *Rename or Edit comments* and click Next.



2. Edit the segmentation analysis name or comments as desired and click Finish.



## Chapter 5 – Segmentation Study

### IN THIS CHAPTER

- Create a standard segmentation study 158
- Create a custom segmentation study 163
- View an existing study 169
- Manage an existing study 170
- Delete or rename study templates 176

### Create segmentation study booklets

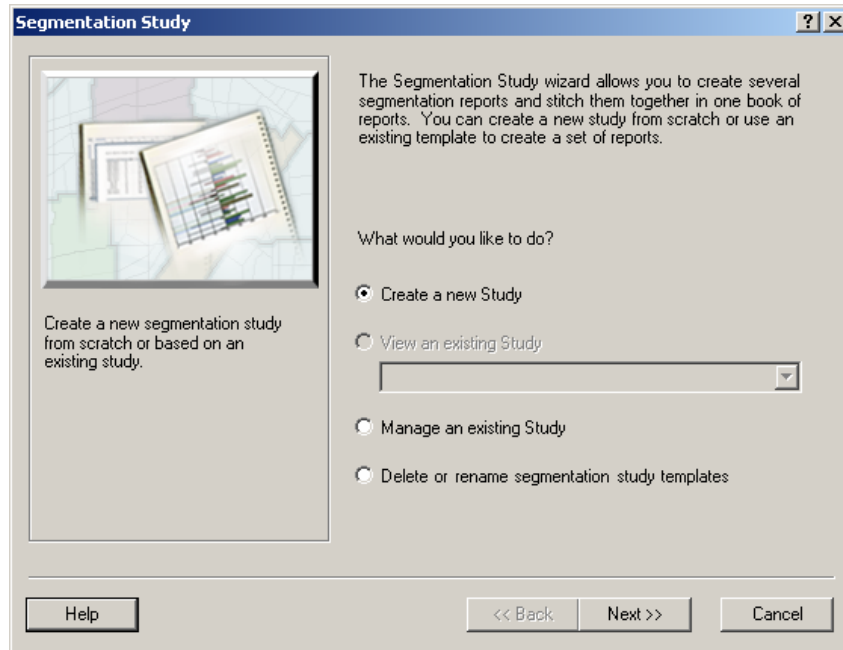
A segmentation study booklet uses your customer layers and customer profiles to create a comprehensive booklet that strings together a series of reports, maps, and charts with descriptive text that walks you through a thorough segmentation analysis.

The segmentation study booklet will help you answer basic questions about your customers and provide specific information that you should include in your business plans. Some of these fundamental marketing questions are: Who are my target customers? Where do they live? What products and services would they buy? What are the most effective strategies to build my customer base? Armed with this basic foundation, you can develop a variety of marketing and site selection tactics to meet your business objectives.

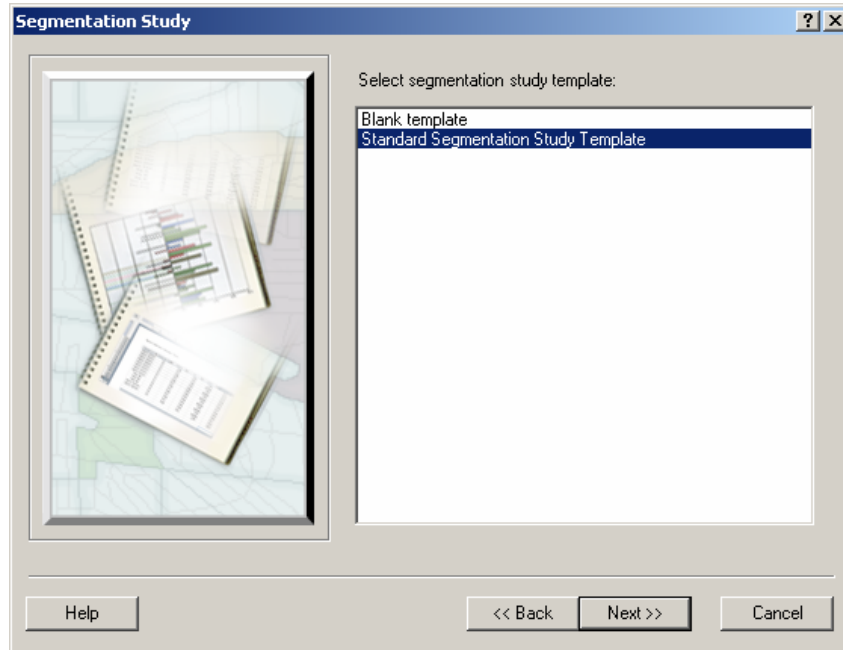
## Create a standard segmentation study

Start by setting your study extent and adding any customer layers to your Business Analysis project window. You will also need to create all target and base profiles you want to use in your segmentation study.

1. Select Segmentation, Segmentation study from the Business Analyst Drop-down main menu
2. Choose *Create a new Study* and click Next.

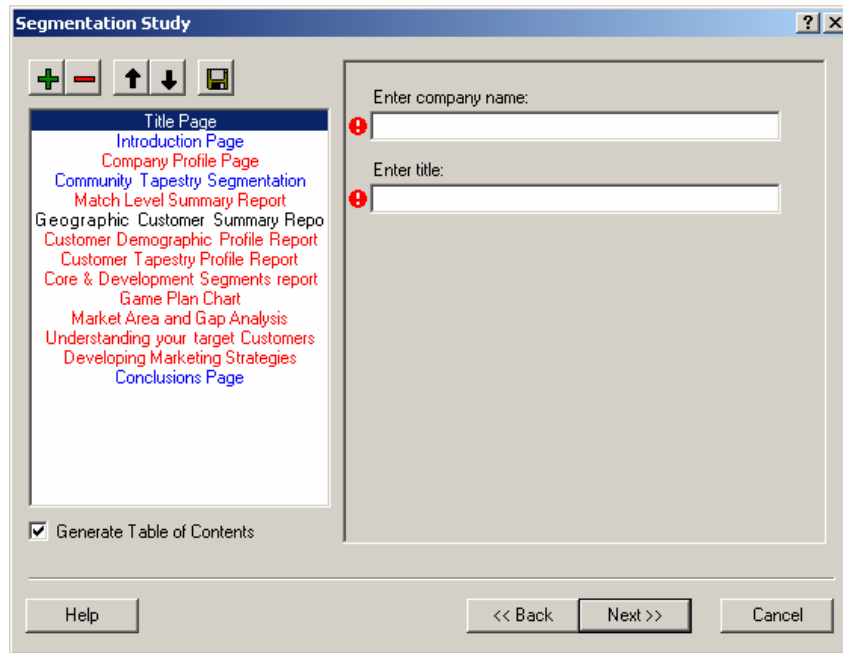


3. Select a segmentation study template from the list of existing templates. For this example, we are going to use the *Standard Segmentation Study Template* and click Next.

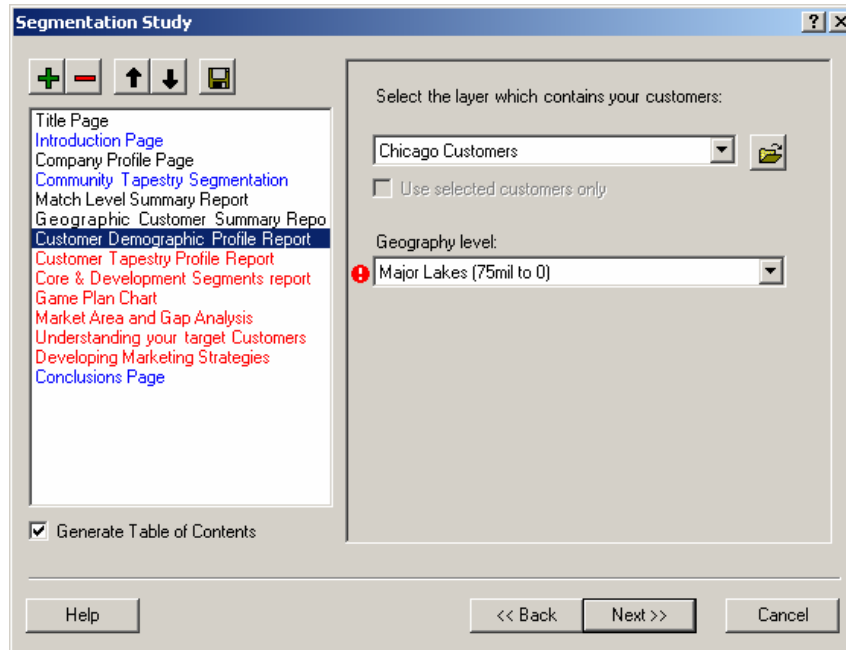




4. A list of report templates that make up this segmentation study are displayed, in order, in the window on the left. Report templates listed in red text require manual input before the segmentation study can be processed. Report templates listed in black text require no additional input. Report templates listed in blue text are “boiler plate” text only pages and require no input. You can change the order that the reports appear in the segmentation study by highlighting a report and using the up and down arrow keys to move the highlighted report up or down on the list. As you highlight each report, list fields that require input will appear on the right with an exclamation point in a red circle. This indicates you need input information in this field.



5. As you input data into the required fields, the exclamation point will disappear. When all fields that require input on a report are completed, the report will turn from red text to black text. Once you have completed all the fields that require input on all the reports, click Next.



6. Edit the segmentation analysis name or comments as desired and click Finish.

Segmentation Study

Please specify Study name:  
Chicago Cust Segmentation Study

Comments:

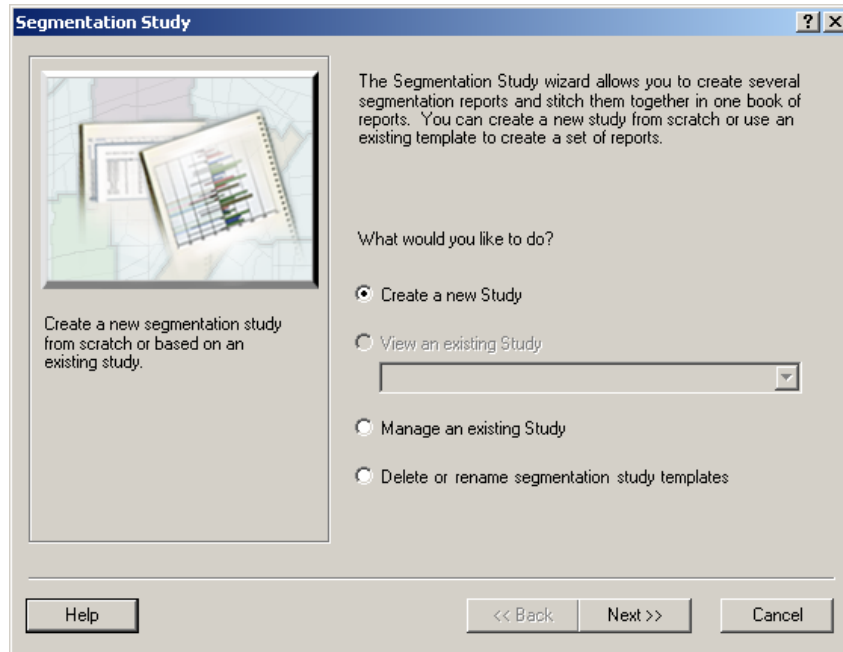
Print this Study now!

Help << Back Finish Cancel

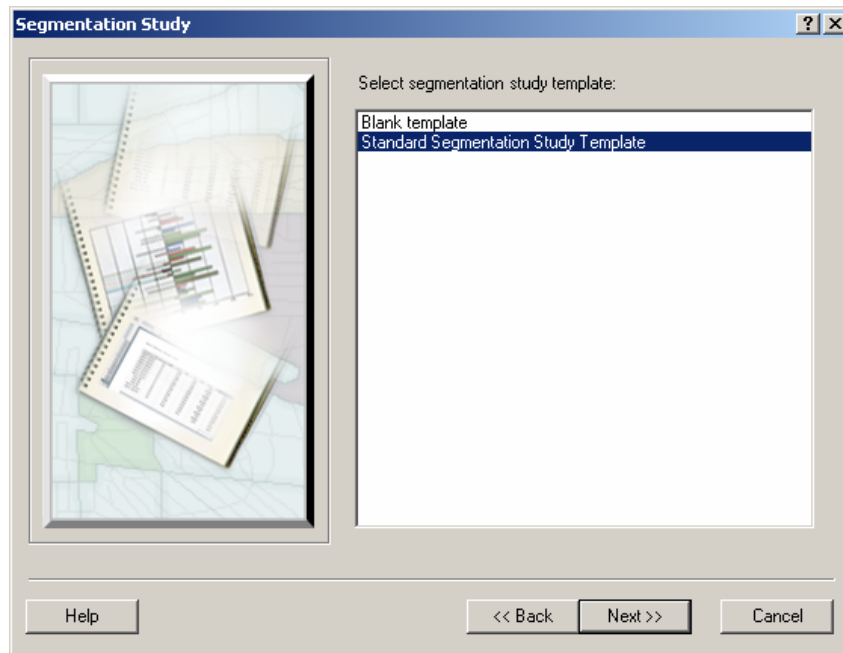
## Create a custom segmentation study

Business Analyst also gives you the flexibility to add and delete reports to create your own custom segmentation study or create a custom segmentation study starting with a blank template.

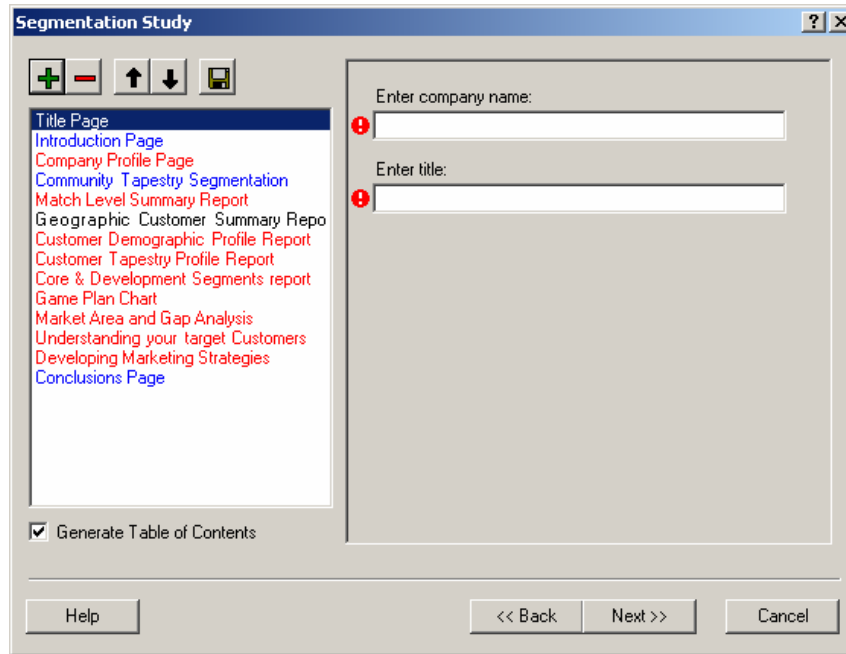
1. Select Segmentation, Segmentation study from the Business Analyst Drop-down main menu
2. Chose *Create a new study* and click Next.



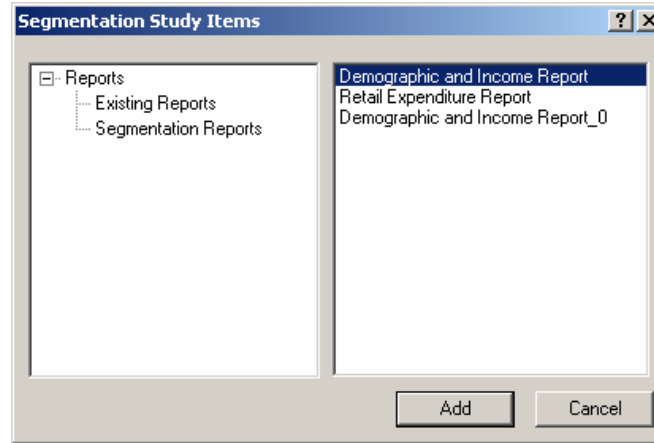
3. Select the *Standard Segmentation Study Template* from the list of existing templates and click Next.



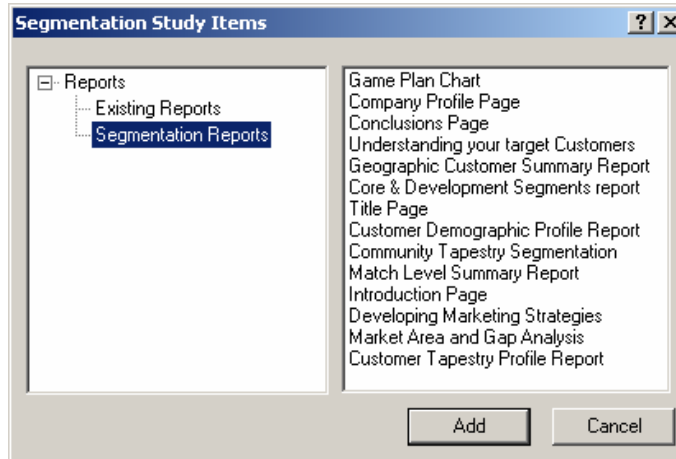
4. The list of reports included in the *Standard Segmentation Study Template* will be displayed. The list of reports can be customized by adding and deleting the existing reports listed. To delete a report from the standard study, highlight the report and click the minus button. To add new reports to the standard study, click the plus button.



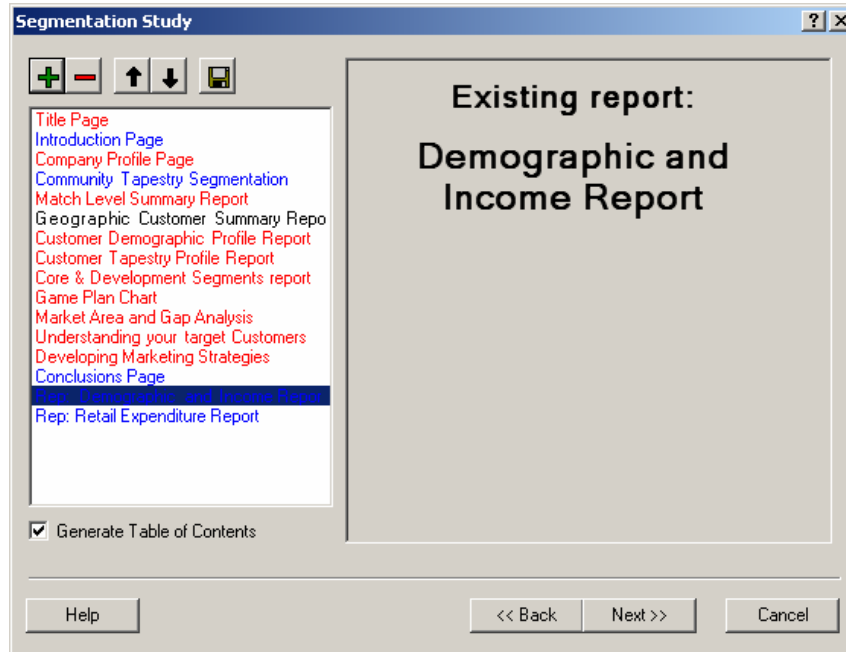
5. You can add any non-segmentation analysis reports, maps, or charts already created in Business Analyst. Select *Existing Reports* and highlight the report(s) from the list of available reports in the window on the right. Once the report(s) you would like to add are selected, click *Add*.



6. You can add any of the available segmentation reports. Select *Segmentation Reports* and highlight the segmentation reports from the list of available reports in the window on the right and click *Add*.

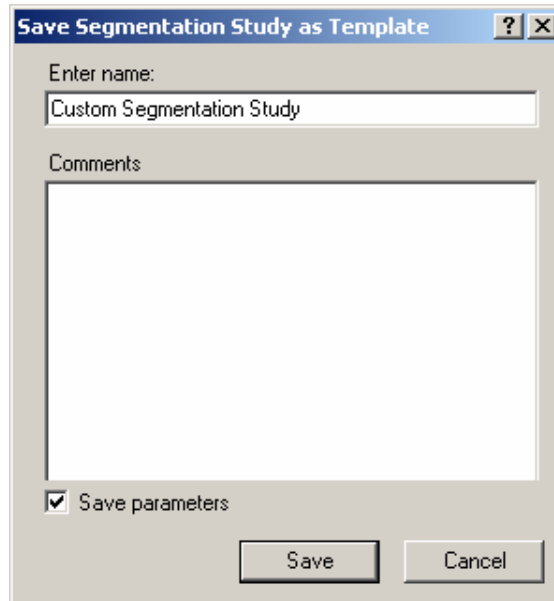


7. The reports selected will be added to the end of the booklet. Use the up and down arrow buttons to reposition these reports within the booklet as desired.





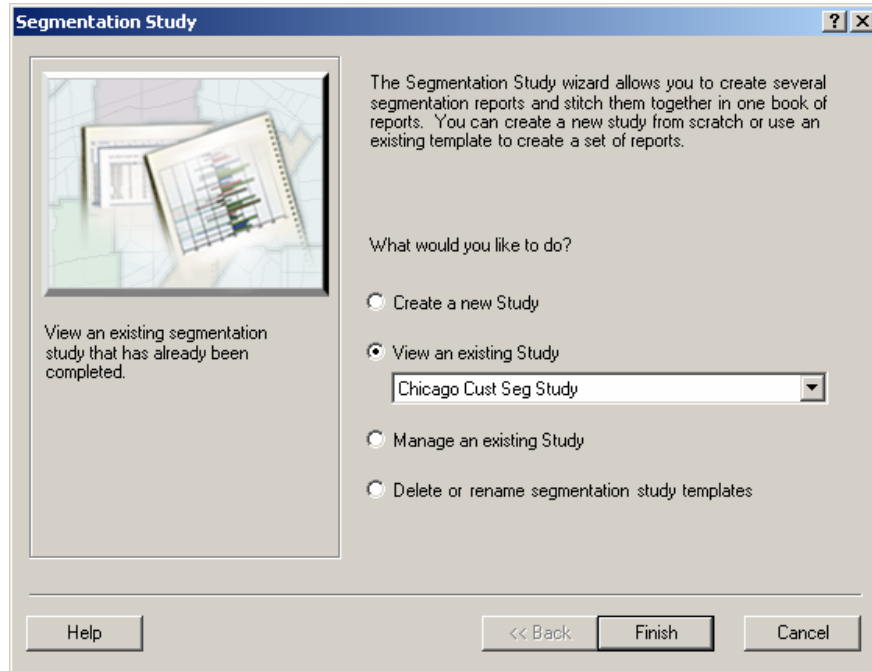
8. Use the button with the diskette to save your custom segmentation study. Enter a new name for your custom segmentation study and click *Save*. This report will now be available for selection under *Create Segmentation Study Template*.



By choosing the blank template and following the same steps you can build the complete study booklet from scratch.

## View an existing Study

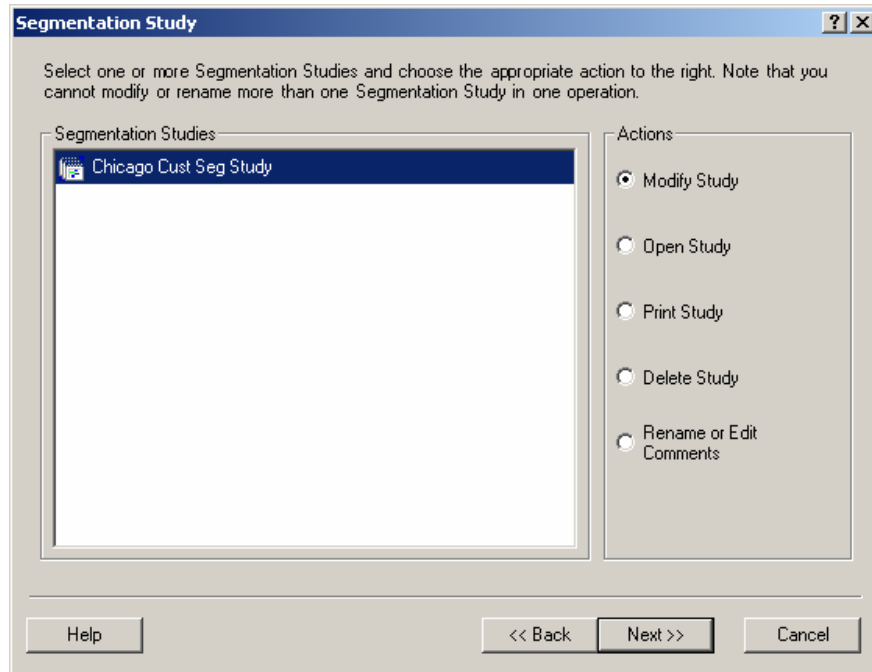
Before using this option, make sure any customer layers used in the study are added to your Business Analyst display. Use this option to view a segmentation study that you have previously created. Select an existing study from the drop-down menu of existing studies and click Finish.



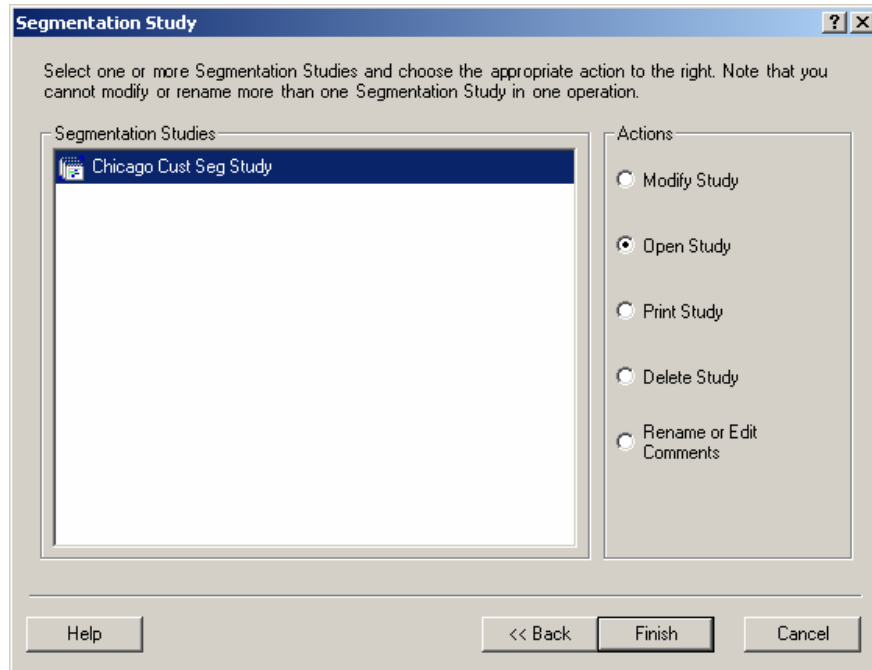
## Manage an existing Study

Use this option to modify, open, print, delete, or rename/edit comments for an existing segmentation study.

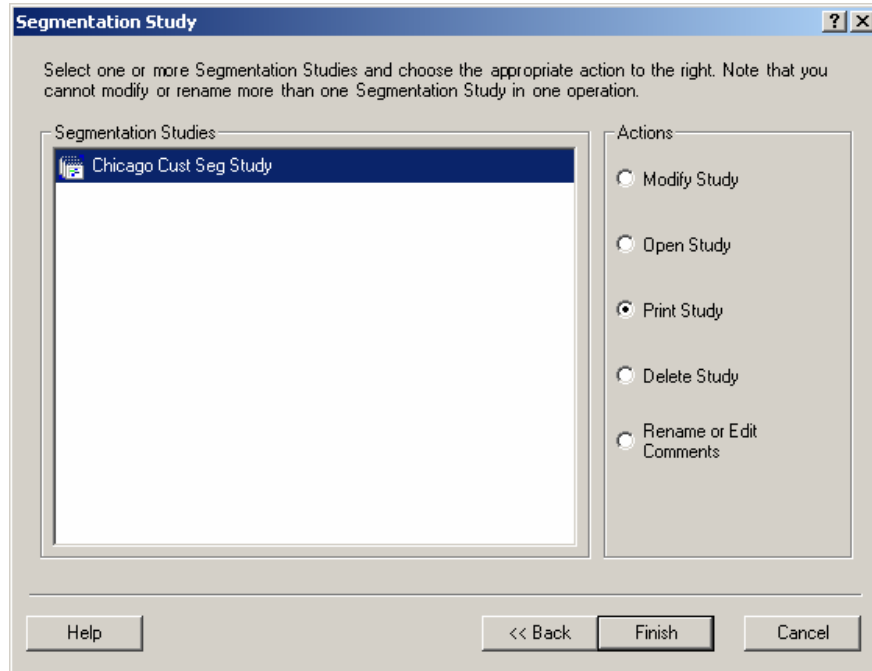
1. Use the *Modify Study* option to change the input selections on an existing segmentation study and rerun. Select the existing segmentation study from the window on the left, select *Modify Study* and click Next.



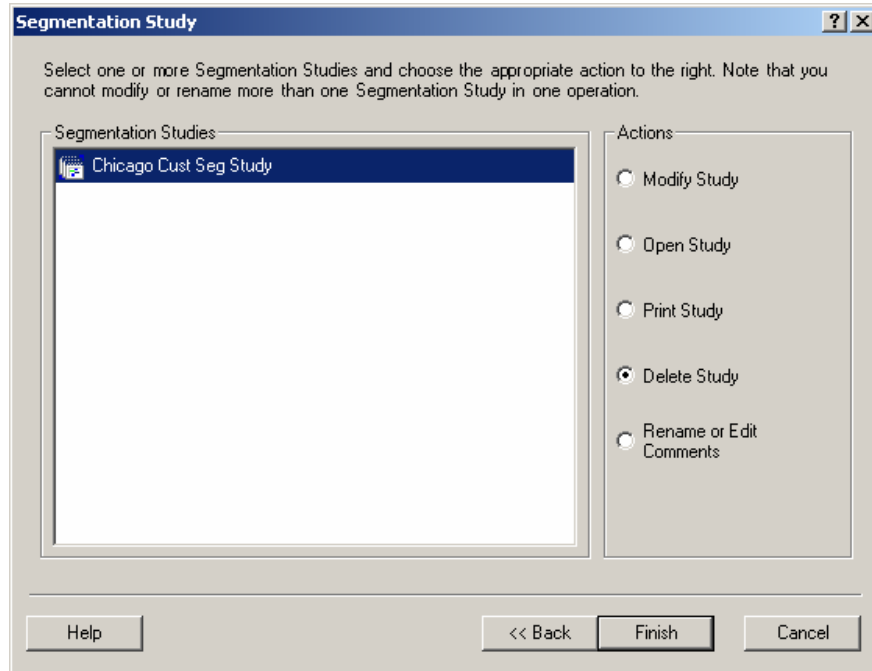
2. Use the *Open Study* option to view a segmentation study that you have previously created. Before using this option, make sure any customer layers used in the study are added to your Business Analyst display. Select an existing study from the list of existing studies on the left and click Finish.



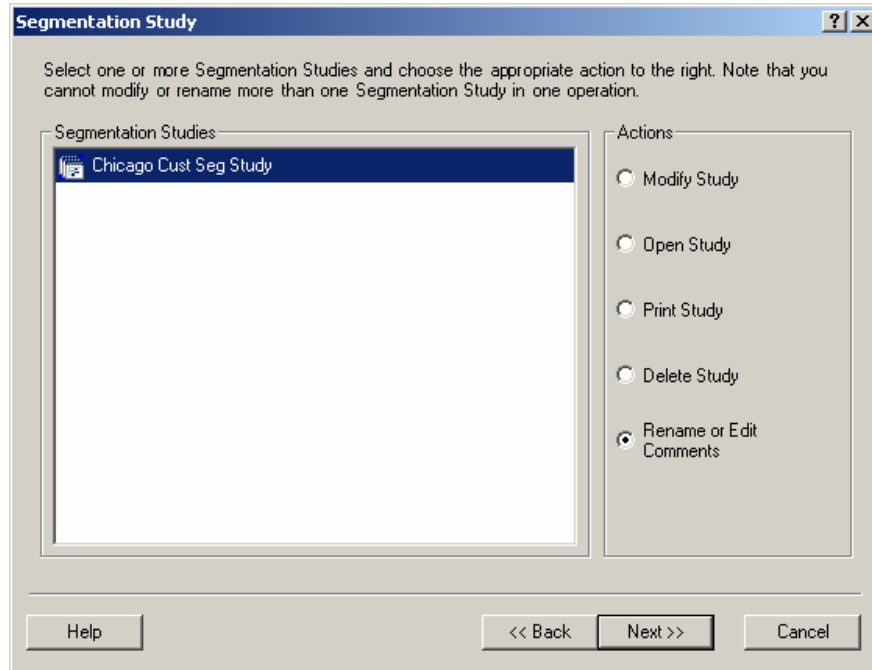
3. Use the *Print Study* option to print a previously created segmentation study. Select the desired segmentation study from the window on the left, select *Print Study* and click Finish.



4. Use the *Delete Study* option to delete one or more existing segmentation studies. Select the segmentation study(ies) you would like to delete, select *Delete Study* and click Finish.



5. Use the *Rename or Edit Comments* option to rename or update the comments on an existing segmentation study. Select the segmentation study from the window on the left, select *Rename or Edit Comments* and click Next.



Edit the segmentation study name or comments as desired and click Finish.

Segmentation Study

Please specify Study name:  
Chicago Cust Segmentation Study

Comments:

Print this Study now!

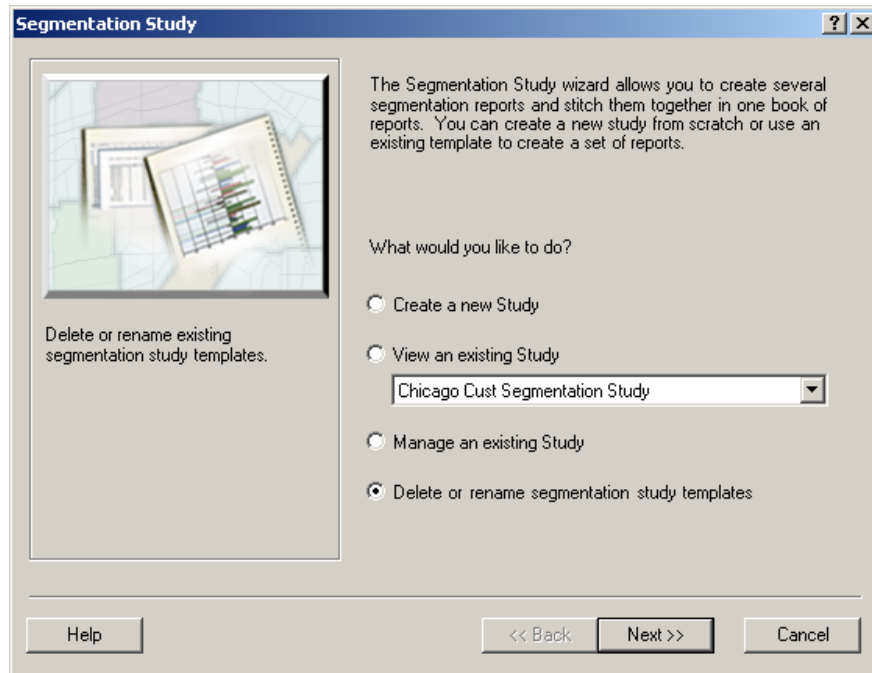
Help << Back Finish Cancel



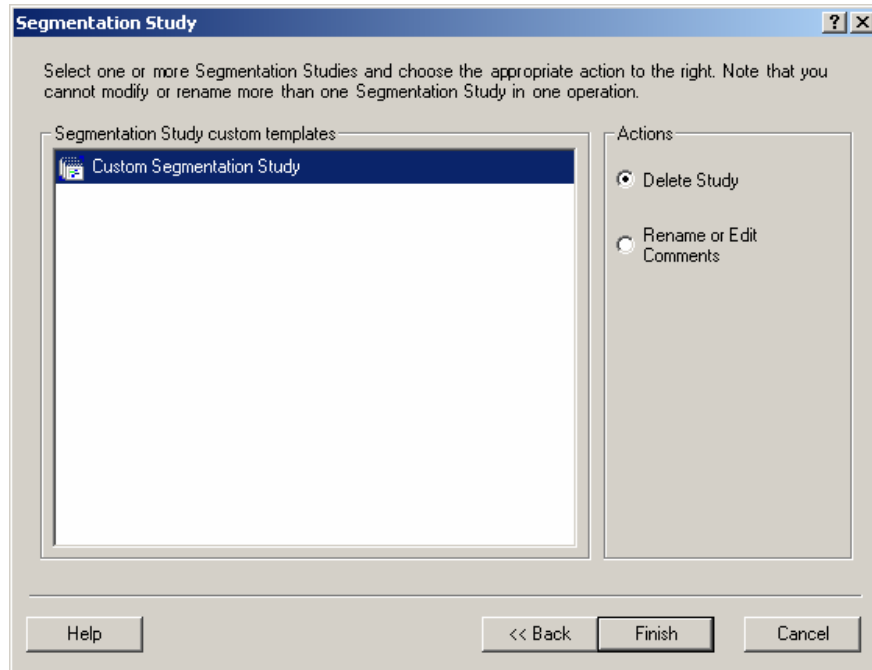
## Delete or rename study templates

Use this option to delete or rename a custom segmentation study template.

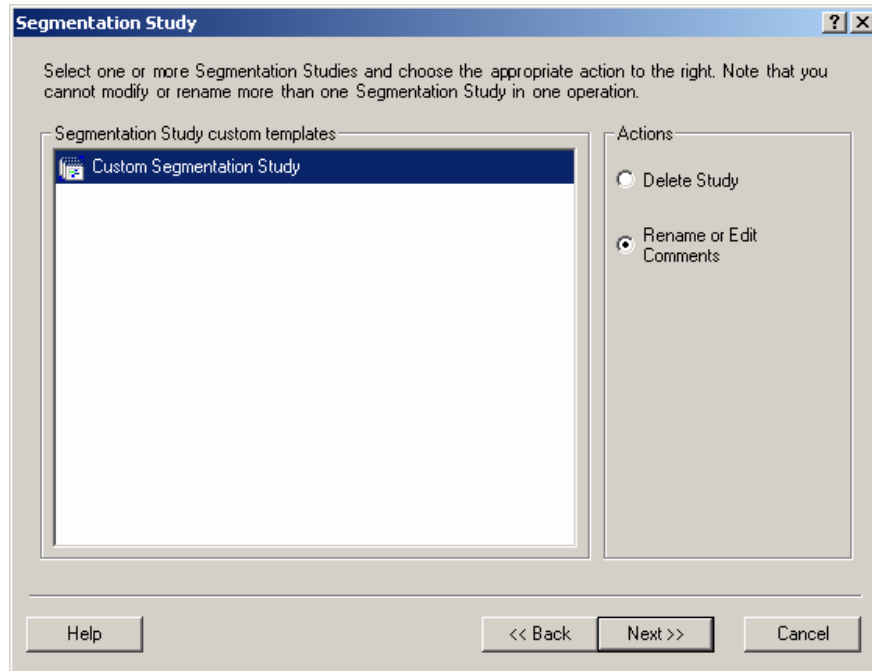
1. Select *Delete or rename segmentation study templates* and click Next.



- To delete a study template, select one or more of the segmentation study templates from the list of existing segmentation study templates, select *Delete Study*, and click Finish. The *Standard Segmentation Study Template* and the *Blank Template* cannot be deleted.



3. To *Rename or Edit comments* of a study template, select one or more of the segmentation study templates from the list of existing segmentation study templates, select *Rename or Edit Comments* and click Next.



Edit the segmentation study template name or comments as desired and click Finish.

Segmentation Study

Please specify Study name:  
Custom Segmentation Study1

Comments:

Print this Study now!

Help << Back Finish Cancel