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Segmentation Data for Community and Market Analysis

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Customer Intelligence

What is Customer Intelligence?

“Customer Intelligence (CI) is the process of gathering and analysing information regarding customers; their details and their activities, in order to build deeper and more effective customer relationships and improve strategic decision making. “

...Wikipedia

Retail

**Merchandise
Optimization**

Education

Restaurant

**Customer
Intelligence**

**Economic
Development**

Financial

Warehouse

Site Selection

Government

**Healthcare
Facility**

4 Fundamental Marketing Questions...

Who?

What?

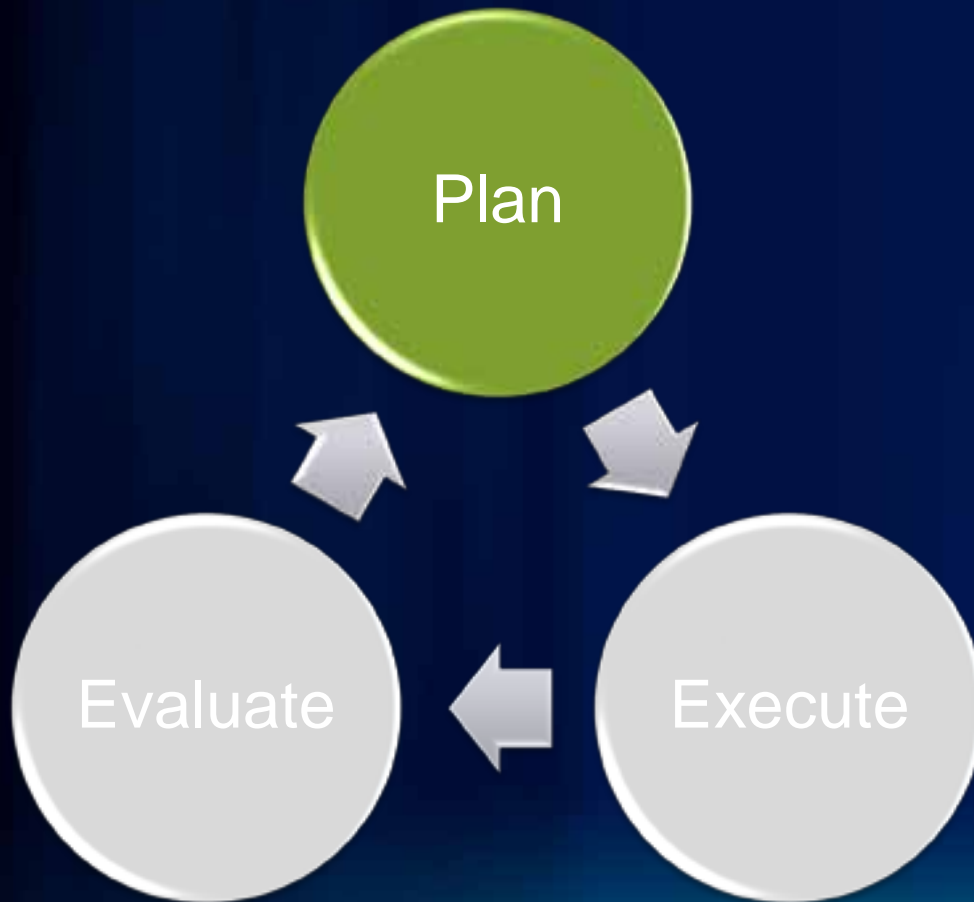
Where?

How?

The Marketing Process



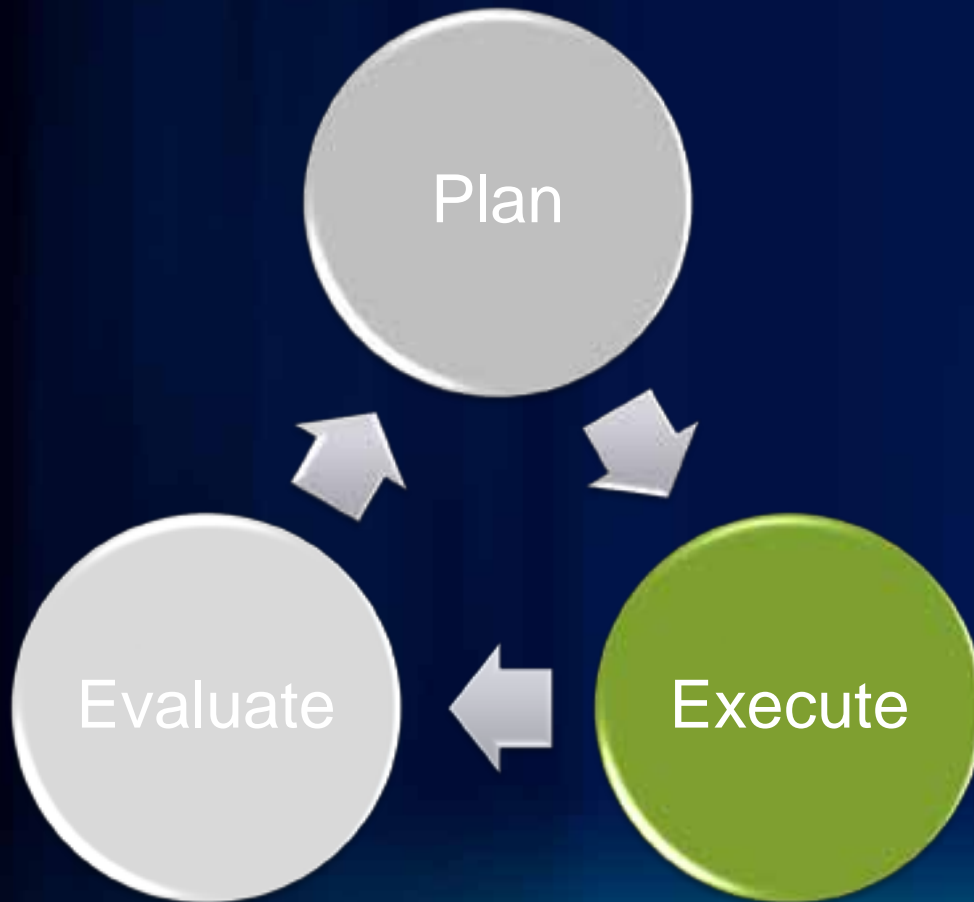
The Marketing Process



Who are my current customers?

What do they like to do?

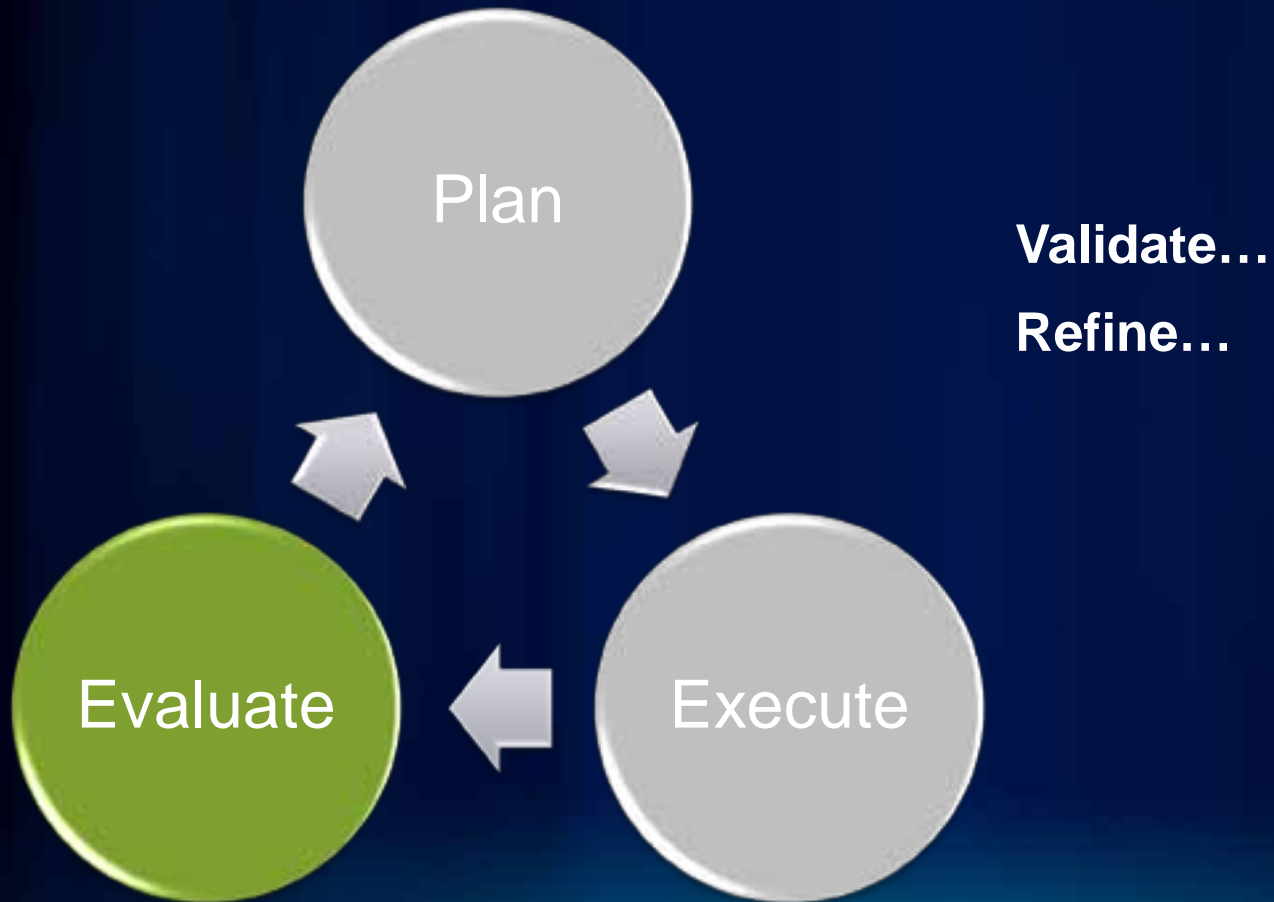
The Marketing Process



Where can I find more of them?

How do I reach them?

The Marketing Process

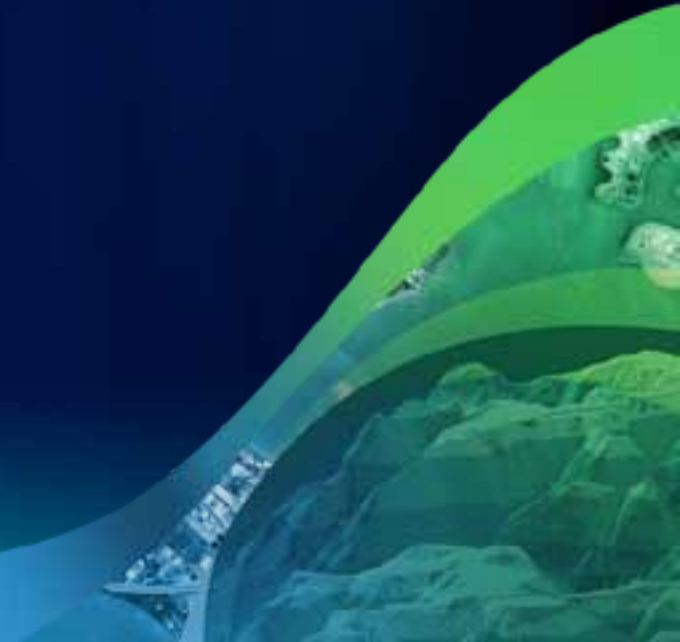


Goals of this presentation...

Use Tapestry Segmentation to:

- **Understand** our consumers and constituents
- **Supply** them with the right products and services
- **Reach** them through the most effective channels

What is Target Marketing?



116,761,140

households

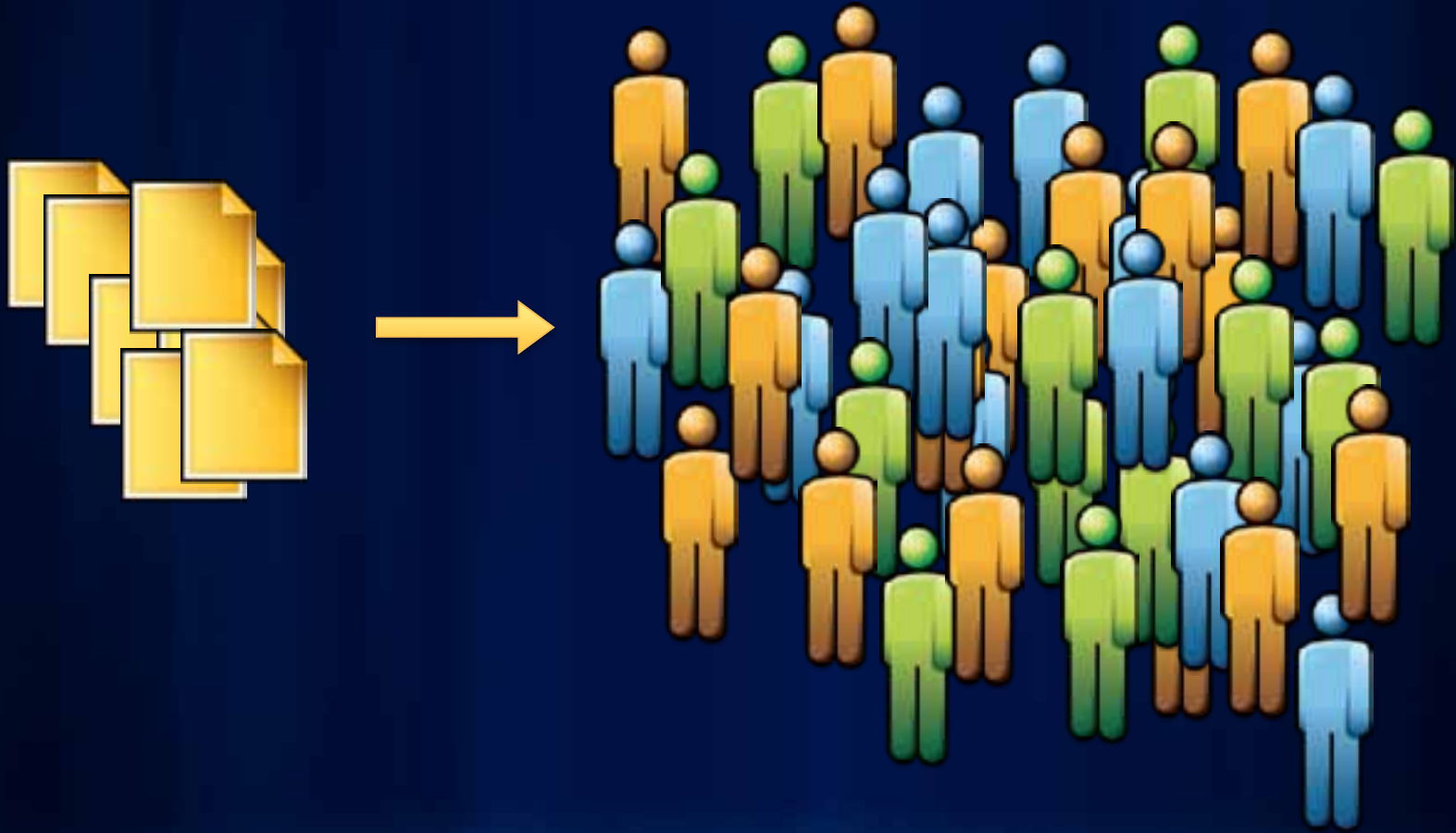
311,212,863

people

66

neighborhood types

Why Segment Your Customers?

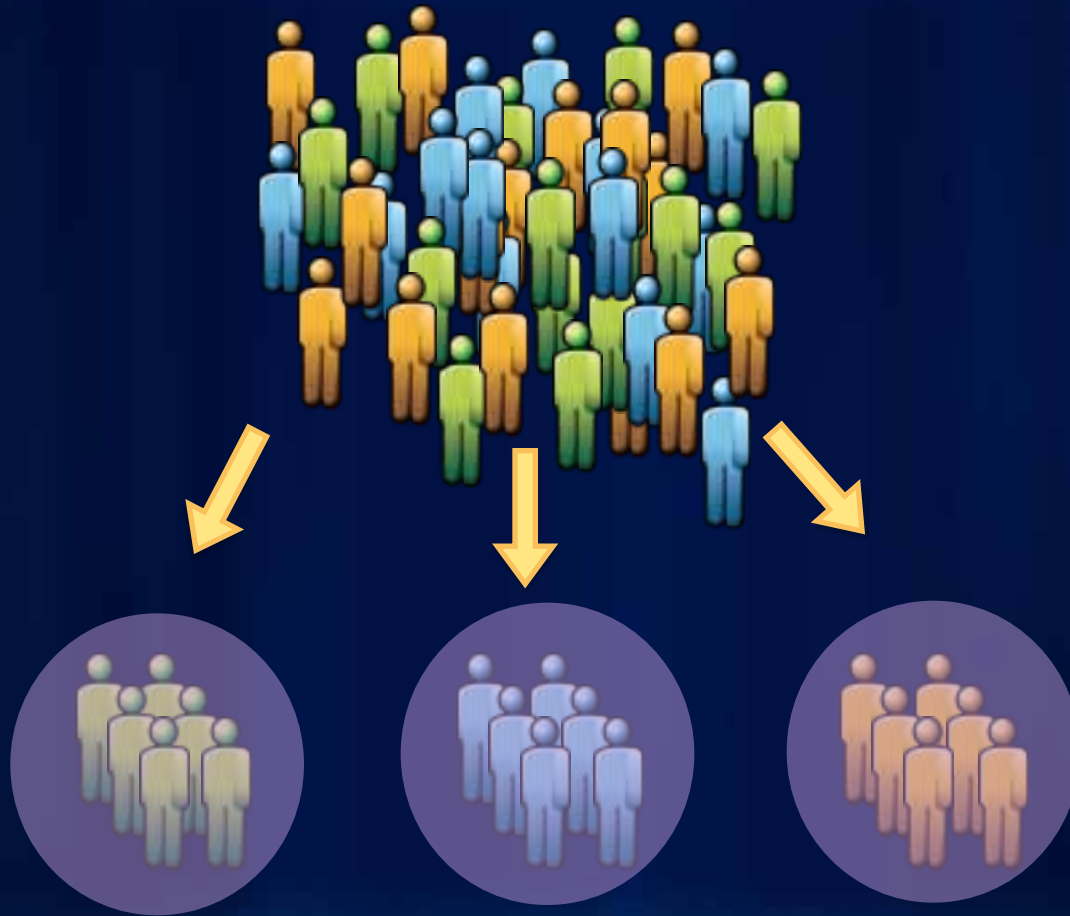


Market to everybody

Why Segment Your Customers?



Why Segment Your Customers?



Or market to target groups

Types of Segmentation Systems

Demographic

- Age, gender, income, family type, education, employment
- Descriptive only

Geographic

- Markets, cities, counties, census tracts, block groups
- Simple to use, can be mapped

Geodemographic

- Combines the “WHO” with the “WHERE”
- Actionable
- Descriptive, can be mapped, easy to Implement



Esri Tapestry Segmentation System

65 Distinctive Neighborhood Segments

12 LifeMode Summary Groups

- Based on Lifestyle and Lifestage

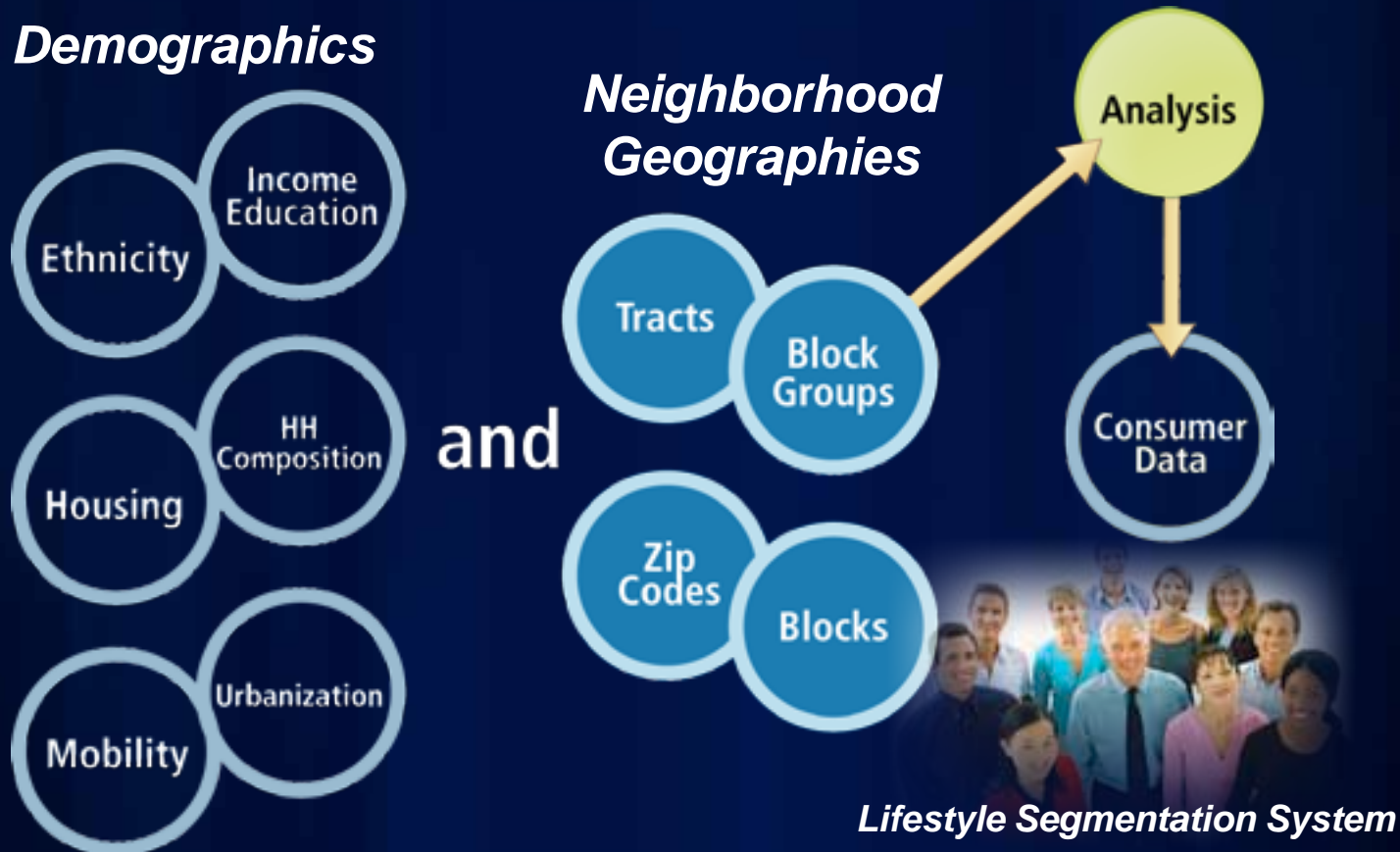
11 Urbanization Summary Groups

- Based on Density and Affluence

Built with proven segmentation methodologies



How was Tapestry Segmentation Built?



Based on the premise that people with similar tastes seek others like them – “Like Seeks Like.”

Address Record without Tapestry

**John Smith
1201 South Main Street
Fairfax, VA 22031**

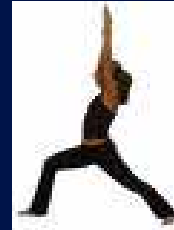


**Male
Lives in Fairfax, VA**

Address Record with Tapestry

John Smith
1201 South Main St.
Fairfax, VA 22031

Segment: *Enterprising Professionals*
LifeMode Group L2: *Upscale Avenues*
Urbanization Group U3: *Metro Cities 1*



- Median age: 32.4 Years
- Employment: Prof/Mgmt
- Median income: \$69,779
- Housing: Townhouse
- Median Home Value: \$223,479
- Listens to talk and public radio
- Shops and banks online
- Relies on email
- Has education loan
- Eats out at steakhouses
- Reads computer and technology magazines
- Owns/leases Honda
- Watches *Seinfeld* reruns

What Value Does Tapestry Add?

Demographics	Area A	Area B
2010 Median Household Income	\$67,295	\$69,779
2010 Median Age	48.9 Years	32.4 Years
2010 % Homeowners	85%	45%

Add Segmentation	Area A	Area B
Car	Own or Lease a Honda	Own or Lease a Lexus
Media	Read Newspapers	Read Online Magazines
Recreation	Attend Golf Tournaments	Likely to join a gym
Banking	Own a US Savings Bond	Bank Online
Television	Watch the History Channel	Watch MTV
Urban/Rural	Rural	Urban

Tapestry Segmentation

- How can Tapestry answer the bank's four fundamental marketing questions?

WHO are their customers and prospects?

WHAT do they demand?

WHERE are they located?

HOW can they reach them?

- How can Business Analyst help?



The Power of Tapestry Segmentation

- **Accurately captures the diversity of U.S. markets**
- **Reveals new market trends**
 - **Age diversity**
 - **Income diversity**
 - **Hispanic market emergence**



Tapestry's View of Seniors

LifeMode Summary Group L5: Senior Styles



**#14 Prosperous
Empty Nesters**



**#30 Retirement
Communities**



**#50 Heartland
Communities**



#15 Silver and Gold



#43 The Elders



#57 Simple Living



#29 Rustbelt Retirees



#49 Senior Sun Seekers



#65 Social Security Set

How Tapestry Sees Immigrants

Ethnically and Culturally Diverse Families



#35 International Marketplace



#47 Las Casas



#59 Southwestern Families



#38 Industrious Urban Fringe



#52 Inner City Tenants



#60 City Dimensions



#44 Urban Melting Pot



#58 NeWest Residents



#61 High Rise Renters

Tapestry's View of Income

Wide Disparity



#01 Top Rung



#25 Salt of the Earth



#47 Las Casas



#08 Laptops & Lattes



#40 Military Proximity



#64 City Commons

Tapestry's View of Singles

LifeMode Summary Group L4: Solo Acts



#08 Laptops & Lattes



#23 Trendsetters



#27 Metro Renters



#36 Old and Newcomers



#39 Young and Restless

Demo



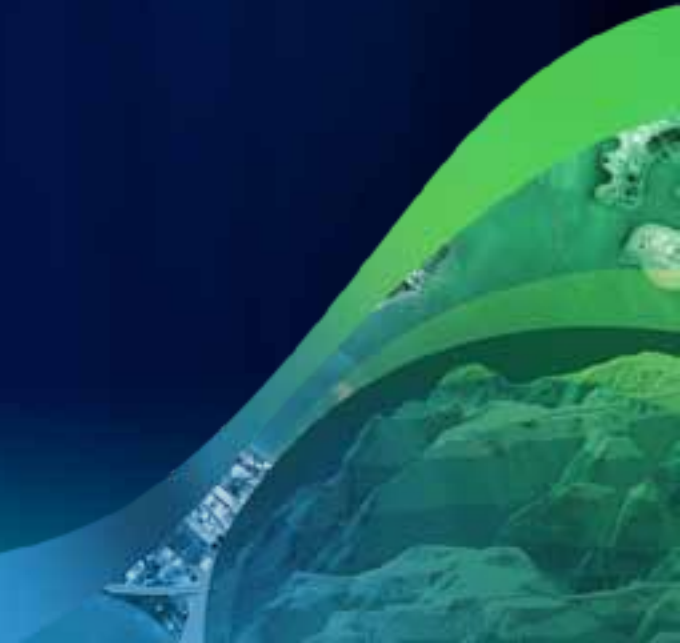
Why Use Tapestry and Business Analyst?

There's a connection between human behaviors and neighborhood structure.

- Describe your current customers
- Identify locations of your best prospects
- Select profitable sites for expansion
- Design campaigns to build customer loyalty
- Save marketing campaign dollars
- Understand neighborhood variations
- Pinpoint marketing opportunities



Esri Business Analyst



Esri Business Analyst



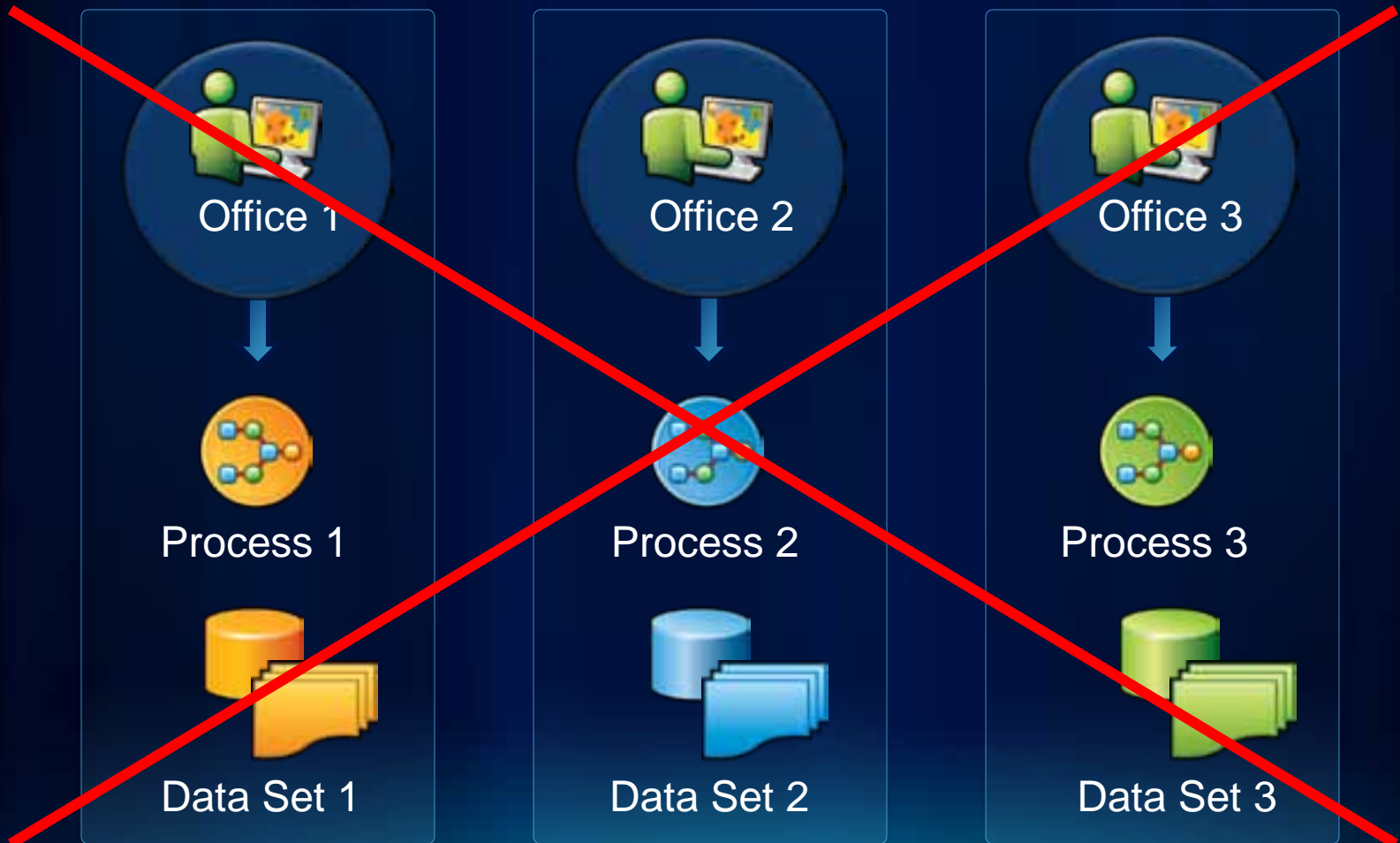
Field Users:
BA Mobile App

Business Professionals:
BA Web App

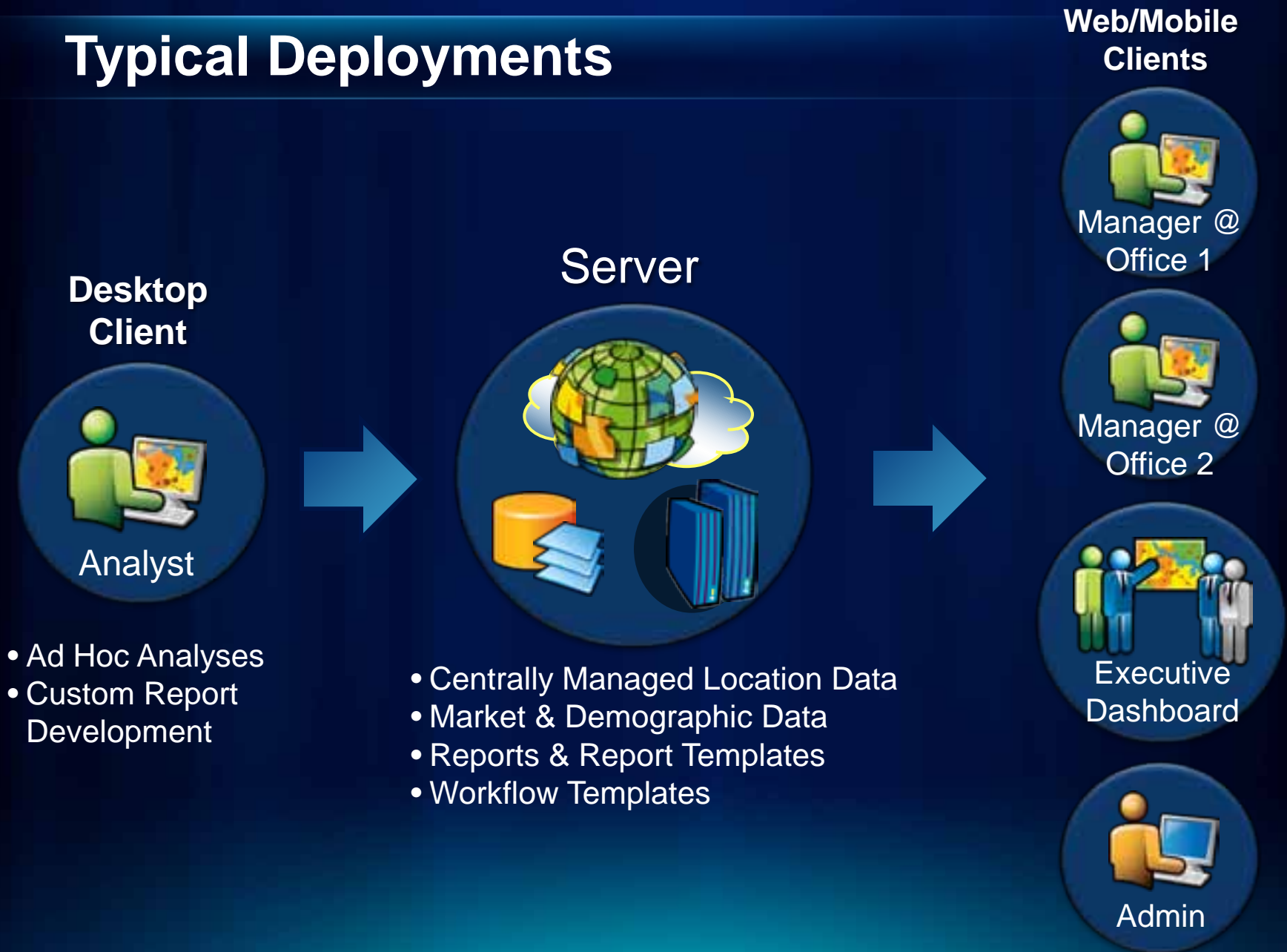
Professional Analysts:
BA Desktop

Enterprise:
BA API &
BA Server

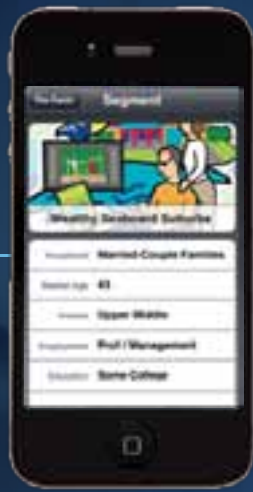
Enterprise Deployments: Eliminating Silos



Typical Deployments



BAO iPhone and iPad App



BAO App



- **Get Demographic Data by Location**
- **Compare Locations**
- **See if the Location Meets Required Criteria**

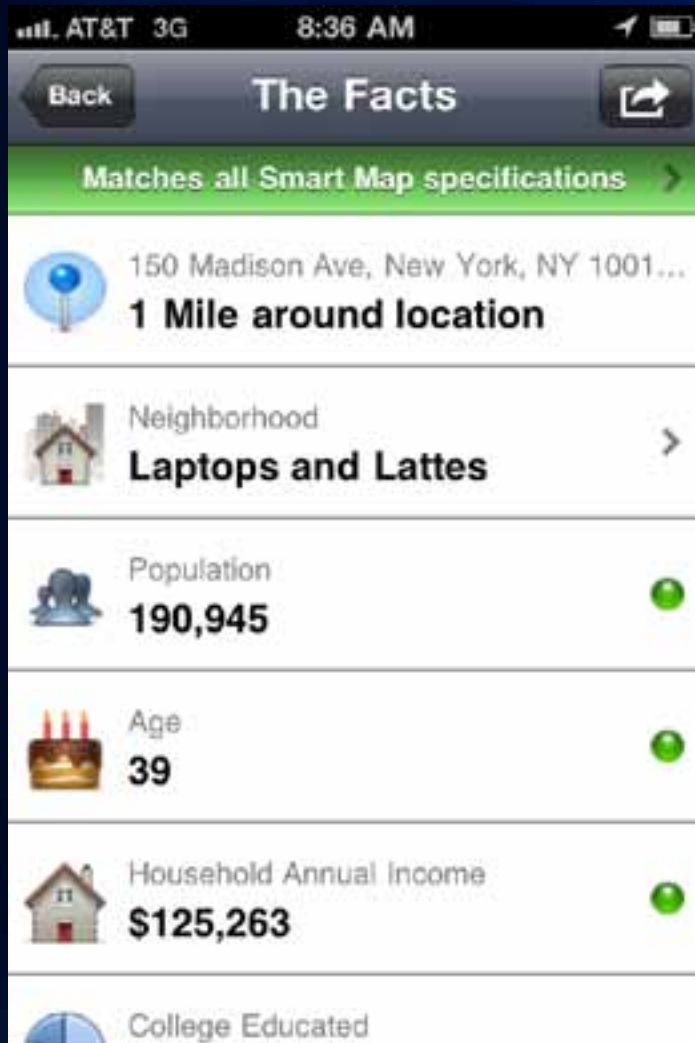
FREE!

BAO App



- Analyze 1-mile area around a location
 - Your current location
 - Search for an address
 - Search for one of your contacts

BAO App



- Included Demographic Facts:

- Tapestry Segment
- Population
- Median Age
- Median Household Income
- Percent College Educated
- Unemployment Rate
- Average Household Size
- Percent Home Owners
- Retail Spending
- Restaurant Spending
- Entertainment Spending

BAO App



- Includes details on the dominant Tapestry Segment in the area

BAO App



- Allows you to compare one location against another:
 - Rest of the county
 - Rest of the state
 - Rest of the country
 - Or another site

BAO App Smart Map Feature



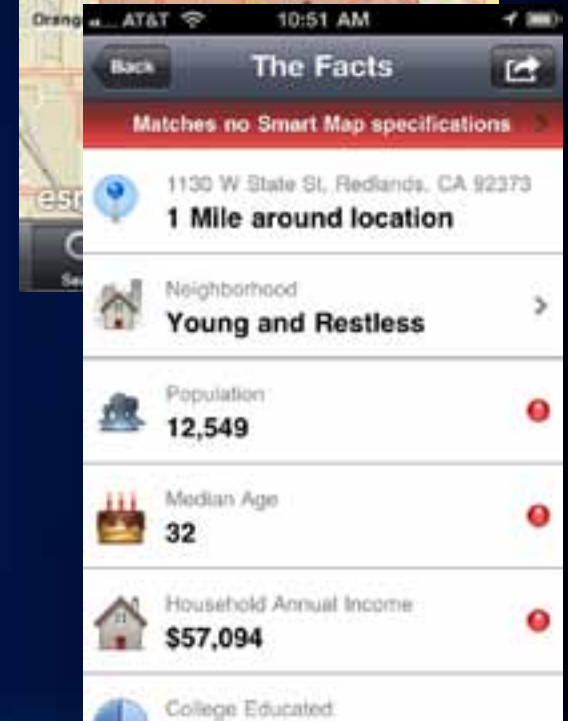
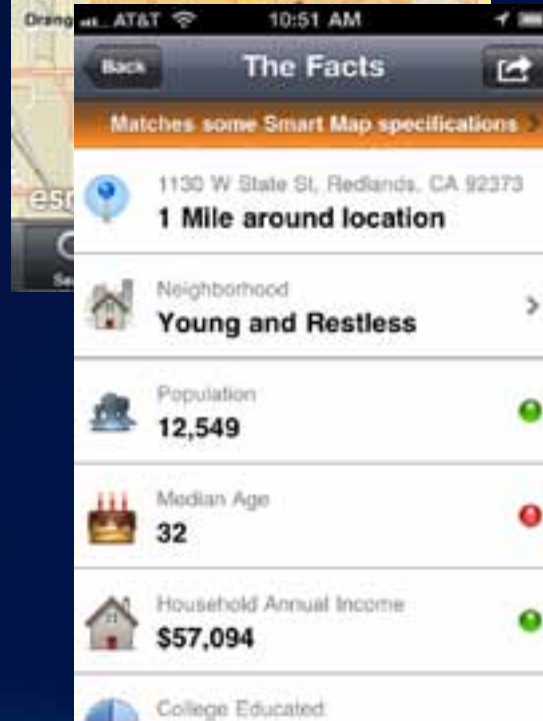
Turn "Smart Map" On ...



Define Your Criteria for
Population, Age, Income



Set Desired Range
for each...



GREEN:
All Criteria Match

ORANGE:
Some Criteria Match

RED:
No Criteria Match

BAO App – Added Value for Users



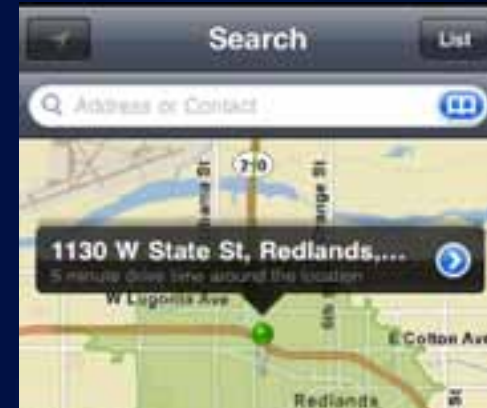
The screenshot shows the 'Account' screen of the BAO App. At the top, there is a 'Back' button on the left, the title 'Account' in the center, and a 'Sign In' button on the right. Below the title bar is a blue link that says 'Trouble signing in?'. The main content area contains two input fields: 'Username' with the placeholder text 'User Name' and 'Password' with the placeholder text 'Password'. Below these fields is a toggle switch for 'Automatically Sign In', which is currently turned 'ON'. Underneath the toggle, a note states: 'Will attempt to sign in as soon as BAO has been launched.' At the bottom of the screen is a large blue button with a gear and document icon, containing the text 'Register now for a free 30 day Basic Subscription trial' and 'Tap here for more details'.

← Sign In to Access More Features

← Register for Free Trial

BAO App – Added Value for Users

- When you are signed in you can:
 - Adjust Study Area from:
 - 1 to 100 miles
 - 1 to 60 Minute Drive Times
 - Generate and View Esri Reports



ArcGIS Online Demographic Maps



ArcGIS Online Demographic Maps

ArcGIS Online

Map Services

ArcGIS Online map services are available **at no cost**.

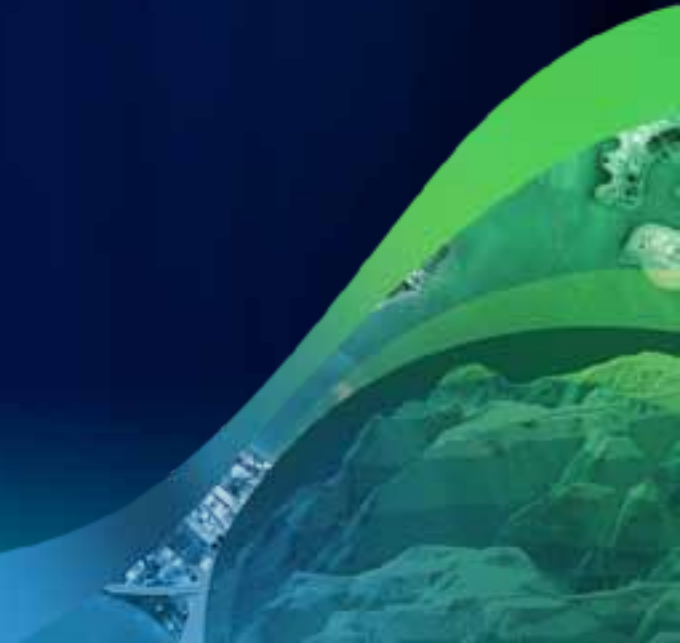
These free map services can be used with ArcGIS 9.3 Service Pack 1, ArcGIS 9.3.1, ArcGIS 10, and [ArcGIS Web Mapping](#). [Preview](#) ArcGIS Online imagery, street, and topography basemaps as Bing Maps with this viewer.

Basemaps Demographic Maps Reference Maps Specialty Maps

USA Average Household Size	USA Daytime Population	USA Diversity Index
USA Labor Force Participation Rate	USA Median Age	USA Median Home Value
USA Median Household Income	USA Median Net Worth	USA Owner-Occupied Housing
USA Population by Sex	U.S. Population by Age 65	U.S. Population Younger Than

- **FREE!**
- **20 different maps**
- **Includes:**
 - Tapestry
 - Esri Updated Demographics
 - Consumer Spending Data
 - Daytime Population
 - Social Vulnerability Index

Where to Learn More



Thursday



General



Technical



Special Interest

Time	Title	Room
8.30	Best Practices for App Development: A Case Study of User Centered Design	32A
10.15	Community & Demographic Analysis – Build Your Own Apps and Web Sites	32A

Other Ways to Reach Us



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