

How to calculate the percentage change in Pivot Table in Excel

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Pivot Table is an excellent reporting tool built into Excel. Although the main function of this table is to summarize large data, you can use them to calculate the percentage change between values. This article will show you how to calculate the percentage change in Pivot Table.

1. Use Pivot Table in the Google Docs Spreadsheet
2. Use VBA in Excel to create and repair PivotTable
3. 8 convenient tools in Excel you may not know yet

Here is an example of the sheet we will use in the lesson.

	A	B	C	D	E	F	G
1	Order ID	Order Date	Customer Name	Country	Product Category	Sales Rep	Total Sales Value
2	10342	01/01/2017	Lehmanns Marktstand	Germany	Dairy Products	Bryan Carr	£ 576.00
3	10343	01/01/2017	Save-a-lot Markets	USA	Seafood	Bryan Carr	£ 1,158.00
4	10344	01/01/2017	QUICK-Stop	Germany	Condiments	Hilary Jenkins	£ 466.80
5	10345	01/01/2017	Around the Horn	UK	Dairy Products	Jason Evans	£ 187.50
6	10346	02/01/2017	La corne d'abondance	France	Confections	Samantha Lenning	£ 405.00
7	10347	03/01/2017	Tortuga Restaurante	Mexico	Produce	Bryan Carr	£ 638.40
8	10348	03/01/2017	Queen Cozinha	Brazil	Beverages	Bryan Carr	£ 180.00
9	10349	03/01/2017	Familia Arquibaldo	Brazil	Dairy Products	Bryan Carr	£ 346.80
10	10350	03/01/2017	Trail's Head Gourmet Provisioners	USA	Beverages	Jason Evans	£ 180.00
11	10351	04/01/2017	Ernst Handel	Austria	Dairy Products	Cecile Butterworth	£ 153.60
12	10352	05/01/2017	Seven Seas Imports	UK	Dairy Products	Holly Bartholomew	£ 652.80
13	10353	06/01/2017	QUICK-Stop	Germany	Condiments	Samantha Lenning	£ 456.00
14	10354	06/01/2017	Maison Dewey	Belgium	Dairy Products	Samantha Lenning	£ 2,090.00
15	10355	07/01/2017	Comércio Mineiro	Brazil	Dairy Products	Samantha Lenning	£ 210.00
16	10356	09/01/2017	Tortuga Restaurante	Mexico	Beverages	Cecile Butterworth	£ 45.00

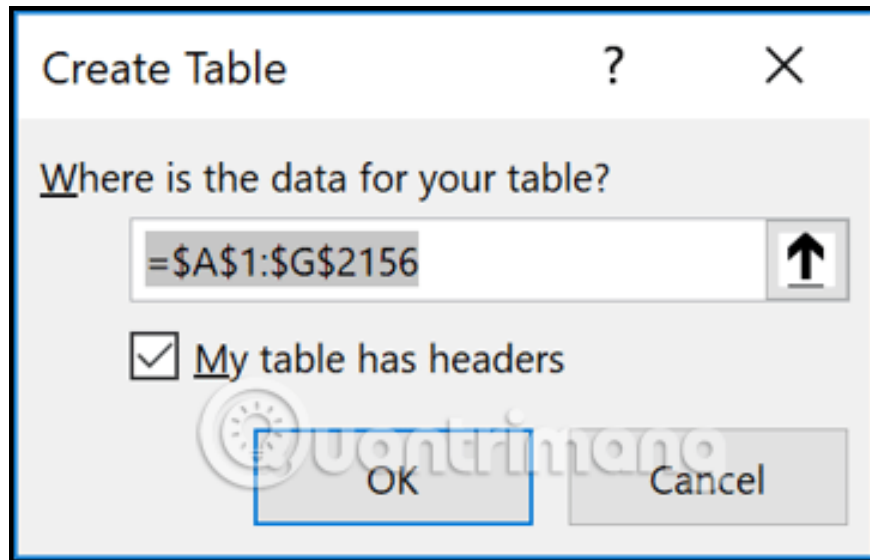
This is an example of a company's revenue table, including the order date, customer name, salesperson, total sales and some other data.

First, we will format the value range as a table in Excel and then create the Pivot Table to display the percentage change.

Format ranges in table form

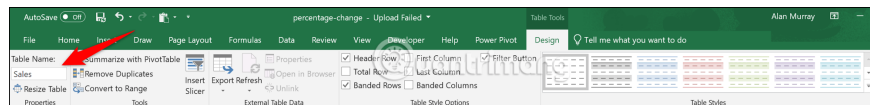
If the range of data has not been formatted as a table, you should do this. Data formatted into tables will be more convenient in the form of a worksheet cell, especially when using PivotTable.

To format the range as a table, select the cell range and click **Insert> Table** .



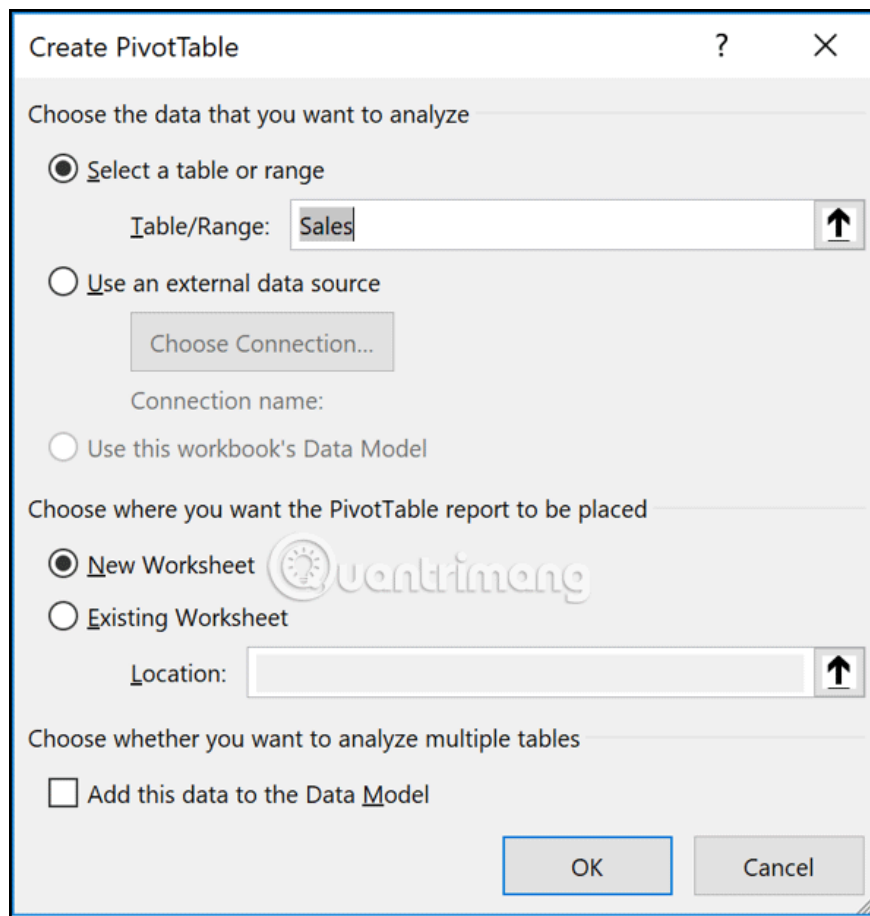
Check if the range is correct, check the **My table has header** box if there is a title in the first line of the range, then click **OK** .

Now, the range is formatted like a table. Naming tables will make it easier to reference when creating PivotTable, charts, and formulas. Click the **Design** tab in **Table Tools** and enter a name in the box in the Ribbon. This table here is named **Sales** .



Create a PivotTable to display the percentage change

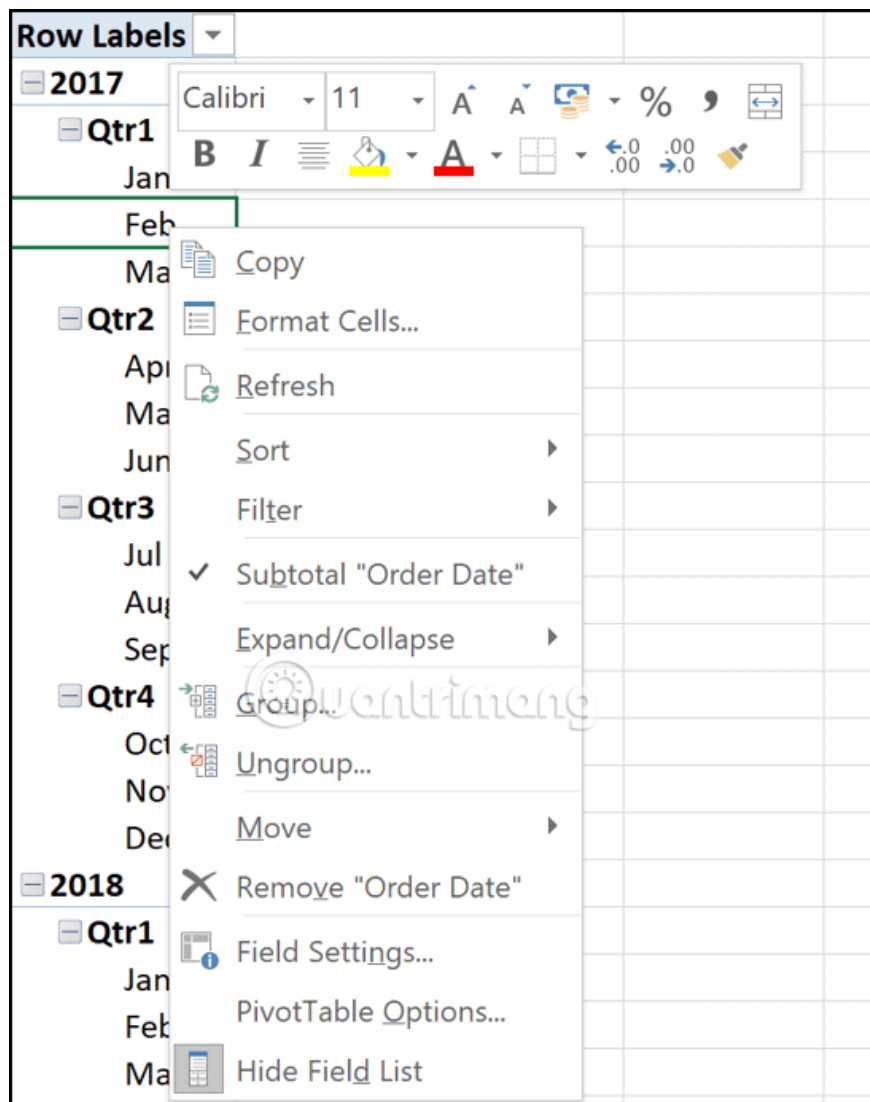
Now, let's start with creating a PivotTable. From the new table, click **Insert > PivotTable** . The Create PivotTable window will appear, it will automatically detect your table, but you can select the table or range you want to use for the PivotTable in this step.



Group of days by month

Then we will drag the date field we want to group into the row area of the PivotTable. In this example, the field named **Order Date**.

From Excel 2016 onwards, the date value will automatically be grouped by year, quarter and month. If you are using an older version or want to change the group type, right-click a cell that contains date data and then select the **Group** command.



Select the group you want to use, in this example select **Years** and **Months**.

Grouping ? X

Auto

Starting at: 01/01/2017

Ending at: 01/01/2019

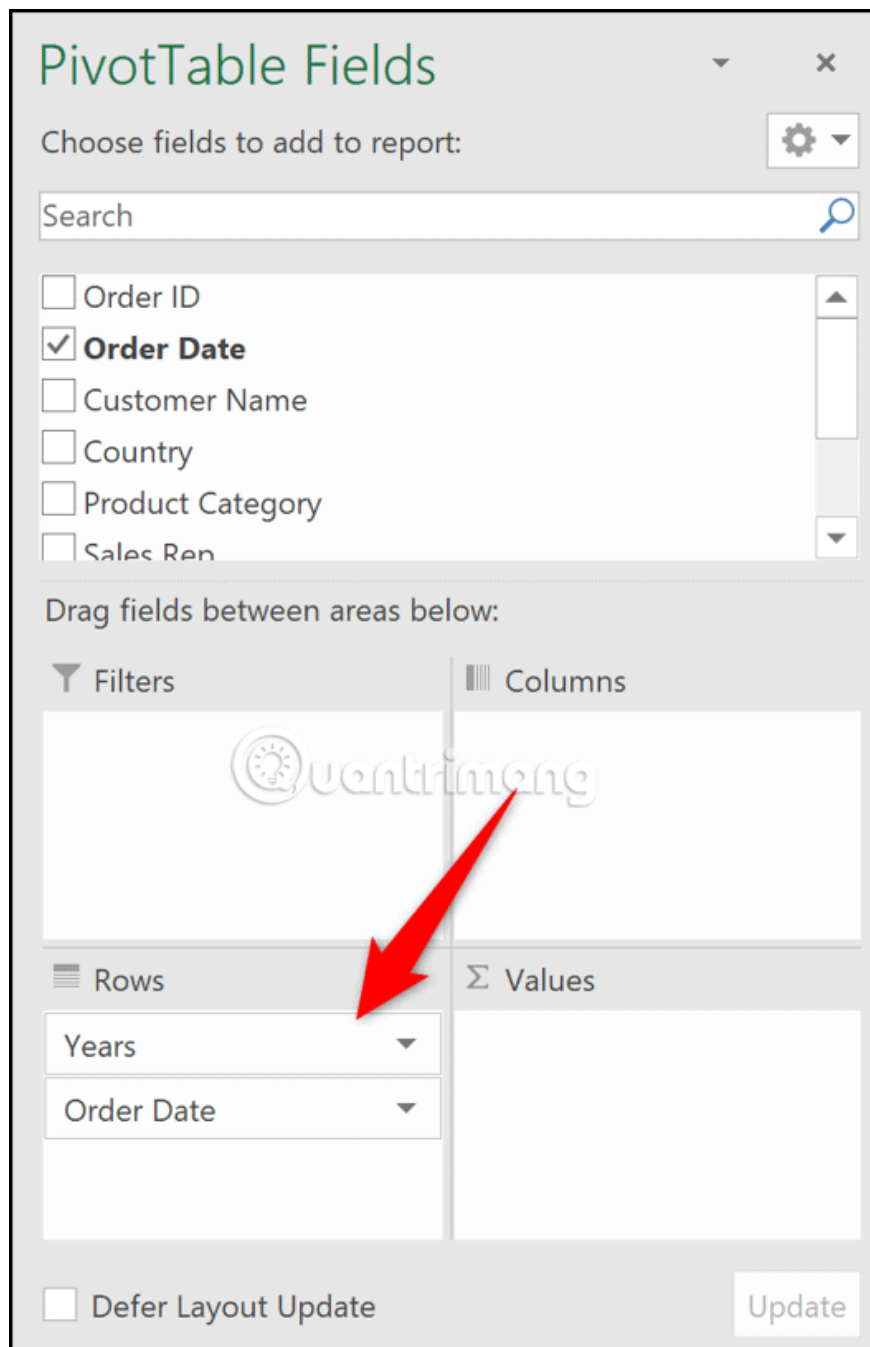
By

Seconds
Minutes
Hours
Days
Months
Quarters
Years

Number of days: 1

OK Cancel

Now we will use the **Year** and **Month** fields to analyze. The months are still named **Order Date** .



Add value fields to the PivotTable

Move **Year** from **Rows** to **Filter** , this helps users filter the PivotTable by year instead of shuffling the PivotTable with too much information. Drag the field containing the values ??(total sales in this example) you want to calculate and show the change in Values ??twice.

Years	(All)		
Row Labels		Sum of Total Sales Value	Sum of Total Sales Value2
Jan		100529.91	100529.91
Feb		105532.61	105532.61
Mar		108891.29	108891.29
Apr		120416.25	120416.25
May		123165.92	123165.92
Jun		125872.39	125872.39
Jul		125412.13	125412.13
Aug		94109.37	94109.37
Sep		118827.08	118827.08
Oct		101881.15	101881.15
Nov		119170.48	119170.48
Dec		109894.71	109894.71
Grand Total		1353703.29	1353703.29

PivotTable Fields

Choose fields to add to report:

Search

Country

Product Category

Sales Rep

Total Sales Value

Years

More Tables...

Drag fields between areas below:

Filters	Columns
Years	Σ Values
Rows	Σ Values
Order Date	Sum of Total Sales Val...
	Sum of Total Sales Val...

Defer Layout Update Update

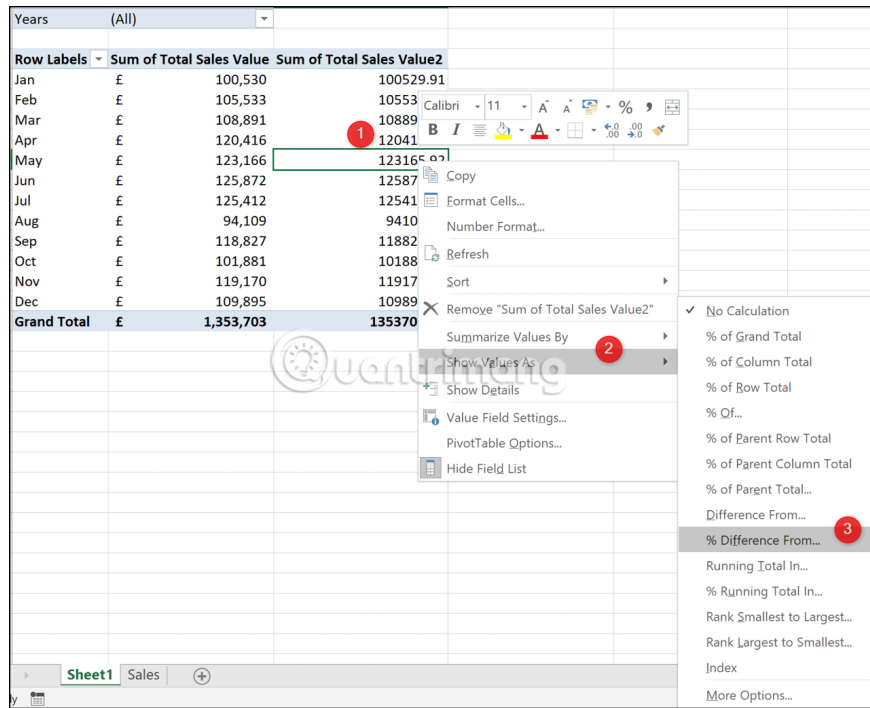
Both value fields will be defaulted to sum and currently not formatted. We will keep the values ??in the first column in the sum form and need to reformat them. Right-click on the number in the first column, select **Number Formatting** from the shortcut menu. Select **Accounting** format with decimal 0 from the **Format Cells** dialog box.

The PivotTable now looks like this:

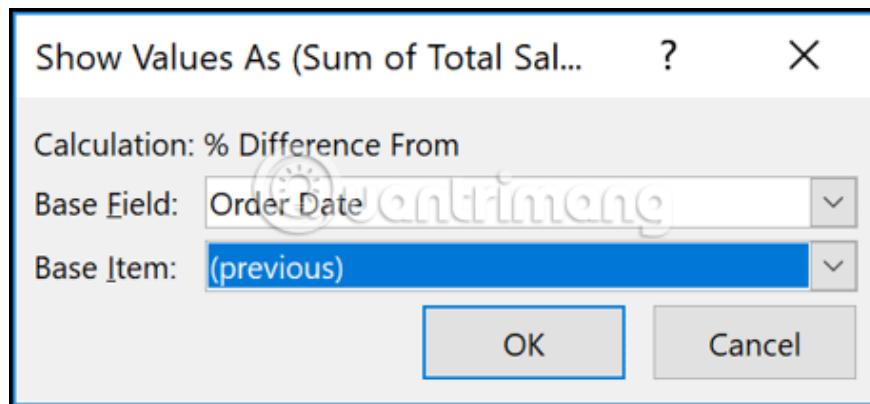
Years	(All)		
Row Labels		Sum of Total Sales Value	Sum of Total Sales Value2
Jan	£	100,530	100529.91
Feb	£	105,533	105532.61
Mar	£	108,891	108891.29
Apr	£	120,416	120416.25
May	£	123,166	123165.92
Jun	£	125,872	125872.39
Jul	£	125,412	125412.13
Aug	£	94,109	94109.37
Sep	£	118,827	118827.08
Oct	£	101,881	101881.15
Nov	£	119,170	119170.48
Dec	£	109,895	109894.71
Grand Total	£	1,353,703	1353703.29

Create a percentage change column

Right-click on a value in the second column, point to **Show Values** and then click on the option **% Difference from** .



Select **(Previous)** in **Base Item** , so that the current month value is always compared with the previous months (in the Order Date field).



The PivotTable table now displays both the value and the percentage change.

Years	(All)		
Row Labels	Sum of Total Sales Value	Sum of Total Sales Value2	
Jan	£	100,530	
Feb	£	105,533	4.98%
Mar	£	108,891	3.18%
Apr	£	120,416	10.58%
May	£	123,166	2.28%
Jun	£	125,872	2.20%
Jul	£	125,412	-0.37%
Aug	£	94,109	-24.96%
Sep	£	118,827	26.26%
Oct	£	101,881	-14.26%
Nov	£	119,170	16.97%
Dec	£	109,895	-7.78%
Grand Total	£	1,353,703	

Click on the **Row Labels** container and type **Month** as the title for that column, then click the title box for the second value column and type **Variance** .

Years	(All)		
Month	Sum of Total Sales Value	Variance	
Jan	£	100,530	
Feb	£	105,533	4.98%
Mar	£	108,891	3.18%
Apr	£	120,416	10.58%
May	£	123,166	2.28%
Jun	£	125,872	2.20%
Jul	£	125,412	-0.37%
Aug	£	94,109	-24.96%
Sep	£	118,827	26.26%
Oct	£	101,881	-14.26%
Nov	£	119,170	16.97%
Dec	£	109,895	-7.78%
Grand Total	£	1,353,703	

Add up and down arrows

To edit this PivotTable, we will add some red and blue arrows to show the increase or decrease in sales.

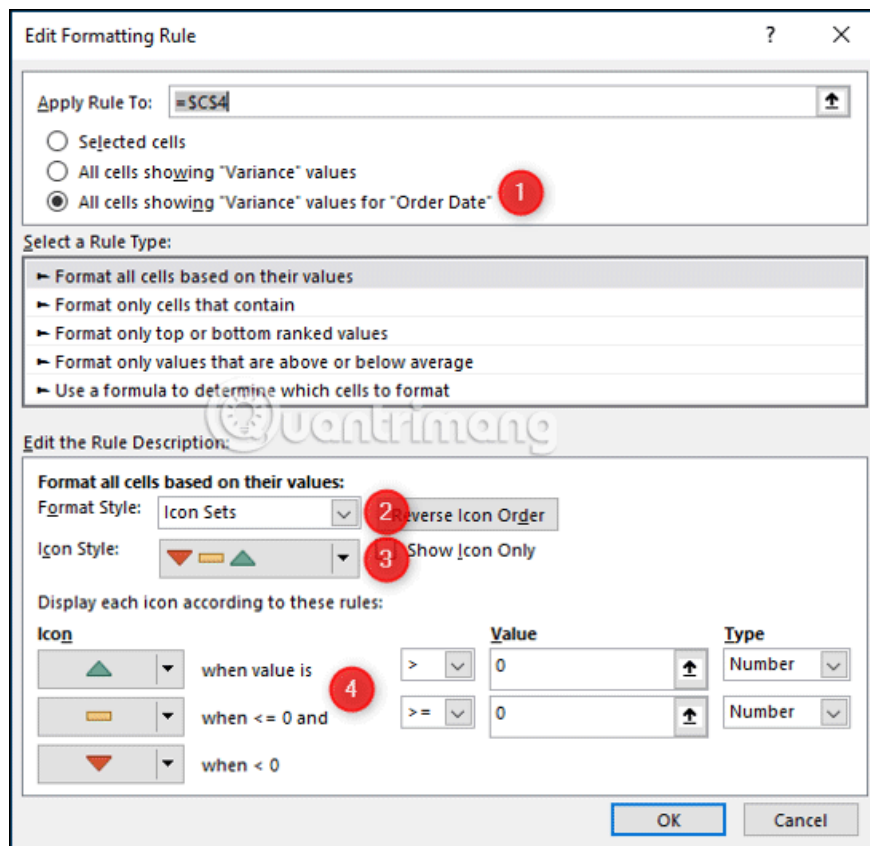
Click on any value in the second column and click on **Home > Conditional Formatting > New Rule** . In the **Edit Formatting Rule** window, follow the steps below.

Step 1 . Select **All cells showing 'Variance' values ??for Order Date** .

Step 2 . Select **Icon Sets** from the **Format Style** list.

Step 3 . Select red, blue and amber triangles from the **Icon Style** list.

Step 4 . In the **Type** column, change the **Percentage** option to **Number** to change the **Value** column to 0.



Click OK and conditional formatting is applied to PivotTable.

Years	2017		
Month	Sum of Total Sales Value	Variance	
Jan	£ 44,789		
Feb	£ 57,619	▲	28.65%
Mar	£ 56,362	▼	-2.18%
Apr	£ 61,466	▲	9.06%
May	£ 74,786	▲	21.67%
Jun	£ 55,231	▼	-26.15%
Jul	£ 67,984	▲	23.09%
Aug	£ 47,961	▼	-29.45%
Sep	£ 50,661	▲	5.63%
Oct	£ 50,800	▲	0.27%
Nov	£ 60,023	▲	18.16%
Dec	£ 65,295	▲	8.78%
Grand Total	£ 692,977		

PivotTable is an incredible tool and is one of the simplest ways to display percentage change over time for values.

I wish you all success!

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