Insurance Insights & Trends Dashboard

Key Suggestions

- The year 2022 recorded the highest number of policy sales.
- The "Adult" age group generates the highest revenue from insurance purchases
- The age group between 29 and 50 exhibits a higher prevalence of health issues, resulting in the highest number of claims.
- Regular daily exercise contributes to achieving a better health score.
- Customers with higher credit scores tend to have a more consistent and relatively lower premium amount.

Dashboard 1 ⓘ

This dashboard contains trends and visualizations showing-

-

Dashboard 2 ⓘ

This dashboard contains trends and visualizations showing-
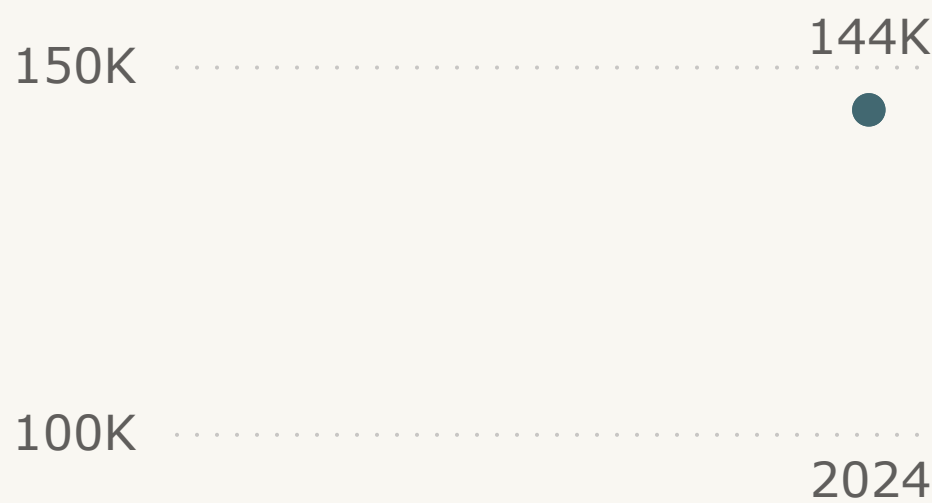
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Insurance Insights & Trends Dashboard

Area
All ⌄

Months
All ⌄

Year
2024 ⌄

KPI 1

Policy Sales Trend Over Year

144K

150K

100K

2024

Total Customers	Total Revenue
0.1M	$160M

Number of Customers by Feedback Type

60K

40K

20K

0K

55K — Average
45K — Poor
44K — Good
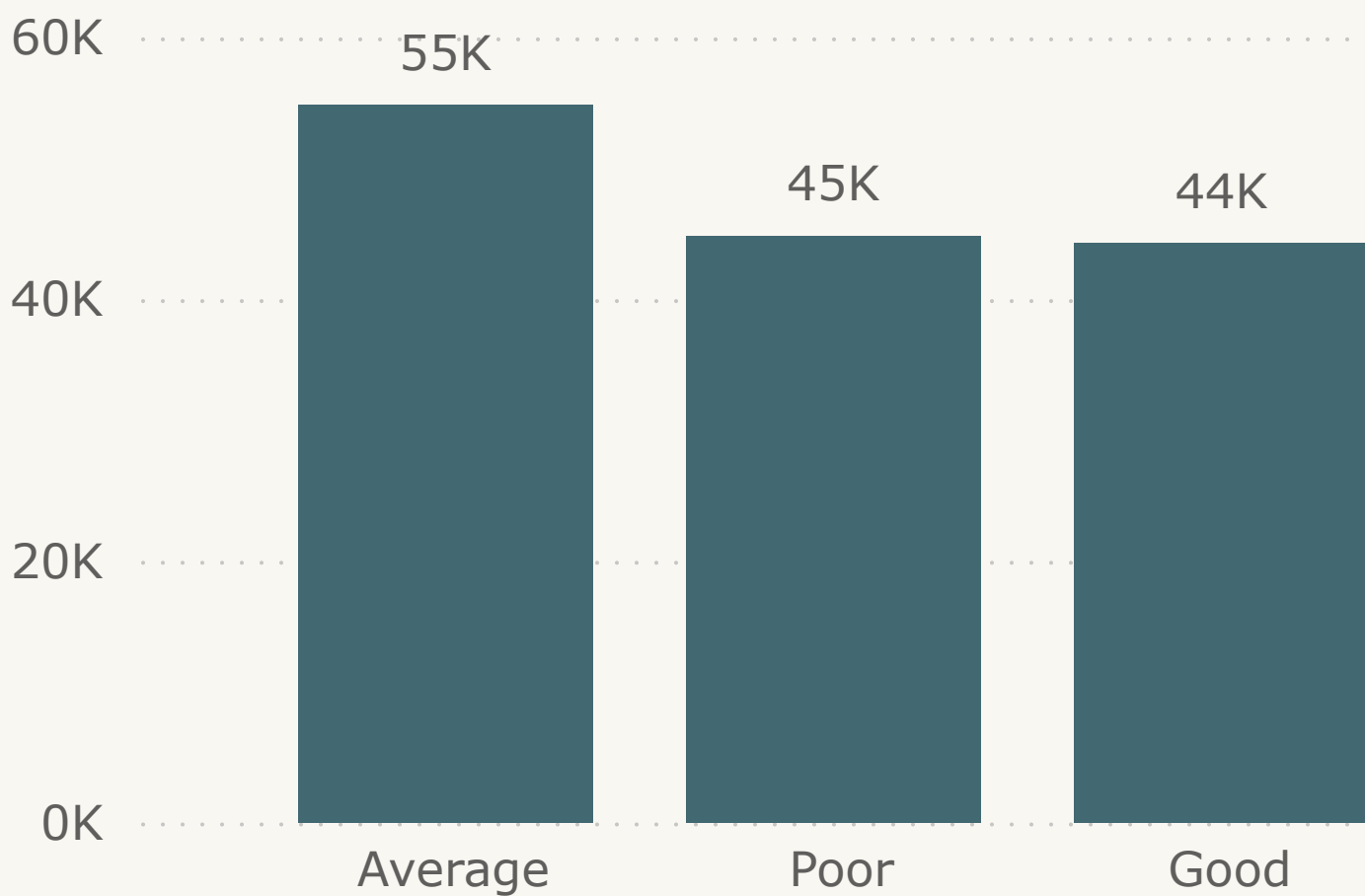
KPI 2

Average Insurance Premium Amount Over the Years

$1,400

$1,200 — **$1,109**

$1,000

$800

2024

Avg Premium Amount	Avg Insurance Dur
$1.11K	5

Avg Credit Score vs Premium Amount

Premium Amount

$4K

$2K

$0K

400   600   800
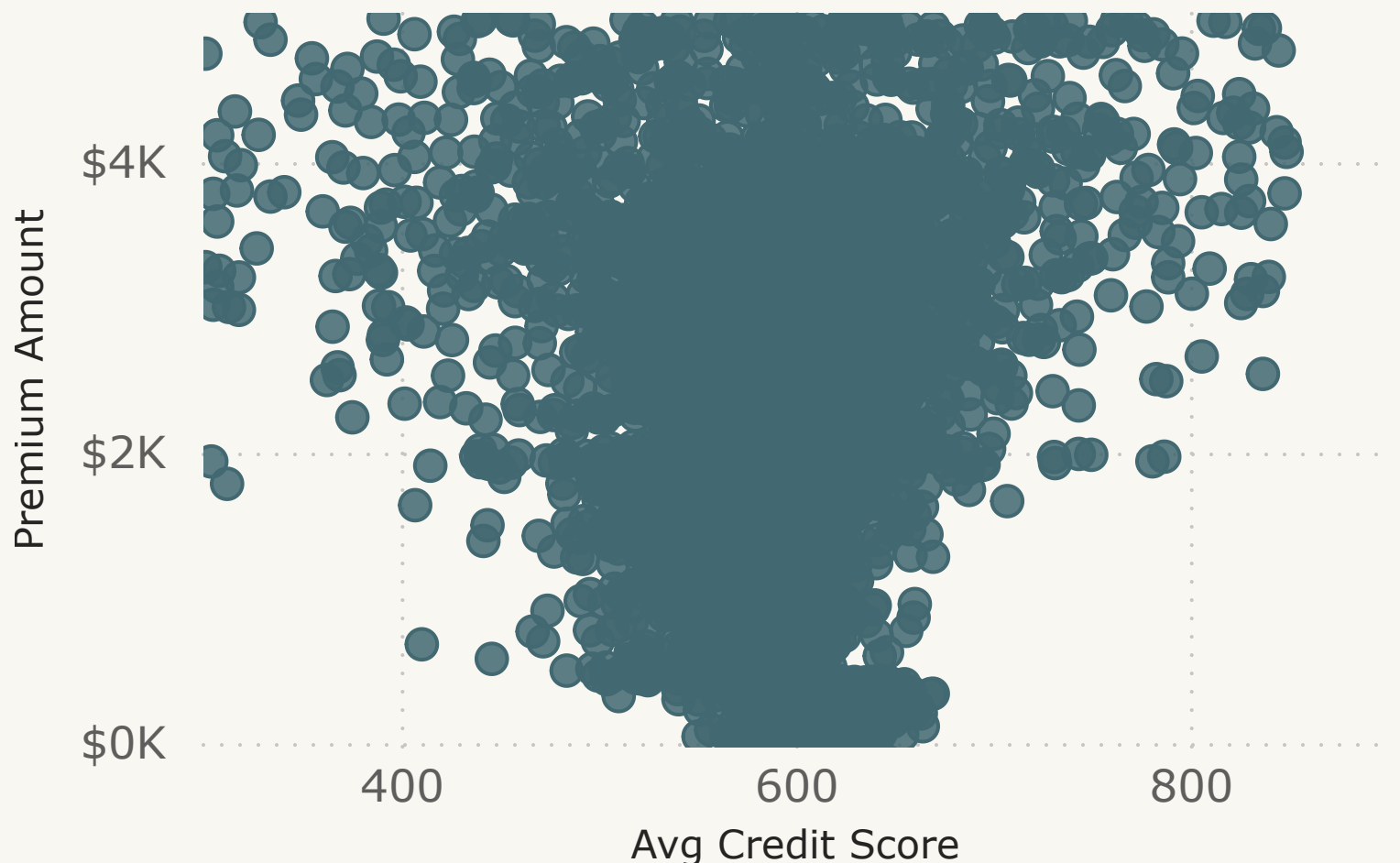
Avg Credit Score

KPI 3

Premium Amount vs. Annual Income: Policy Type Impact

Policy Type ● Basic ● Comprehensive ● Premium

Premium Amount

$54M

$53M

1560M   1580M   1600M

Annual Income
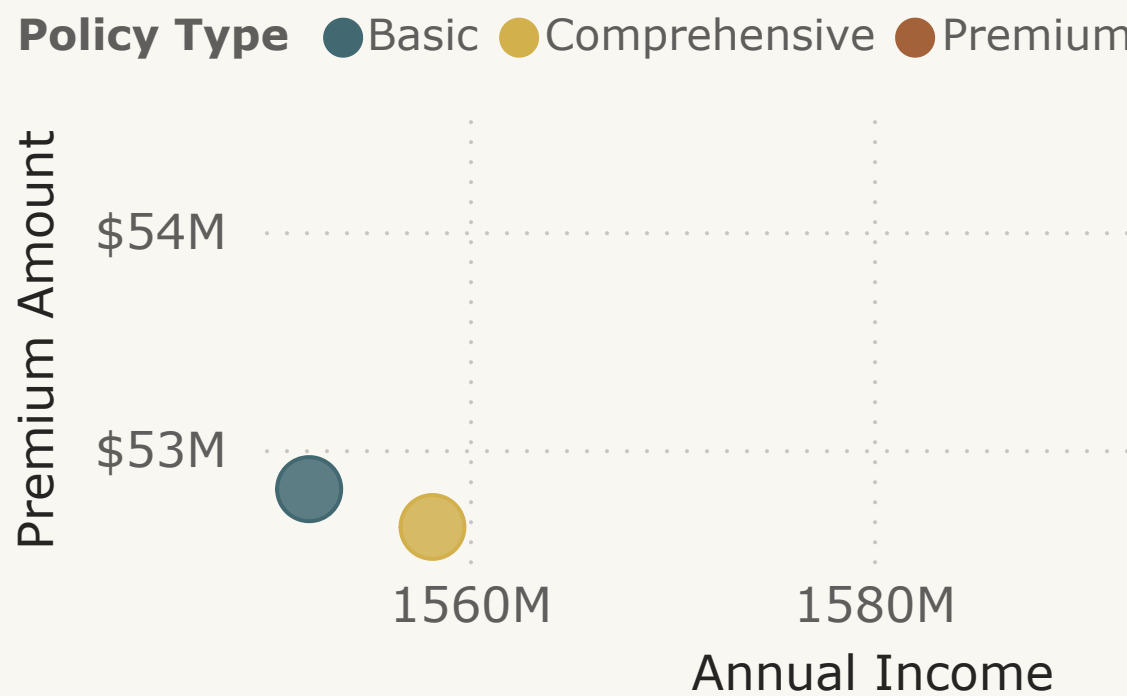
Avg Credit Score	Premium-to-Income Ratio
591	3%

Marital Status Breakdown

Single — 50K
Married — 48K
Divorced — 47K

0K   20K   40K
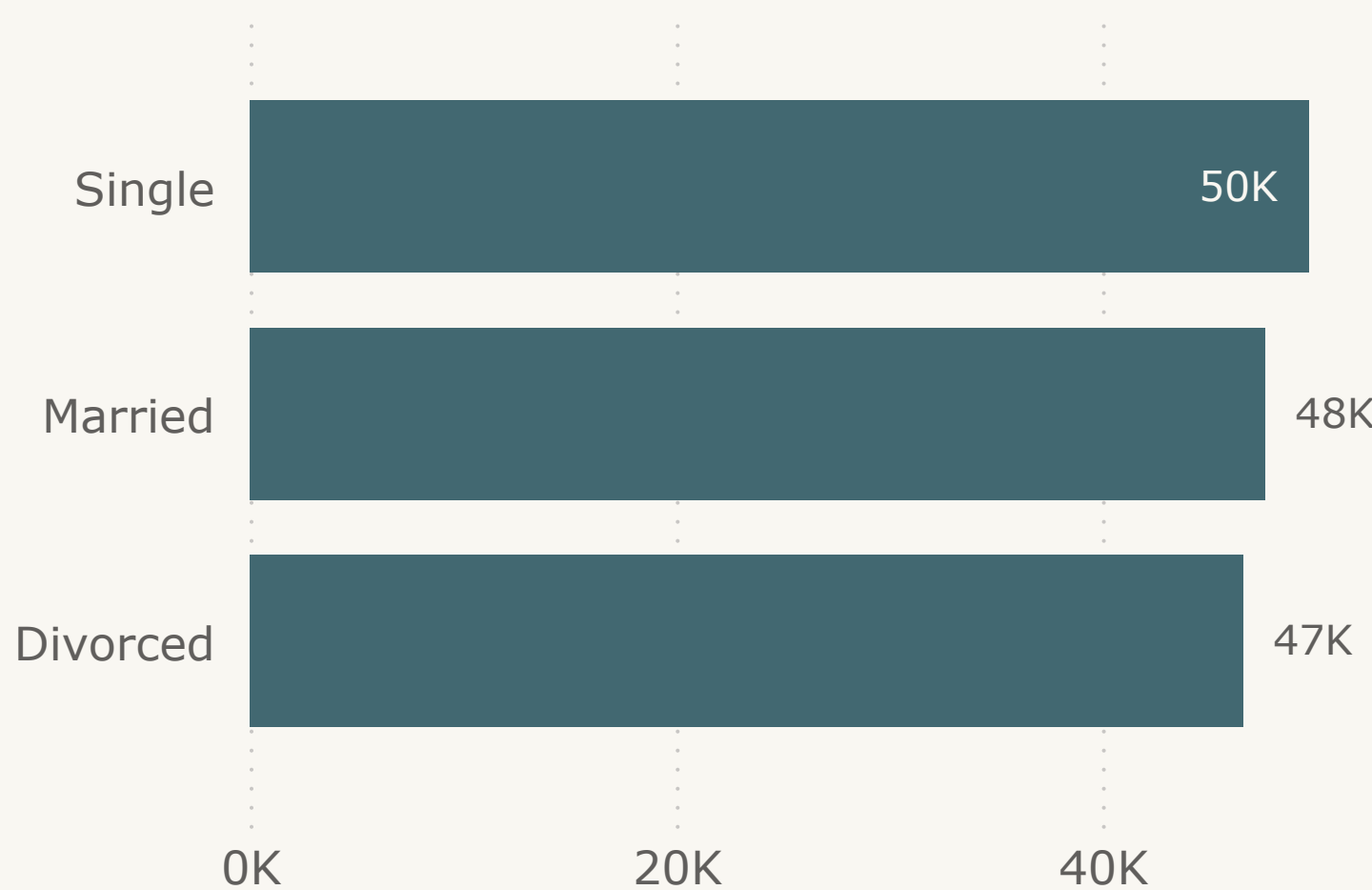
Insurance Insights & Trends Dashboard

Area
All ⌄

Months
All ⌄

Year
All ⌄

KPI 4

How Fitness Habits Shape Your Health

Chart axis left: 30, 20, 10, 0
Chart axis right: 25.60, 25.55, 25.50
Categories: Daily, Rarely, Weekly, Monthly
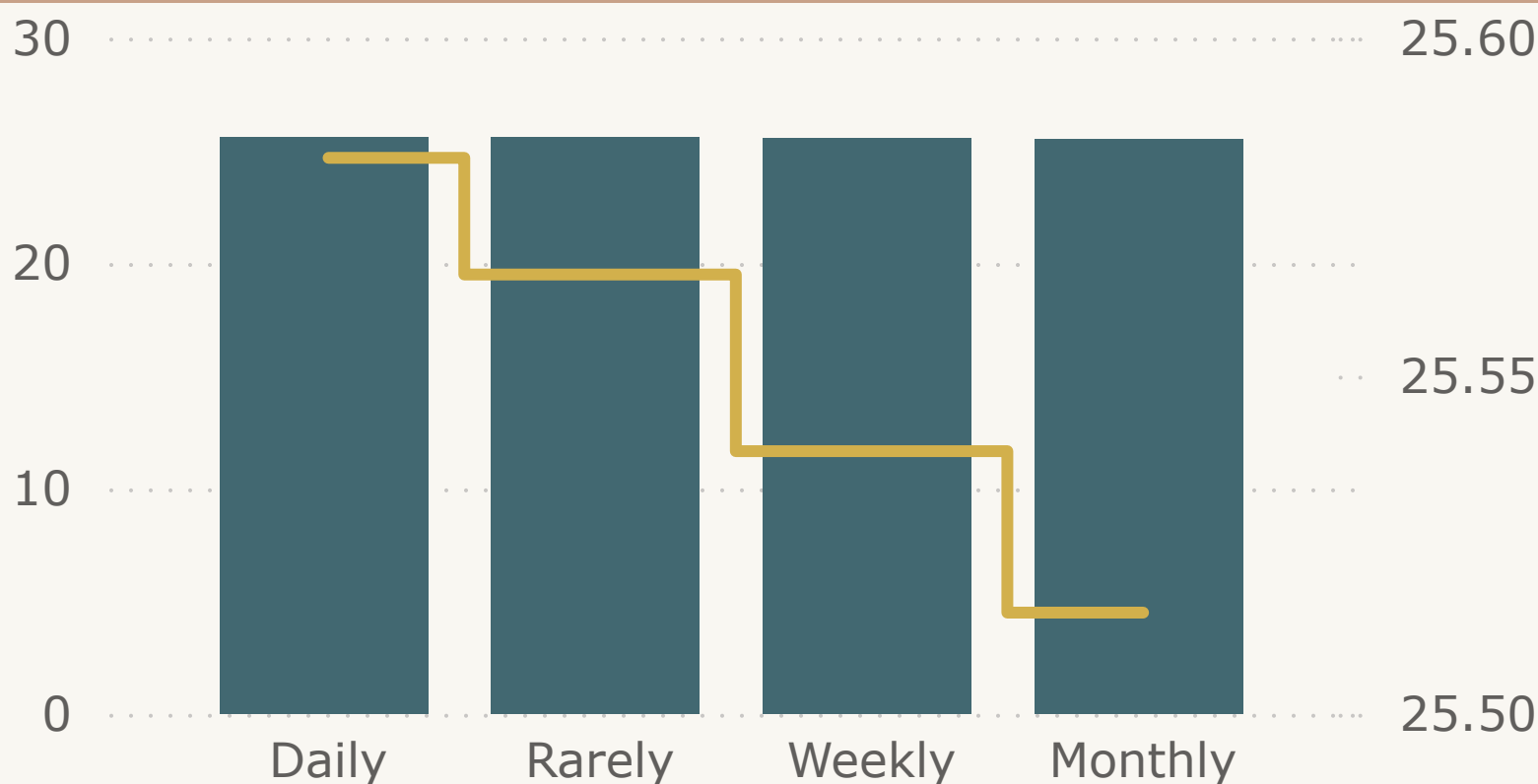
Avg Health Score	Avg Age
26	41

Trend of Active Customers by Year and Age Group

Age Group ● Adult ● Senior ● Young

2020: 106K, 77K, 59K; 37K, 27K
2022: 107K, 78K, 60K; 107K, 78K, 60K
2024: 104K, 76K, 59K; 63K, 45K, 36K
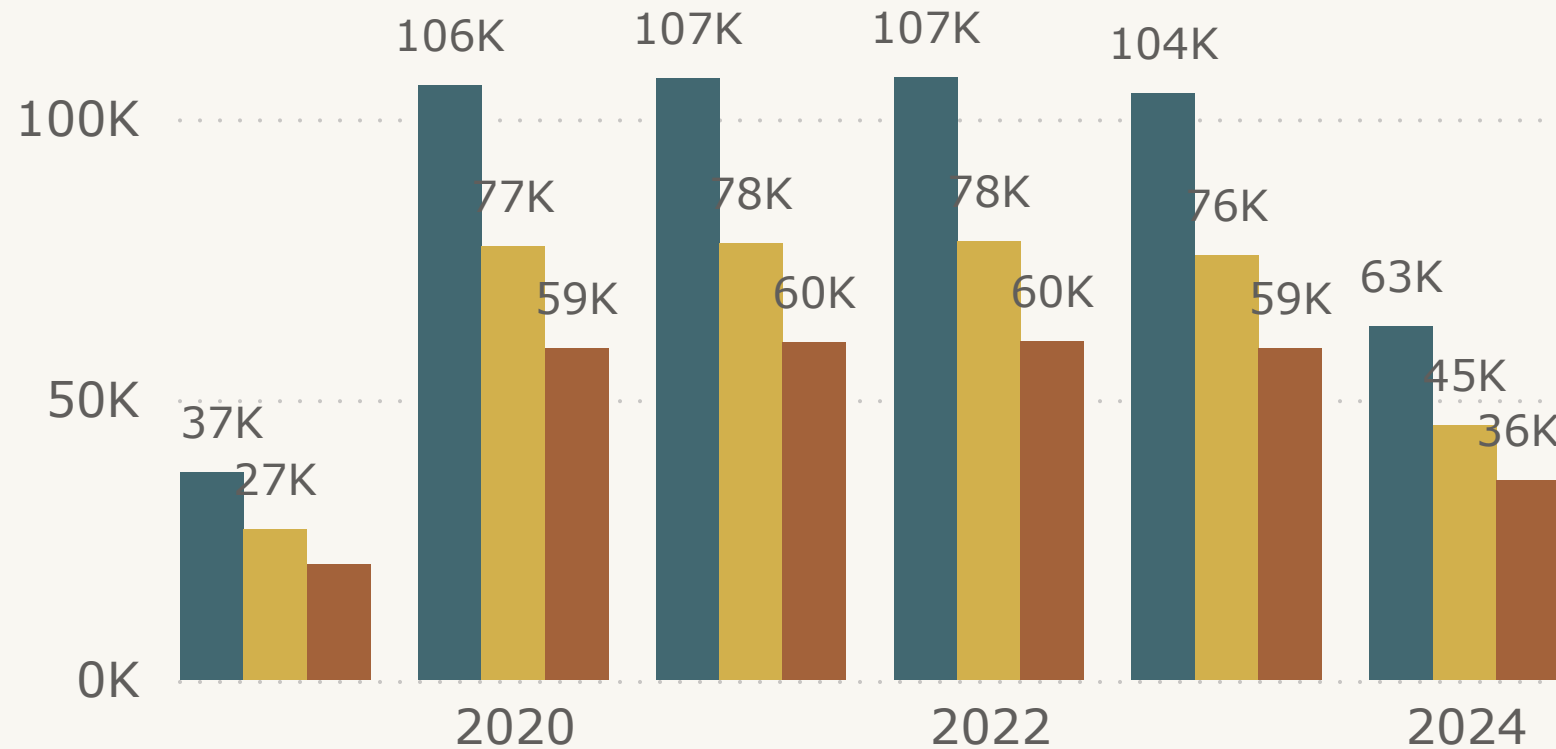
KPI 5

Gender Distribution

● Male ● Female

49.8... 5...
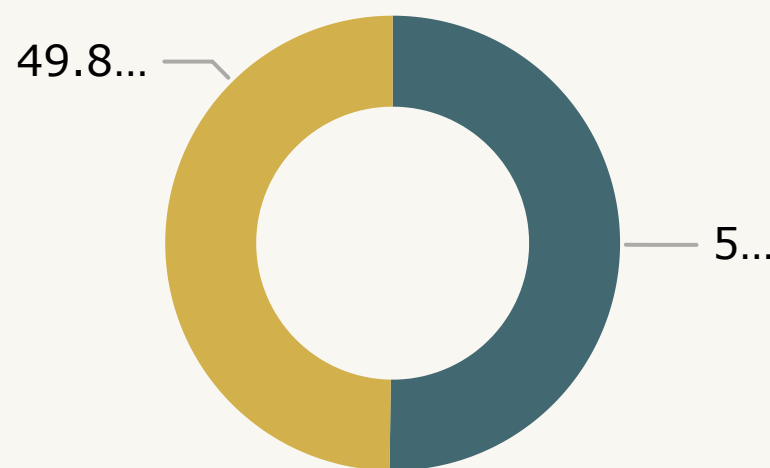
Premium Amount by Gender

● Male ● Female

$65... $66...
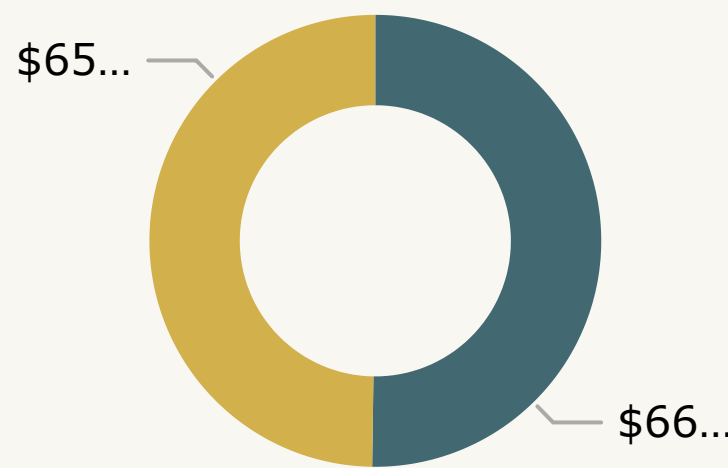
Total Males	Total Females
603K	597K

Premium Trends Over Time by Customer Feedback

Customer Feed... ● Average ● Good ● Poor

$100M, $50M
Average: $101M, $102M, $103M, $101M
Good: $81M, $82M, $81M, $80M; $81M; $61M
Poor: $38M, $83M, $84M, $84M, $81M; $48M
Years: 2019, 2020, 2021, 2022, 2023, 2024
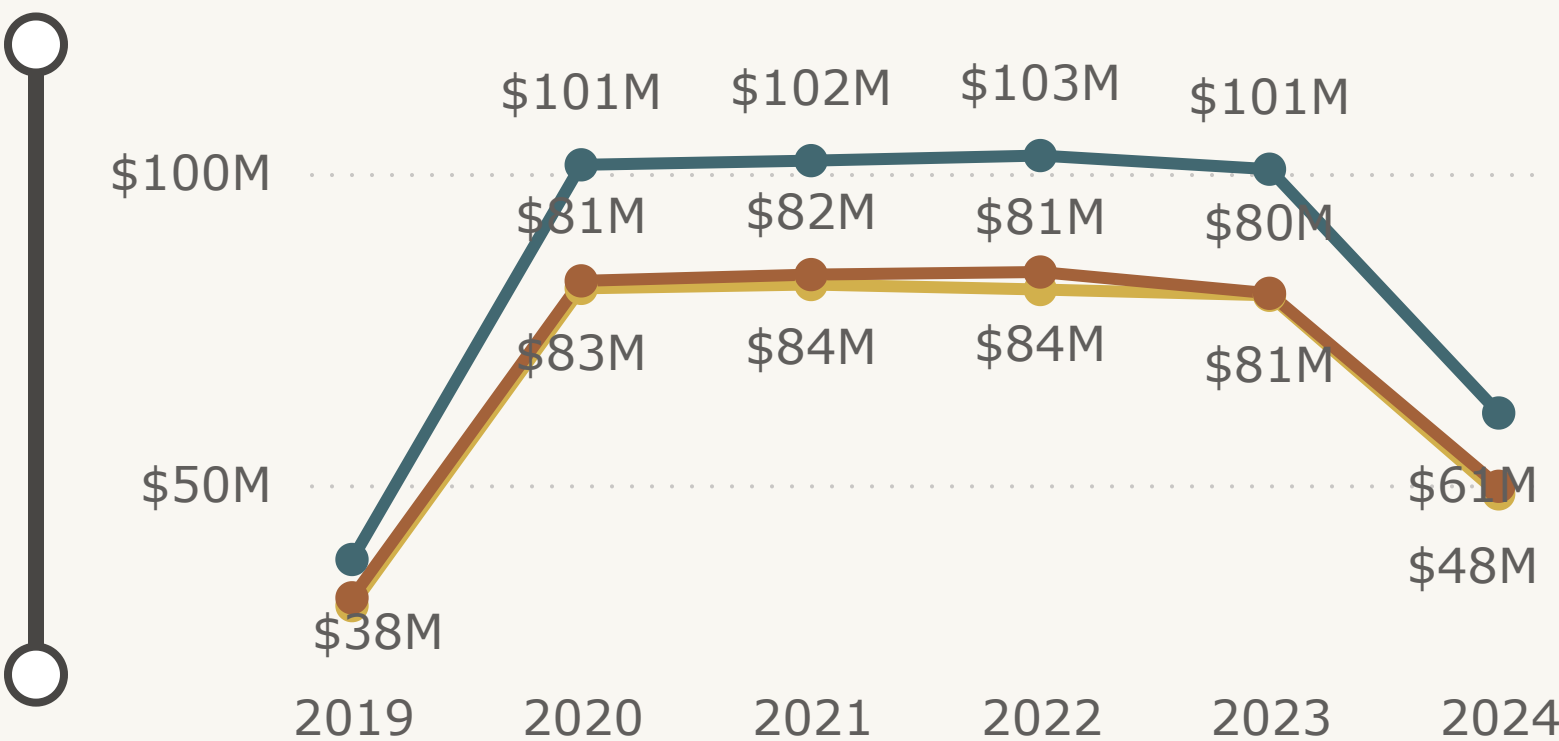
KPI 6

Insurance Claim History Across Age Group by Occupation

Age Group ● Adult ● Senior ● Young

Adult: Employed 280K, Self-Employed 124K, Unemployed 121K
Young: Employed 1..., Self-..., Une...
Senior: Employed 203K, Self-Employed 90K, Unemployed 88K
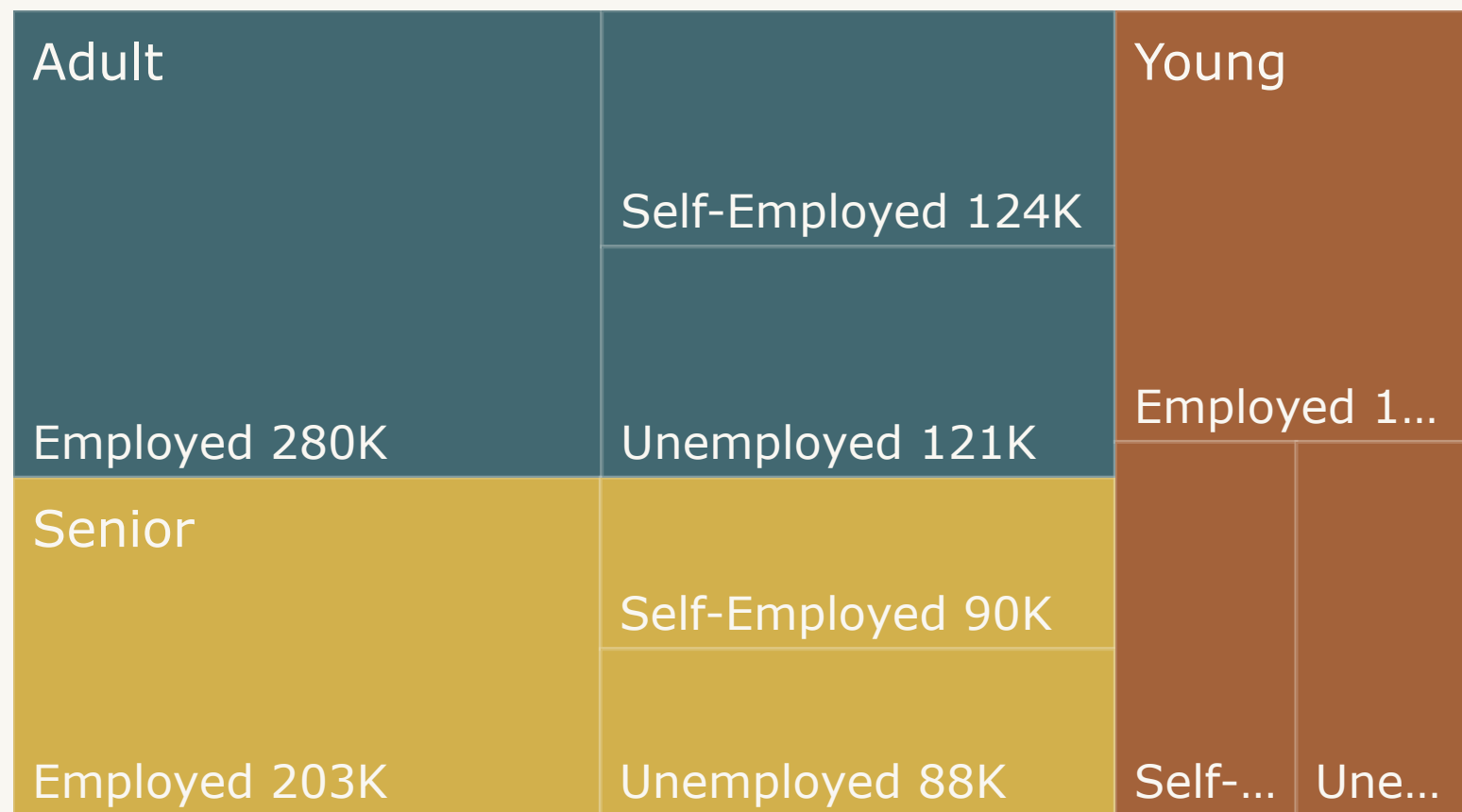
Insurance Purchase Conversion by Age Group

100%

Adult	$579M
Senior	$419M
Young	$326M

56.3%