



Personicx® Lifestage Clusters

Select Best Audiences and Optimize Campaigns

Personicx Lifestage is a household-level consumer segmentation system that assigns each U.S. households into one of 72 segments based on fundamental characteristics including: age, income, marital status, presence of children, net worth, consumer prominence, home ownership and population density (urban vs. rural).

Personicx Lifestage NS ("new system") was recently upgraded from a previous version to include more clusters with finer net worth gradations at higher dollar levels and the inclusion of a consumer prominence indicator. The new clusters were developed using algorithms such as K-Means++ with data elements selected using Principal Component and Random Forest Analyses. In addition to statistical methods, another key goal in developing clusters was the ability to predict responses to marketing campaigns. Behavioral summaries for each of the 72 clusters rely on MRI-Simmons consumer surveys.

Personicx Lifestage Use Cases

- Analyze Customers
- Select Best Audiences
- Analyze Geographic Markets
- Personalize Messaging
- Lifetime Value by Cluster
- Campaign Conversion by Cluster

Two ways to determine which clusters are most prominent among existing customers:

- **Run a Demographic-Personicx Profile Report on existing customers.** Review the Market Penetration Index ("Index") in rank order to determine which clusters have historically converted at higher rate. These are the best clusters to choose new audiences. The advantage of this approach is that it is less expensive for customer files of 10K or more and the results are provided in a simple table, plus you get results for other variables.
- **Append Personicx clusters to customer names and addresses.** Determine the share of total customers by cluster and compare to the shares in your market area to determine the Index. The advantage of this approach is that you receive appended data at the record level that you can store in your CRM database.



Personicx Lifestage Clusters

Market Penetration Index is calculated based on the customer share for a cluster divided by the prospect share by cluster. By sorting by descending Index value, you can determine the most prominent clusters in your customer database.

Personicx Clusters Sorted by Market Penetration Index

Cluster #	Cluster Name	Customer #	Customer %	Prospect #	Prospect %	Index
03	Flourishing Professionals	1,972	6.6%	25,942	1.93%	341
02	Fortuned Estates	1,865	6.2%	25,124	1.87%	333
29	Nesting Nomads	1,286	4.3%	19,756	1.47%	292
01	Elite Earners	1,022	3.4%	16,257	1.21%	282
08	Conscientiously Comfortable	1,326	4.4%	25,750	1.91%	231
06	Onward & Upward	1,032	3.4%	20,760	1.54%	223
03	Flourishing Professionals	922	3.1%	18,715	1.39%	221
26	Finding Home	856	2.9%	20,210	1.50%	190
10	Digitally Kinetic	754	2.5%	18,087	1.34%	187
04	Gilt-Edged Guardians	675	2.3%	16,279	1.21%	186
35	Astute City Elders	672	2.2%	16,563	1.23%	182
12	Well-Funded Families	452	1.5%	11,265	0.84%	180

Applying the demographic data elements to the top performing clusters provides insight into the types of households to target.

Personicx Clusters Sorted by Index with Key Demographic Elements

Cluster #	Cluster Name	Age	Marital Status	Home Ownership	Children	Income	Net Worth	Consumer Prominence	Primary Urbanicity	Index
03	Flourishing Professionals	30-75	Single/Married	Owner/Renter	No Children	\$250,000+	\$2 to 3MM	6.7	Suburban	341
02	Fortuned Estates	36-75	Married	Owner	Children-Age Mix	\$250,000+	\$3MM+	8.6	Suburban	333
29	Nesting Nomads	36-75	Married	Renter/Owner	No Children	\$100,000-124,999	\$250 to \$499K	7.9	Suburb/City	292
01	Elite Earners	46+	Married	Owner	No Children	\$250,000+	\$3MM+	8.2	Suburban	282
08	Conscientiously Comfortable	36-75	Married	Owner	No Children	\$250,000+	\$1 to 2MM	9.2	Suburban	231
06	Onward & Upward	24-65	Single	Renter	No Children	\$250,000+	\$1 to 2MM	3.6	City/Suburb	223
03	Flourishing Professionals	30-75	Single/Married	Owner/Renter	No Children	\$250,000+	\$2 to 3MM	6.7	Suburban	221
26	Finding Home	36-75	Single	Renter	No Children	\$100,000-124,999	\$250 to \$499K	2.0	City/Suburb	190
10	Digitally Kinetic	24-65	Married	Owner	No Children	\$100,000-124,999	\$1 to 2MM	4.7	City/Suburb	187
04	Gilt-Edged Guardians	30-65	Single	Owner	Children-Age Mix	\$250,000+	\$2 to 3MM	8.3	Suburban	186
35	Astute City Elders	56+	Married	Owner	No Children	\$40,000-49,999	\$100 to \$249K	8.1	Suburban	182
12	Well-Funded Families	36-75	Married	Owner	Children-Age Mix	\$200,000-249,999	\$1 to 2MM	8.7	Suburban	180

With this knowledge you can select best audiences for any type of direct marketing campaign (direct mail, email, social or digital).

For the complete Personicx Data Dictionary go to <https://www.inboundinsight.com/resources>

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