1.3.1

Pivoting Toward Success

Louise is looking forward to your analysis, but she would benefit from additional visualization of the data so that she can see the outcomes of all the categories. Let's help Louise by creating summary tables, charts, and graphs.

Now we've organized our data and viewed data in the Theater category. Why not break it down even further?

There's a column in the worksheet named "Category and Subcategory," which groups a main category (such as "film and video") with all of its subcategories (like science fiction, drama, animation, and so on). We can make our data more detailed by splitting the Category and Subcategory column into two distinct columns: "Parent category" and "Subcategory." This gives us additional data to use in our analysis.

While looking at the theater data as a whole has been helpful, including more data will make our analysis even more detailed and thus generate additional insight.

Create Subcategories

Start by putting the subcategories into their own column. In the worksheet, clear all the active filters (if there are any), and then follow these steps:

1. Select the "Category and Subcategory" column.

2. Copy the column using the keyboard shortcut Command+C (Mac) or CTRL+C (Windows).

3. Paste the data into the next empty column using the keyboard shortcut Command+V (Mac) or CTRL+V (Windows).

4. Click the Data tab.

5. Click the "Text to Columns" button.

6. The "Convert Text to Columns Wizard" appears.

7. Inside the "Convert Text to Columns Wizard:"

- Select "Delimited" and click "Next."

- Uncheck the "Tab" box and check "Other."

- Place a backslash (/) in the box, then click "Next."

- Select "Text" from the "Column data format."

- Click "Finish."

Good work—you've broken down the data into more categories. Remember to name the new columns "Parent category" and "Subcategory" respectively. Let's use this new data to create a pivot table.

Pivot Tables

Pivot tables are a powerful Excel tool that condenses data into a summary that delivers information based on our questions.

This is a lot to take in, so let's build a pivot table together, step by step.

IMPORTANT

> Pivot tables and pivot charts (which we'll learn about next) are extremely versatile and powerful tools. They allow us to pick and choose the data we want to analyze and then tweak it with visual customizations. Pivot tables also let us continue to tweak the view by filtering our chosen data after it's been set to a graph.

Before we can create a pivot table, we need to know what questions we want the table to answer. Ask yourself the following:

- Which data do we want to see summarized?

- How do we want the data to be presented?

Now we have a starting point. Let's dive in! Watch and follow along with the following video to learn more about pivot tables. Choose the video that corresponds to your operating system.
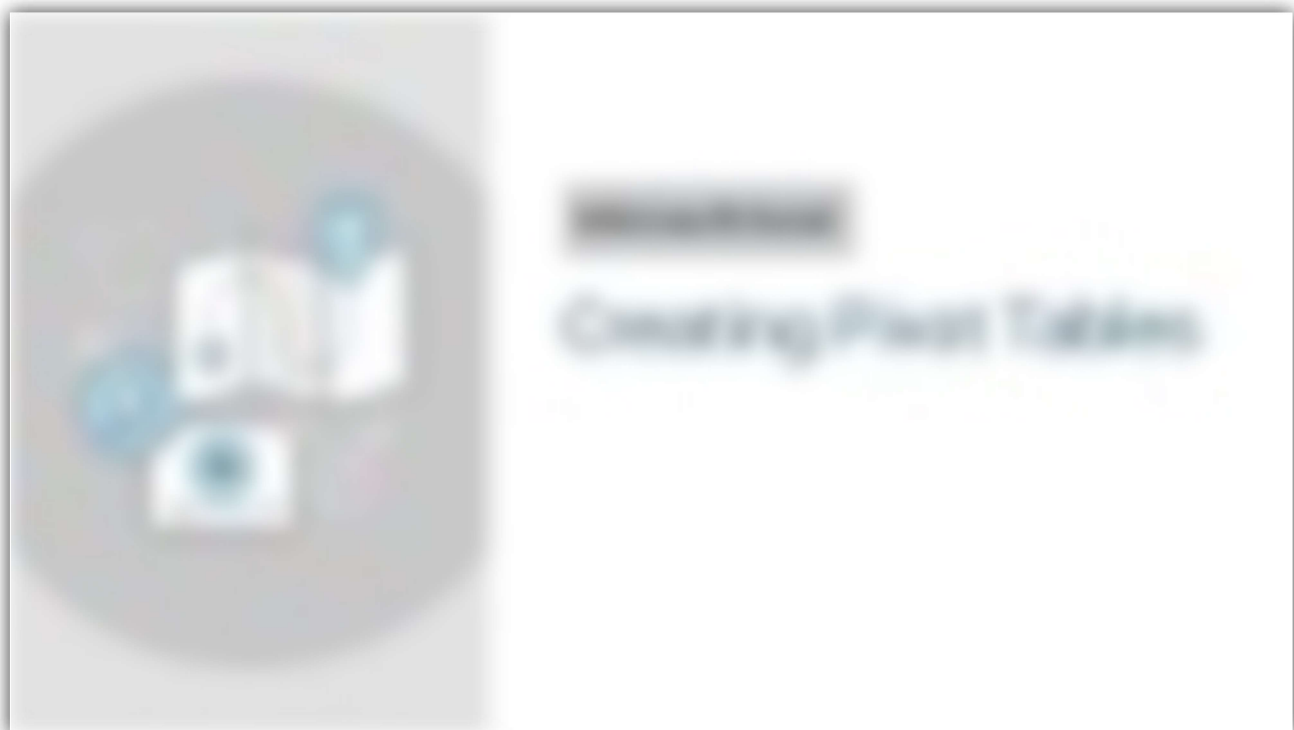
macOS

IMPORTANT

> There is an issue with some versions of Excel 2016 for Mac. Make sure you update your Excel to the latest available version.

Windows

Experiment with the pivot table you just created by switching the **outcomes** to rows and the **parent category** to columns. Note that the information is still being delivered, but it's displayed differently. However, the first version of the pivot table was more compact and easier to read, so let's switch back.

FINDING

If we filter for only the United States campaigns, we will find that there were 525 successful theater Kickstarters.

SKILL DRILL

Sometimes creating pivot tables requires some experimentation. Feel free to experiment by creating a new pivot table and switching the row and column fields, adding multiple items to multiple fields, or even using a different value.