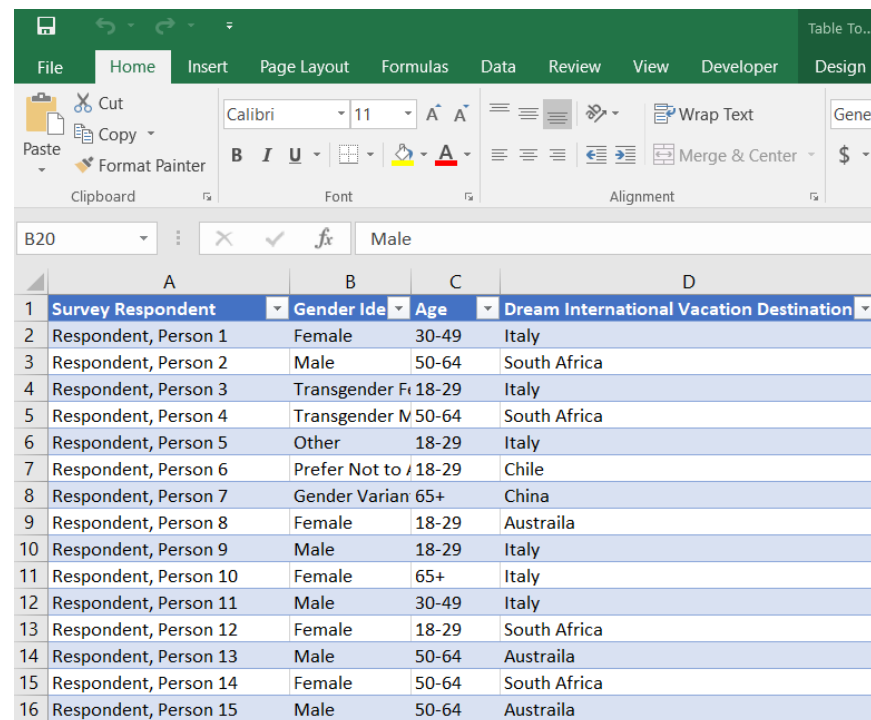


PivotTables in Excel

In this guide, we will show you how to create a simple PivotTable to give you a Count and a Percentage of the Grand Total of the variables in the data set. We will also show you how to add a Filter to your PivotTable to see different subsets of the data.

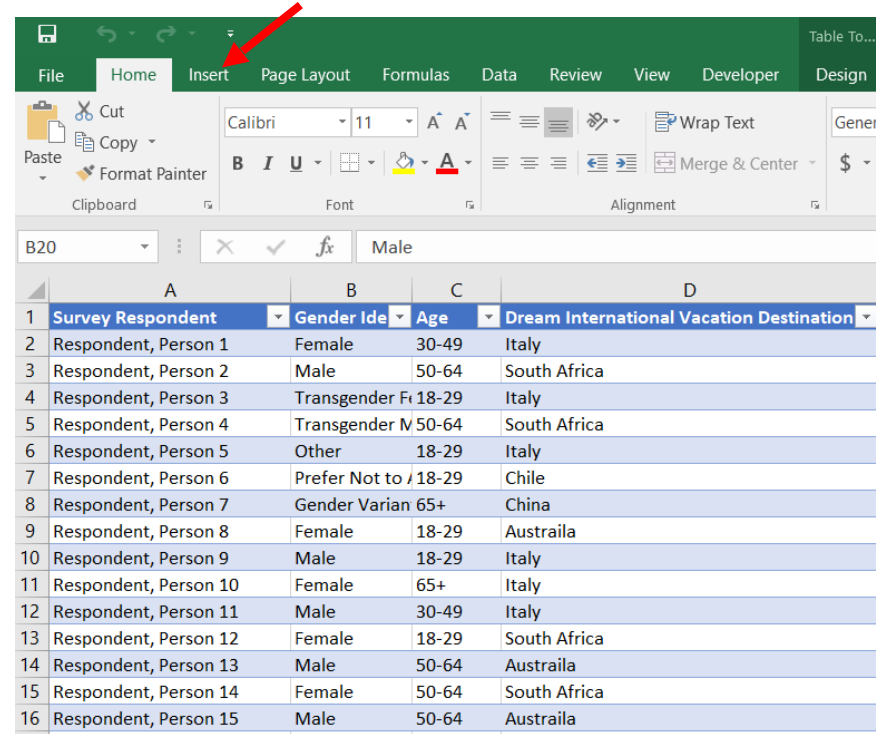
The data set provided displays survey responses on people's dream international vacation destination. Respondents had the choice of 5 options (Australia, Chile, China, Italy or South Africa). Respondents were also asked what gender they identify as and their age (in the form of a range). There were 500 responses to the survey.

On the PivotTable worksheet in Excel, you will see that the data is in the form of a table. It is best practice to have your data in a table, as it makes it easier to update the PivotTable when new data is added to the data set.

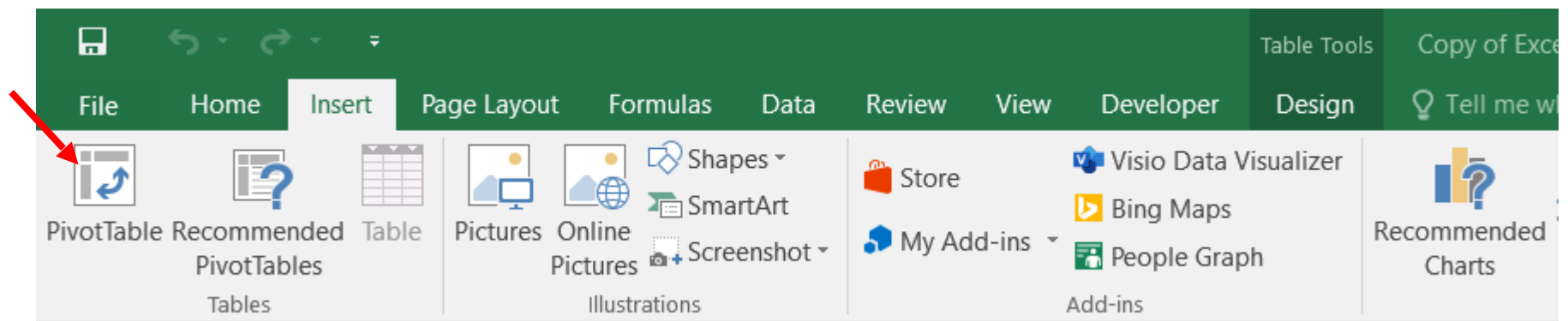


	A	B	C	D
1	Survey Respondent	Gender	Age	Dream International Vacation Destination
2	Respondent, Person 1	Female	30-49	Italy
3	Respondent, Person 2	Male	50-64	South Africa
4	Respondent, Person 3	Transgender Female	18-29	Italy
5	Respondent, Person 4	Transgender Male	50-64	South Africa
6	Respondent, Person 5	Other	18-29	Italy
7	Respondent, Person 6	Prefer Not to Answer	18-29	Chile
8	Respondent, Person 7	Gender Variant	65+	China
9	Respondent, Person 8	Female	18-29	Australia
10	Respondent, Person 9	Male	18-29	Italy
11	Respondent, Person 10	Female	65+	Italy
12	Respondent, Person 11	Male	30-49	Italy
13	Respondent, Person 12	Female	18-29	South Africa
14	Respondent, Person 13	Male	50-64	Australia
15	Respondent, Person 14	Female	50-64	South Africa
16	Respondent, Person 15	Male	50-64	Australia

To create your PivotTable, click on Insert, on your Excel Ribbon.

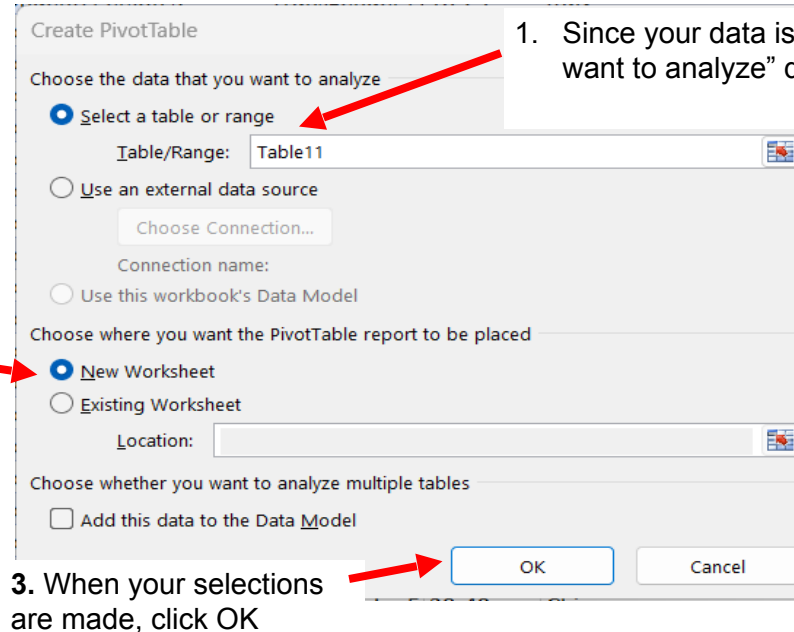


You will notice, that our Menu options changed from the Home Menu options to the Insert Menu Options. Click on PivotTable.

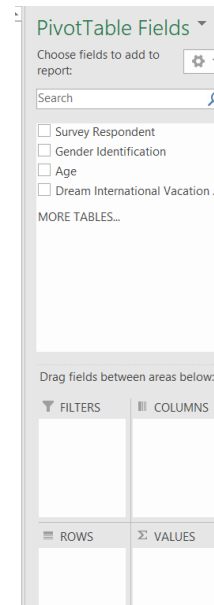
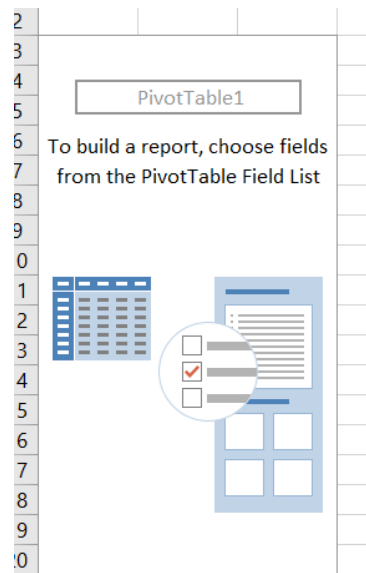


The Create PivotTable Window will open.

2. It then asks where you want your PivotTable to be placed. The default is to a New Worksheet (this is what you will do), but you could choose to place the PivotTable in the same Worksheet as the data set.

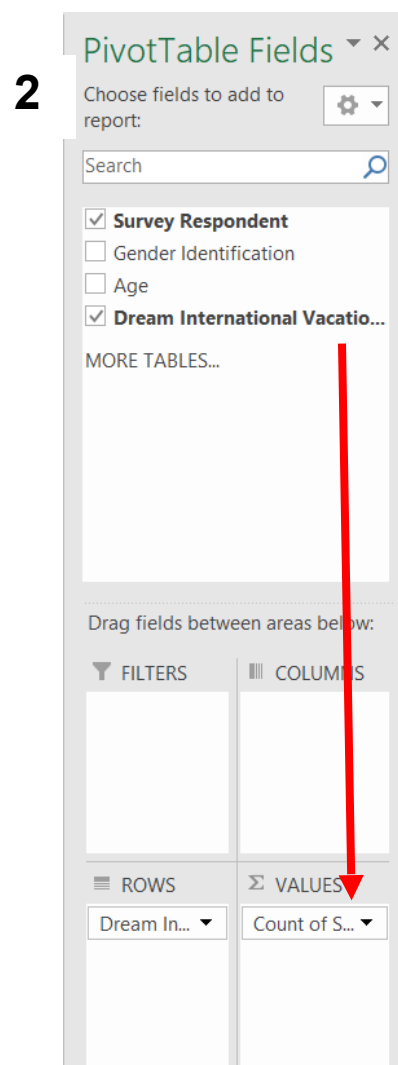
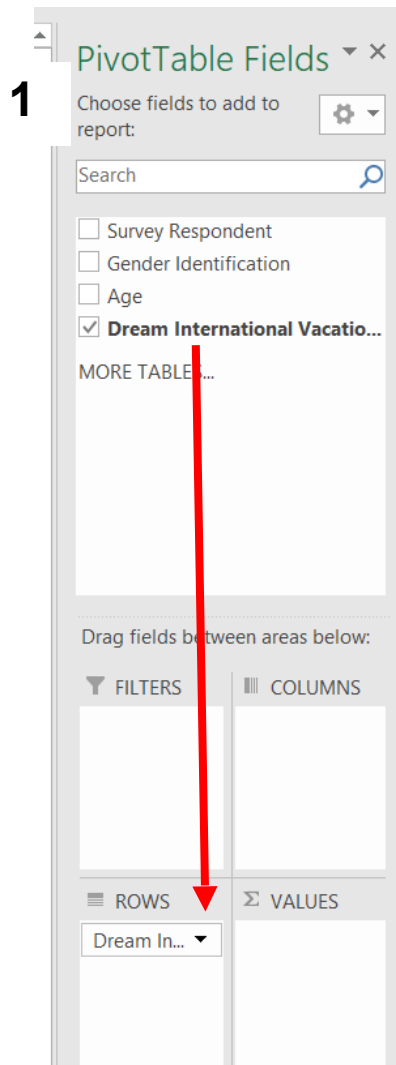


Excel will redirect you to the New Worksheet, a blank PivotTable will be produced, and your PivotTable Fields menu will be produced.



You will use the PivotTable Fields menu to drag and drop the variables you want in your PivotTable. For this example, you want to determine which international vacation destination is the most popular amongst Respondents. You also want to filter the data based on Age and/or Gender Identification.

First, drag the Dream International Vacation Destination variable to the Rows section of the PivotTable Fields menu (1). Then, drag the Survey Respondent variable to the Values section (the default value calculation on this is a Count) (2). The PivotTable now shows the 5 Travel Destinations and the Count of Survey Respondents that selected each destination (3).

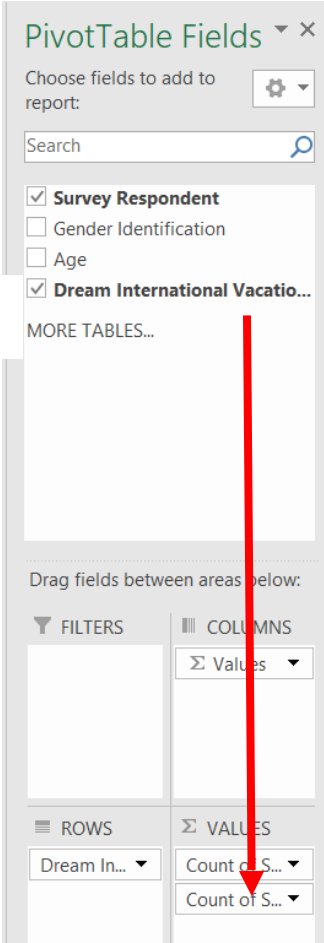


3

Row Labels	Count of Survey Respondent
Australia	82
Chile	101
China	105
Italy	100
South Africa	112
Grand Total	500

You can also have the PivotTable calculate a % of Respondents who chose to travel to each destination. Drag and drop the Survey Respondent variable to the Values section of the Field List menu for a second time (1). You will see that a 2nd column of the # of people that want to travel to each destination in the PivotTable (2). To change the Value Calculation, click on the down arrow on the 2nd Survey Respondent variable in the Field List menu (3), then select Value Field Settings (4).

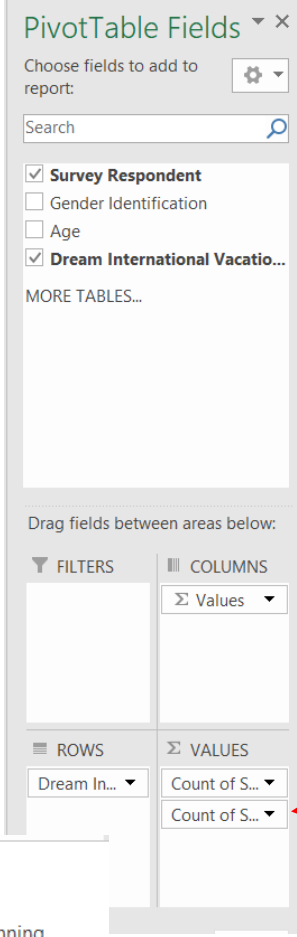
1



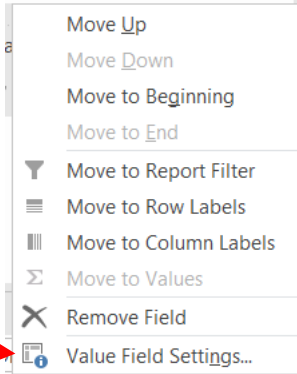
2

Row Labels	Count of Survey Respondent	Count of Survey Respondent2
Australia	82	82
Chile	101	101
China	105	105
Italy	100	100
South Africa	112	112
Grand Total	500	500

3

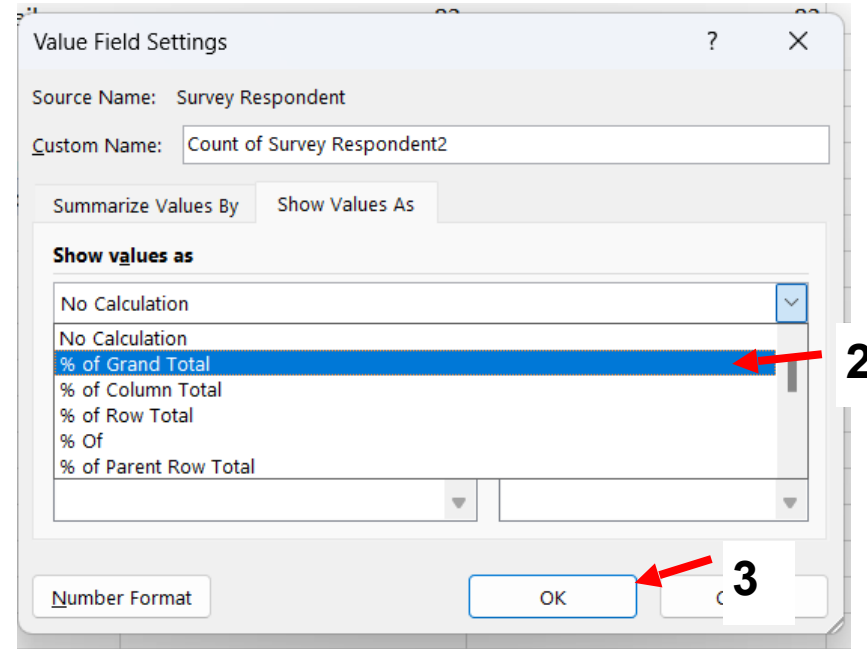
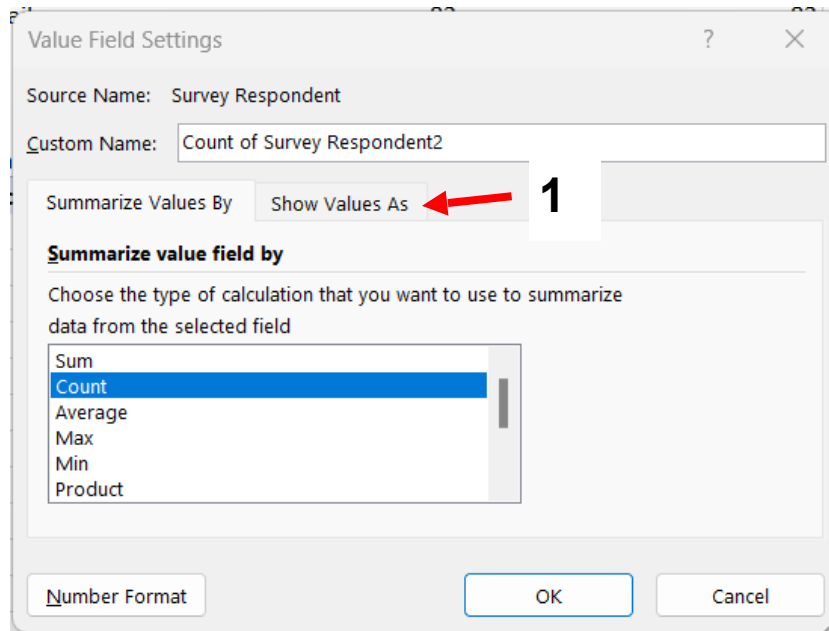


4



Move Up
Move Down
Move to Beginning
Move to End
Move to Report Filter
Move to Row Labels
Move to Column Labels
Move to Values
Remove Field
Value Field Settings...

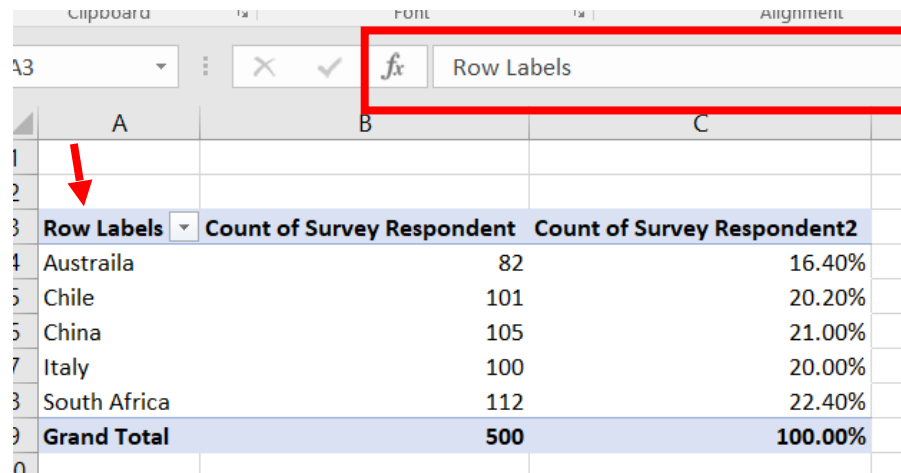
In the Value Field Settings window that appears, click on Show Value As (1). In the Show Value as drop down, change it from No Calculation to % of Grand Total (2), then click OK (3).



Row Labels	Count of Survey Respondent	Count of Survey Respondent2
Australia	82	16.40%
Chile	101	20.20%
China	105	21.00%
Italy	100	20.00%
South Africa	112	22.40%
Grand Total	500	100.00%

Your PivotTable now has the % Calculations.

You can customize the Header Labels so they are not on the Excel defaults. Click on the Header you want to change, and in the formula bar type in what you want the Header to say. You can change all 3 of the Header columns.



	A	B	C
1			
2			
3	Row Labels	Count of Survey Respondent	Count of Survey Respondent2
4	Australia	82	16.40%
5	Chile	101	20.20%
6	China	105	21.00%
7	Italy	100	20.00%
8	South Africa	112	22.40%
9	Grand Total	500	100.00%

Here is your PivotTable after changing the 3 column Headers.

Dream Vacation	# of Respondents	% of Respondents
Australia	82	16.40%
Chile	101	20.20%
China	105	21.00%
Italy	100	20.00%
South Africa	112	22.40%
Grand Total	500	100.00%

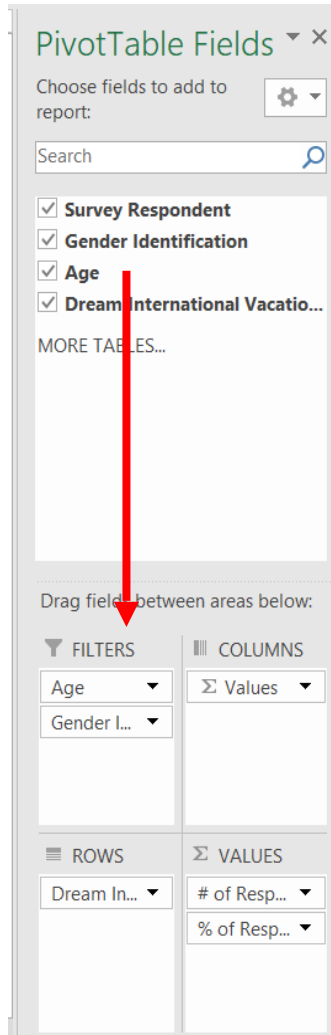
changing the 3 column

Finally, we will show you how to add two filters to the PivotTable so you can see the results based on Age and/or Gender Identification. Please note you could add this data in various ways. You could use Slicers or you could add them to the Rows section of the PivotTables Fields menu. It really comes down to how you are going to use the PivotTable, who you may be sending the PivotTable to,

what data you are trying to highlight, or just personal preference. Either way, find what works best for you and/or your audience. Play around with the options and see which way you like best.

To add the two filters, drag and drop Age and Gender Identification into the Filters section of the PivotTable Fields menu (1). The filters now appear above the data table, and you can click on the down arrows on the filters to display the data based on your selections (2). The result of this is seen here (3).

1



2

Age	(All)	
Gender Identification	(All)	
Dream Vacation	# of Respondents	% of Respondents
Australia	82	16.40%
Chile	101	20.20%
China	105	21.00%
Italy	100	20.00%
South Africa	112	22.40%
Grand Total	500	100.00%

3

Age	18-29	
Gender Identification	Female	
Dream Vacation	# of Respondents	% of Respondents
Australia	9	18.37%
Chile	9	18.37%
China	9	18.37%
Italy	10	20.41%
South Africa	12	24.49%
Grand Total	49	100.00%

That completes our objective of creating a simple PivotTable for the data set provided. When you return to work, see what kind of PivotTables you can create. There are many ways to produce some great PivotTables, so be creative.