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Modifying a Geodemographic Classification of the e-Society using public feedback

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Modifying a Geodemographic Classification of the e-Society using public feedback

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Abstract

The e-Society geodemographic classification (Longley et al., 2008) categories neighbourhoods based on their engagement with new information communication technologies. This classification was launched online in 2006, and allowed users to both view and comment on the accuracy of their assigned neighbourhood Type. This paper utilises the user generated feedback on the accuracy of the e-Society classification and through external validation calculates their accuracy. The pilot methodology developed in this paper is scalable and could be repeated for any classification. We believe that this methodology gives the recipients of these classification procedures a voice that their concerns of classification accuracy can be heard.

Introduction and Background

The UCL "e-Society" classification (Longley et al., 2008) was created in 2005 as part of an ESRC funded project to examine the impact of new information and communication technologies (NICT) on the spatial organisation of the "digital divide". Using an industry standard construction methodology (Webber and Farr, 2001) this research produced a bespoke geodemographic classification designed to measure the digital differentiation (Burrows and Gane, 2006) between the use and engagement of NICT at a local scale. In general terms, geodemographic classification represent an "analysis of people by where they live" (Sleight, 1997:16), therefore categorising people into similar behavioural groups using their domicile; typically at the unit postcode or Output Area level. Geodemographic classification are used by the majority of enterprises in the UK for strategic marketing through the local targeting an engagement with their potential customers (Harris et al., 2005). Outside of these commercial applications geodemographic classification are showing a renaissance in applications for public service delivery (Longley, 2005) with examples across Education (Singleton and Longley, 2008, Harris et al., 2007, Batey et al., 1999), Health (Shelton et al., 2006) and Policing (Ashby and Longley, 2005). Using the e-Society classification a website was built (http://www.spatialliteracy.org/esocietyprofiler/) which enabled users to enter their postcode and be presented with their corresponding e-Society Group and Type alongside rich descriptions of the typical characteristics of the people who live within these areas. This classification hierarchy is presented in Table 1.

Table 1: The E-Society Classification Hierarchy (Longley and Singleton, 2008)

-Society Type	e-Society Type Postcode Frequency	e-Society Group Postcode Frequency
	(percent)	(percent)
A01 Low technologists	128807 (6.9)	440824 (23.5)

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A02 Cable suffices	57166 (3.0)	
A03 Technology as fantasy	77951 (4.2)	
A04 Mobile's the limit	113553 (6.1)	<u> </u>
A05 Too old to be bothered	14851 (0.8)	
A06 Elderly marginalised	48496 (2.6)	
B07 The Net; What's that?	10978 (0.6)	
B08 Mobile Explorers	34719 (1.9)	114098 (6.1)
B09 Cable TV heartland	68401 (3.6)	
C10 E-bookers and communicators	46176 (2.5)	00062 (4.9)
C11 Peer group adopters	43686 (2.3)	89862 (4.8)
D12 Small time net shoppers	183282 (9.8)	20045 ((15.5)
D13 E for entertainment	107174 (5.7)	290456 (15.5)
E14 Rational utilitarians	98777 (5.3)	
E15 Committed learners	26698 (1.4)	181396 (9.7)
E16 Light users	55921 (3.0)	<u> </u>
F17 Computer magazine readers	55803 (3.0)	
F18 E for financial management	5561 (0.3)	
F19 On-line apparel purchasers	60380 (3.2)	161825 (8.6)
F20 E-exploring for fun	40081 (2.1)	
G21 Electronic orderers	78952 (4.2)	78952 (4.2)
H22 E-committed	37380 (2.0)	
H23 E - professionals	7362 (0.4)	44742 (2.4)

Unknown and Business Postcodes = 473879 (25.3)

Once the website development was complete a press release was given. This was picked up by BBC Online news team on 8th August 2006 (BBC, 2006). This publicity generated a huge amount of interest in the website, including 20,694 unique visits to the site on the afternoon of the 8th and a further 22,113 hits the following day. For a full write up of this activity see Longley and Singleton (2008).

The e-Society website offers the general public a tool to view their unit postcode assigned geodemographic Type and is similar to a service offered by the commercial classification builder CACI¹. This company have provided their classification to the website UpmyStreet² which enables the public to view their ACORN Type assignment. We believe this website sets a good example in the commercial geodemographic industry by openly enabling a user to view their assigned Type. Where an assigned Type is erroneous, people living within these unit postcodes may experience discriminatory effects through mis-targeting by service providers (users of the

classification). This problem is perhaps less serious in private sector applications such as the targeting of financial products, however, the problem of mis-classification can be far more harmful in public sector use where real life chances may be wrongly apportioned due to erroneous Type assignments(Singleton and Longley, 2008). For this reason, we believe that it is paramount that geodemographic classification builders should provide the public with a mechanism through which they can supply feedback on their assignment, and that through this feedback classification builders can investigate the validity of these claims. Although CACI provide the general public with a method of accessing their classification, there are not structured way in which users can submit feedback on these assignments.

The e-Society website presents a tool which allows users to give feedback relating to the accuracy of their assigned classification Group and Type. After a user has entered their postcode, they are presented with a message enquiring whether they agreed with our assignment. If not, they can enter the hierarchical Group and Type which they feel better represents their neighbourhood. These results are written up in full in Longley and Singleton (2008) so will not be repeated here, however for a summary overview the differences between our predicted e-Society Group assignment and the user generate feedback are summarized in Table 2.

Table 2: Predicted versus Feedback e-Society Group Assignment (source: Longley and Singleton, 2008)

	•	Feedback Group Frequency & Percentages								
	•	A	В	С	D	E	F	G	Н	SUM
	A	28	47	179	215	294	158	59	322	1302
es		(2.2)	(3.6)	(13.7)	(16.5)	(22.6)	(12.1)	(4.5)	(24.7)	(100)
Percentages	В	0	6	31	29	46	20	5	72	209
Sen		(0.0)	(2.9)	(14.8)	(13.9)	(22.0)	(9.6)	(2.4)	(34.4)	(100)
erc	C	3	2	8	13	26	22	4	123	201
& P		(1.5)	(1.0)	(4.0)	(6.5)	(12.9)	(10.9)	(2.0)	(61.2)	(100)
× ×	D	2	5	6	14	87	60	18	259	451
Group Frequency		(0.4)	(1.1)	(1.3)	(3.1)	(19.3)	(13.3)	(4.0)	(57.4)	(100)
ant	\mathbf{E}	4	1	5	7	23	28	8	110	186
ŗ		(2.2)	(0.5)	(2.7)	(3.8)	(12.4)	(15.1)	(4.3)	(59.1)	(100)
ρF	\mathbf{F}	2	2	0	4	10	25	8	115	166
O n		(1.2)	(1.2)	(0.0)	(2.4)	(6.0)	(15.1)	(4.8)	(69.3)	(100)
Ġ	G	0	2	3	4	13	19	2	112	155
		(0.0)	(1.3)	(1.9)	(2.6)	(8.4)	(12.3)	(1.3)	(72.3)	(100)
Predicted	H	1	0	0	1	2	1	0	32	37
pa.		(2.7)	(0.0)	(0.0)	(2.7)	(5.4)	(2.7)	(0.0)	(86.5)	(100)
$\mathbf{P}_{\mathbf{I}}$	Unknown	34	31	46	116	203	172	75	568	1245
		(2.7)	(2.5)	(3.7)	(9.3)	(16.3)	(13.8)	(6.0)	(45.6)	(100)
	SUM	74	96	278	403	704	505	179	1713	3952

The most significant finding of these feedback was that 48% of all feedback related to the 'e-unengaged' Group (Longley and Singleton, 2008), and the public response highlighted that there clearly had been a large misallocation of neighbourhoods to this group. In this paper we aim to present an analysis of how the e-Society feedback, and geodemographic feedback in general can be validated for their appropriateness, and present a pilot methodology whereby public feedback can be used to re-assign geodemographic classification cluster assignments.

Methodology

The re-assignment methodology used a series of heuristic checks to assess the validity of the user generated feedback and were built in the macro language of the statistics software SAS³. The first check tested whether the

feedback was from a valid a residential address. This is important because the classification relates to people living within neighbourhoods, however, despite this being explained on the website some users entered feedback for postcodes that were non residential.

Within a unit postcode there can be multiple postal delivery points which can relate to a mixture of both residential or businesses delivery points. The current classification and feedback tool uses only postcodes in the classification assignment and it is therefore impossible to know which type of address a person is referring to when they have entered their feedback, and as such, some checks were required to assess the probability that the address is residential. Therefore, the first heuristic checks the distribution of postal delivery points within with unit postcode using the National Statistics Postcode Directory (NSPD)⁴. This was appended onto the feedback unit postcodes, and where more than fifty percent of the delivery points were categorised as businesses, the feedback was marked as unreliable. Furthermore, additional checks were run to make sure the unit postcode was a non P.O Box address, a single large user delivery point (predominantly businesses) or a terminated postcode. These additional checks provide extra assurance that the feedback was for a current and valid postcode and contained delivery points of residential status.

Outside of the residential address checks, the main heuristic for assessing the classification validity uses ACORN, a commercial geodemographic classification from CACI. ACORN was selected above other commercial classifications which the authors have access to as it appends at the same scale as the collected feedback and is independent of those Experian data used to construct the e-Society classification (Longley et al., 2008). Using an independent classification to perform this external validation aims to prevent circularity in the checks through sharing of the same or similar input data and design methodology.

The ACORN classification divides neighbourhoods into three hierarchies consisting of five categories which divide into 17 Groups and then into a further 56 Types (not shown) (See Table 3). The names within the typology are designed to be memorable for end users of the classification and provide a broad description of the people who typically live within these areas.

Table 3: ACORN Category and Groups (Source: CACI, (2005)

ACORN Category	ACORN Group	% UK Pop
	A Wealthy Executives	8.6
Wealthy Achievers	B Affluent Greys	7.9
	C Flourishing Families	9.0
	D Prosperous Professionals	2.1
Urban Prosperity	E Educated Urbanites	5.5
	F Aspiring Singles	3.8
	G Starting Out	3.1
Comfortably Off	H Secure Families	15.5
Connortably Off	I Settled Suburbia	6.1
	J Prudent Pensioners	2.7
	K Asian Communities	1.5
Moderate Means	L Post-Industrial Families	4.7
	M Blue Collar Roots	7.5
Hard-Pressed	N Struggling Families	13.3

O Burdened Singles	4.2
P High Rise Hardship	1.6
Q Inner City Adversity	2.1

Index scores were calculated for the distribution of ACORN Types within each e-Society Type. The results from this analysis are shown in Table 4 as a matrix of index scores. The index scores are calculated by dividing the percentage of postcodes in an ACORN Type within an e-Society Type, against the distribution of the same ACORN Type but within the total population. This ratio is multiplied by 100 to give an index score where 100 represents the national average. Thus, a score of 50 demonstrates an ACORN type that is half as represented as the national average within an e-Society Type, and a score of 200, twice the national average. In Table 4 index scores over 120 (considered over represented) are highlighted in grey. These grey coloured scores show which unit postcodes are categorized by similar geodemographic types across the two classifications.

Table 4: Cross Tabulation of ACORN Types with e-Society Types in England

At West Professions, large houses 18 9 9 143 12 143 8 8 16 10 10 1 16 13 12 18 18 18 18 18 18 18 18 18 18 18 18 18	122 H22 62 4 53 1 45 1 28 1 31 2 31 3 31 3 31 3 32 2 22 2 38 5 166 2 2570 8 618 8 661 5 640 7 529 3 675 64 1 339 7 710 7
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A Weathy working fundings with mortgages 12 14 41 17 48 12	45 1 28 1 3 3 3 3 3 3 4 3 5 5 1 1 8 5 5 5 6 6 0 7 5 2 9 3 3 6 7 5 4 4 2 1 6 1 1 7 1 7 1 7 1 7 1 7 1 7 1 7 1 7 1
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G25White-collar singles/sharers, terraces 67 47 46 44 114 75 133 101 197 222 411 174 62 26 45 44 39 192 121 77 153	328
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1120 Totaliger winderconductour pics with mortgages 31 45 35 17 30 31 45 30 31 45 30 32 1	148
H27Midde income, home owning areas 104 83 153 59 130 46 119 71 19 87 53 150 55 145 137 137 134 134 151 107 144	56
H28 Working families with mortgages 39 122 32 22 27 11 45 39 12 44 27 373 118 26 168 164 89 44 189 49 191	25
H29 Mature families in suburban semis 125 290 175 56 97 22 71 26 10 34 25 299 83 31 220 306 142 99 76 38 145	19
H30 Established home owning workers 193 297 53 112 45 49 57 66 44 48 54 226 227 27 87 133 28 43 84 18 70 H31 Home owning Asian family areas 19 66 26 24 67 28 99 77 184 124 156 275 120 28 89 50 133 324 84 96 182	93
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133 Middle income, adder couples 306 356 216 127 197 45 67 32 10 31 25 132 66 48 138 248 60 60 60 66 27 69 134 Lower incomes, adder people, semis 291 200 111 256 125 118 81 81 81 81 81 95 54 106 100 69 72 98 31 90 78 25 65	21
J35 Elderly singles, purpose built flats 111 22 72 270 374 470 111 77 32 180 124 26 21 28 33 69 33 80 47 68 55	170
J36 Older people, flats 148 59 99 163 209 201 143 97 45 175 147 88 49 58 74 83 58 110 92 62 90	119
K37 Crowded A sian terrares 4 12 2 12 3 37 10 103 1127 95 404 40 200 9 36 3 17 74 28 29 42	154 1
K38 Low income A sian families 12 25 2 29 9 64 42 190 892 102 452 68 197 4 19 5 3 20 21 11 37	120
L39Skilled older fimilies, terraces 75 157 32 47 58 37 73 72 89 76 113 364 171 17 75 87 48 106 108 38 141	42
L40Young working families 86 235 9 69 14 66 59 135 177 57 68 163 549 6 26 28 5 11 60 23 37	24
M41 Skilled workers, semis and terraces 160 149 38 116 62 87 93 119 111 105 138 177 299 28 43 59 17 55 94 23 72	49
M42Home owning families, terraces 106 132 10 108 28 108 72 144 334 87 264 170 319 10 19 22 4 4 43 46 8 44	47
M43Oldier people, rented terraces 117 102 15 181 41 178 101 151 254 134 316 82 146 11 15 18 5 34 46 14 46	97
X44 Low income larger families, semis 200 261 28 167 30 104 89 151 125 52 47 122 385 22 41 51 12 26 59 14 34	18
N4S-Low income, older people, smaller semis 262 215 26 880 45 201 103 161 133 54 73 67 218 16 27 38 8 18 39 9 27	17
Nata Low income, routine jobs, terraces and flust 187 266 14 176 16 156 146 291 240 97 108 67 343 9 19 21 4 19 57 13 34	41
174 263 6 213 11 202 110 199 329 38 83 41 353 4 9 10 1 9 19 3 12	15
N48 Families and single parents, semis and terraces 113 216 4 215 6 263 182 440 450 68 77 29 375 2 11 9 1 4 30 3 13	16
X49 Large families and single parents, many children 54 185 4 56 6 159 113 485 366 114 54 54 50 4 13 11 2 8 77 14 22	17
OSI Single childry people, council flats 135 95 20 496 53 376 115 165 146 81 144 35 98 13 17 23 6 18 28 9 26	44
OSI Single parents and pensioners, council terraces 115 144 4 323 11 338 174 309 384 63 121 20 179 3 11 7 11 17 15 3 10	23
OS2 Families and single parents, council flats 59 108 5 186 15 386 384 613 502 111 246 22 183 3 9 12 1 25 19 6 13	51
PSOId people, many high-rise flats 34 30 7 355 44 758 139 119 137 101 243 8 31 6 8 6 3 19 7 9 13	104
PS4 Singles and single parents, high-rise estates 29 46 3 227 23 500 259 352 116 366 12 60 4 8 8 2 25 10 12 14	118
Q55 Multi-ethnic purpose built estates 25 19 4 107 40 319 211 433 440 318 289 19 52 3 17 6 5 181 14 61 25	221 1
Q56 Multiethnic crowded lats 18 28 2 50 13 160 274 615 577 325 249 30 102 4 25 6 6 6 138 25 39 35	183 1

These index scores are used to calculate the validity of the user feedback assignments based on the distribution of the ACORN classification within an e-Society Type. The algorithm examines the feedback postcode, encodes this with an ACORN Type and then selects the intersection from Table 4 between this and the proposed user feedback e-society Type. The selected index score represents the propensity that the ACORN classification of this postcode typically is represented in the feedback e-Society Type nationally. The index score is then ranked within the same e-Society Type column, and if the index score is ranked within the top ten highest scores then the feedback is assumed to be valid. This process validates the feedback e-Society Type based on the ACORN Type assignment of the same postcode, that is, if an ACORN classified neighbourhood typically (across

England) shows an over representation of the user assigned feedback e-Society type, then the feedback is probably an approximately correct choice, and as such the classification should be changed for this postcode. This ranking could be adjusted if desired to make the reassignment more or less sensitive depending on the level of feedback received. After trying a number of different calibrations, a ranking of ten demonstrated an approximate level of reassignment which was deemed acceptable against the total feedback received. However, as with many decisions in the construction of geodemographic classification themselves, such as the frequency of Types, the selection of this specific calibration is based on personal judgement.

Results and Discussion

The heuristics were run across all feedback postcodes and 845 (21.4%) of the feedback observations given were deemed reliable. The full results from this feedback reliability assessment are shown in Table 5. Of the 3952 feedback observations which were assessed, 165 could not be matched with the AFPD. These addresses had either been erroneously entered by the user or were new postcodes which post dated the construction of the e-Society classification. 158 (4%) of the feedback were for large user postcodes that contain a single delivery point which received over 500 items of mail a day. 83 (2.1%) of the feedback related to terminated postcodes, i.e. those postcodes which are no longer in use. 79 (2.0%) of the feedback were for postcodes which contained multiple delivery points that were predominantly non-residential.

Once the ACORN based heuristic was run on the valid feedback postcodes, 845 (21.4%) of total feedback were considered valid. These changes referenced postcodes across all e-Society types (See Figure 1), and Figure 2 shows the frequencies of the new user assigned and externally validated e-Society Types.

Table 5: Feedback Reliability Assessment Results

	n	%
Large Users	158	4.0
Terminated	83	2.1
P.O. Box	12	0.3
Predominately Business Addresses	79	2.0
Unmatched	165	4.2
Reliable feedback (ACORN)	954	24.1
Unreliable feedback (ACORN)	2998	75.9
Unreliable feedback (ACORN & Postcode)	3107	78.6
Reliable feedback (ACORN & Postcode)	845	21.4

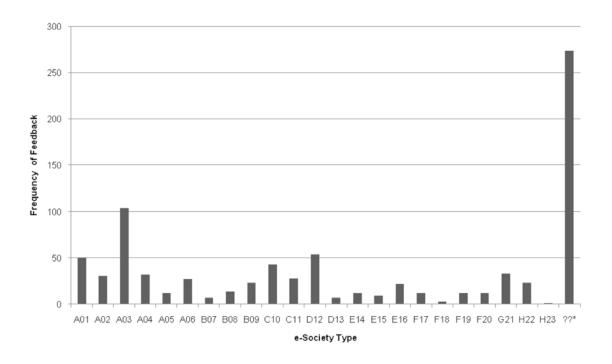


Figure 1: The frequency of original e-Society Types where valid user feedback was given

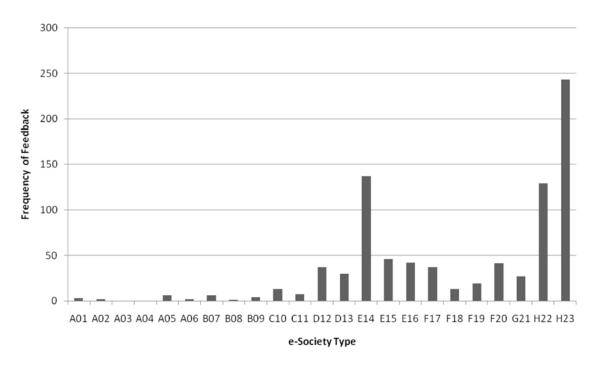


Figure 2: The new frequency of e-Society Types assignments where valid user feedback was given

Once the percentage of the successful feedback is compared against all feedback within each Postcode Area, the main region of successful feedback occurs in and around London (See Figure 3). This spatial clustering of successful feedback is interesting and may show a general awareness among the population in these areas of the type neighbourhood that they live within. However, two of the central Postcode Areas (EC and WC) show lower feedback success, as shown on the inset map of London in Figure 3. In these areas, the density of addresses related to businesses will be high, and after examining the rejected feedback it is found that in EC 46.7% and in WC 56.25% of the feedback in these Postcode Areas was rejected as being for predominantly non residential or business postcodes.

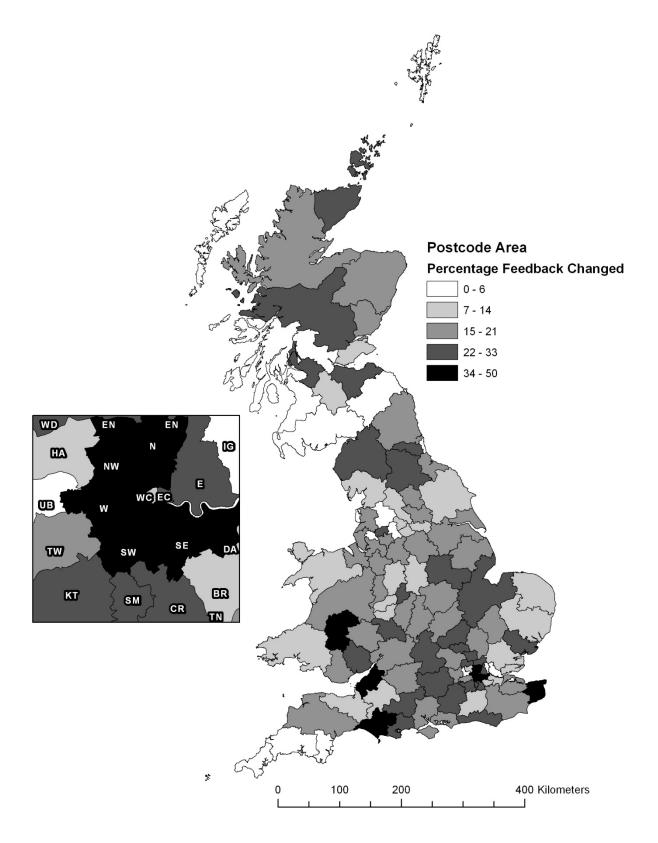


Figure 3: The percentage of the feedback successfully validated by Postal Area

In order to further investigate the underlying characteristics of the people who gave successfully validated feedback, a further set of index scores were calculated by Acorn Types. There appears to be an over

representation of those Types representing affluent neighbourhoods, and perhaps due to a higher level of education the people living in these areas made more considered feedback reassignments. This hypothesis is also supported by the overrepresentation of all Types within the Group "Educated Urbanites", and also the Types "Student flats and cosmopolitan sharers" and "Student terraces". Outside of these more affluent and highly educated neighbourhoods, the Types "Families and single parents, semis and terraces" and "Large families and single parents, many children" were also overrepresented.

Table 6: Weighted Index scores and counts of validated feedback by ACORN

	ACORN Typology		Va	lidated
Categories	Groups	Types	n	Index
		Wealthy mature professionals, large houses	75	268
	Wleb F	Wealthy working families with mortgages	22	84
	Wealthy Executives	Villages with wealthy commuters	41	143
		Well-off managers, larger houses	29	138
		Older affluent professionals	28	132
W7 1/1 A 1 '	A SGI A G	Farming communities	18	88
Wealthy Achievers	Affluent Greys	Old people, detached homes	22	86
		Mature couples, smaller detached homes	15	82
		Older families, prosperous suburbs	27	118
	El . 1. E . 1.	Well-off working families with mortgages	17	86
	Flourishing Families	Well-off managers, detached houses	32	118
		Large families and houses in rural areas	0	0
	D D C : 1	Well-off professionals, larger houses and converted flats	36	205
	Prosperous Professionals	Older professionals in suburban houses and apartments	1	4
	Educated Urbanites	Affluent urban professionals, flats	69	283
Urban Prosperity		Prosperous young professionals, flats	75	276
		Young educated workers, flats	39	231
		Multi-ethnic young, converted flats	25	217
		Suburban privately renting professionals	87	184
		Student flats and cosmopolitan sharers	20	223
	Aspiring Singles	Singles and sharers, multi-ethnic areas	3	33
		Low income singles, small rented flats	12	102
		Student terraces	5	260
Comfortably Off	Starting Out	Young couples, flats and terraces	9	117
	Starting Out	White-collar singles/sharers, terraces	13	35
		Younger white-collar couples with mortgages	13	45
		Middle income, home owning areas	18	78
	Sagura Esmilias	Working families with mortgages	4	38
	Secure Families	Mature families in suburban semis	21	81
		Established home owning workers	11	52
		Home owning Asian family areas	1	31
	Settled Suburbia	Retired home owners	1	14
		Middle income, older couples	8	33

		Lower incomes, older people, semis	N/A	N/A
	D 1 . D .	Elderly singles, purpose built flats	N/A	N/A
	Prudent Pensioners	Older people, flats	2	9
		Crowded Asian terraces	0	-
	Asian Communities	Low income Asian families	0	-
	D . I	Skilled older families, terraces	3	20
Moderate Means	Post-Industrial Families	Young working families	3	39
		Skilled workers, semis and terraces	1	6
	Blue-Collar Roots	Home owning families, terraces	2	22
		Older people, rented terraces	2	22
		Low income larger families, semis	4	32
	Struggling Families	Low income, older people, smaller semis	4	33
		Low income, routine jobs, terraces and flats	3	54
		Low income families, terraced estates	4	62
		Families and single parents, semis and terraces	7	126
		Large families and single parents, many children	4	134
Hard-Pressed		Single elderly people, council flats	1	13
	Burdened Singles	Single parents and pensioners, council terraces	1	22
		Families and single parents, council flats	3	88
	High-Rise Hardship	Old people, many high-rise flats	0	-
		Singles and single parents, high-rise estates	3	74
		Multi-ethnic purpose built estates	1	18
	Inner City Adversity	Multi-ethnic crowded flats	0	-

The pilot methodology outlined in this paper is not without limitation and is only presents a first tentative start towards updating and amendment of the classification. A general limitation of user generated feedback, and why heuristic reliability checks are so important, is that there may be a tendency for people to perceive areal classifications as predictions relating to individuals. Therefore, although the feedback may be appropriate for them personally, these assignments may nonetheless be inappropriate for the average characteristics of all those living people within their unit postcode. Indeed, this is also one of the core limitations of geodemographic classification which assign Types at an areal aggregate.

The methodology presented in this paper is a pilot and it could be refined. For example, it could be possible to use multiple geodemographic classification in the external validation procedure. However, in the example of the e-Society, we were limited to using just the postcode level Acorn because Experian data were included in the original classification and we wished to avoid circularity in our findings. Furthermore, where feedback is collected consistently over a longer period, it may be possible to weight reassignments by the frequency that changes are requested for particular postcodes. Further validation measures would require additional feedback

from the proposed Digital Inclusion site, plus E-Society codes at the level of the individual (ideally) or unit postcode breakdowns. Experian is the custodian of the tools required to create this information.

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