KPMG Data Analysis

KPMG Data Analysis Report

Prepared by: [Your Name]

Date: [Current Date]

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1. Executive Summary

This report analyzes KPMG's customer and transaction datasets to derive actionable business insights. The analysis covers customer segmentation, transaction trends, new customer potential, and Customer Lifetime Value (CLV). Key findings include:

- **Mass Customer** segment dominates (50% of customers), but **High Net Worth** customers show higher bike-related purchases.
- Sales peak in **October**, with **Solex** being the top-selling brand.
- **QLD (Queensland)** and **NSW (New South Wales)** are key regions for new customer acquisition.
- **Financial Services** and **Manufacturing** industries drive higher CLV.

Recommendations focus on targeted marketing, geographic expansion, and product optimization.

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2. Methodology

- **Tools Used**: Excel (Data Cleaning, PivotTables, Formulas, Charts).
- **Data Sources**:
  - Customer Address
  - Customer Demographics
  - Transactions
  - New Customer List
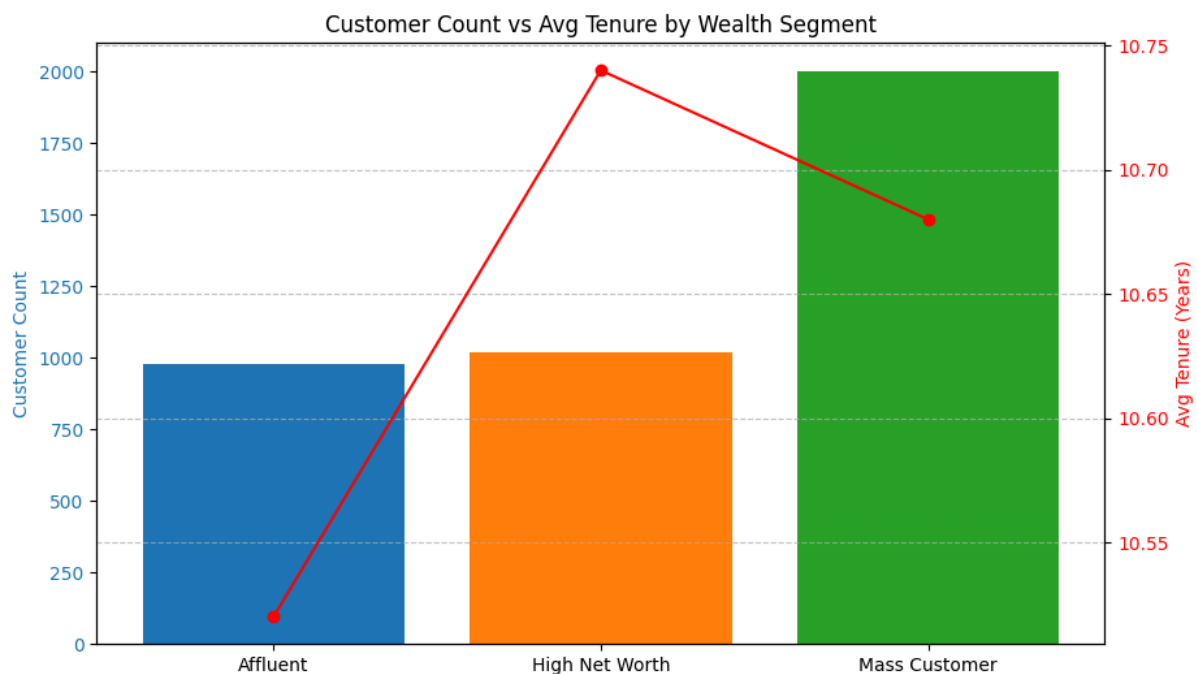- **Key Metrics**: CLV, Sales Trends, Customer Segmentation.

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3. Key Findings

3.1 Customer Segmentation

Wealth Segments

Segment	Customer Count	Avg. Tenure (Years)	Avg. Past 3-Yr Purchases
Affluent	979	10.52	48.2
High Net Worth	1,021	10.74	49.9
Mass Customer	2,000	10.68	42.3

Insight: High Net Worth customers have the highest purchase frequency.

Gender Distribution

- **Female**: 2,039 (51%)

- **Male**: 1,873 (47%)

- **Unknown**: 88 (2%)

Insight: Males spend slightly more on bikes (Avg. $49.9 vs. $48.2 for females).

Job Industry

Top 3 Industries:

1. **Manufacturing** (799 customers)
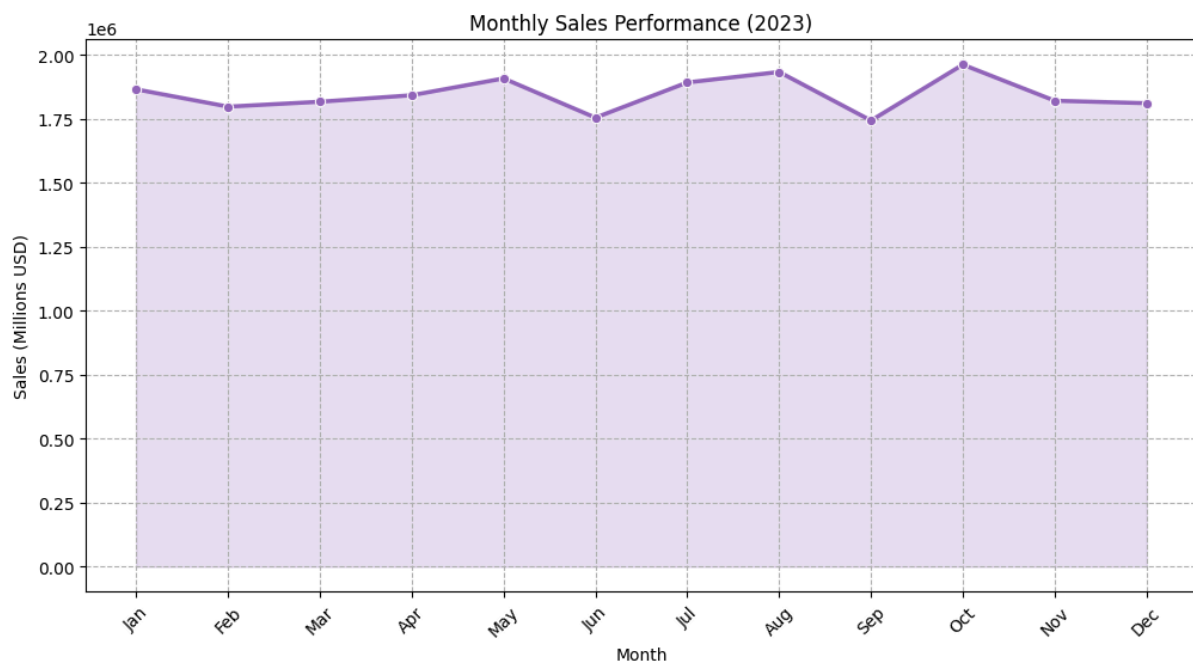
2. **Financial Services** (774)

3. **Health** (602)

Recommended Chart:

- **Bar chart** showing customer count by industry.

3.2 Transaction Analysis

Sales Trends (Monthly)

- **Peak Month**: October ($1.96M)

- **Lowest Month**: June ($1.76M)
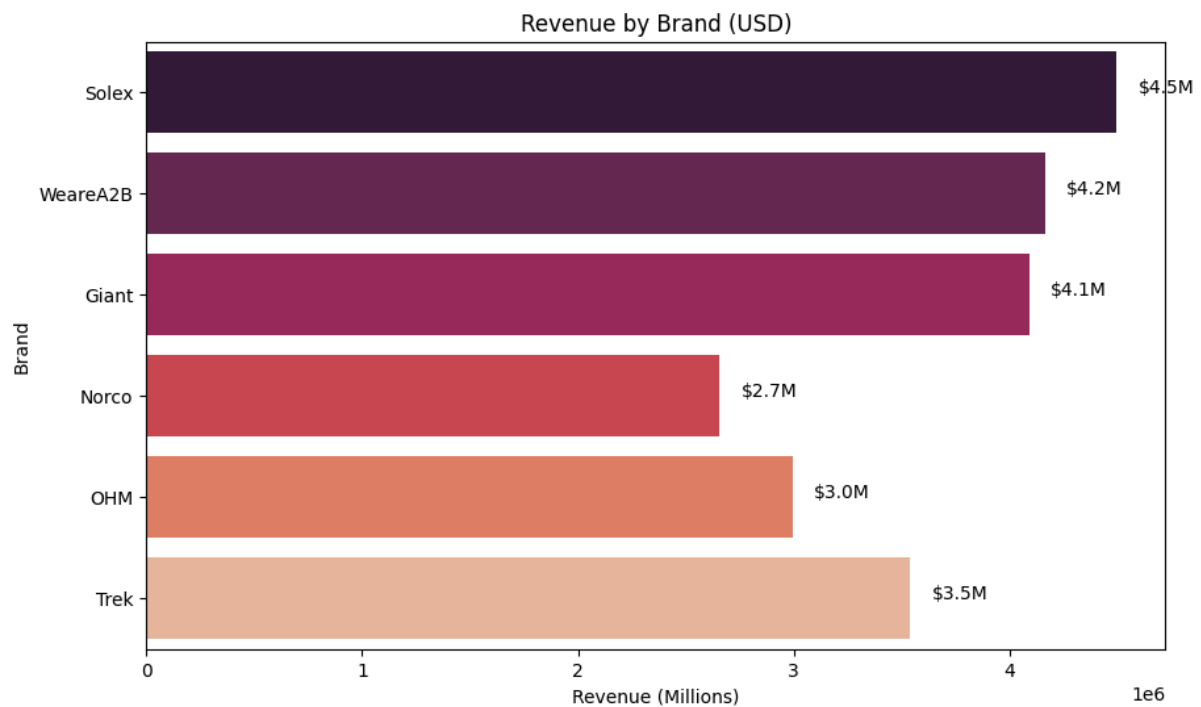

- **Line graph** of monthly sales trends.

Top Brands by Revenue

Brand	Revenue (USD)
Solex	4.49M
WeareA2B	4.16M
Giant Bicycles	4.09M

Insight: Solex contributes 20.5% of total revenue.

Revenue by Brand (USD)

Top 10 Customers

Customer Name	Total Spend (USD)
Jillie Fyndon	19,071
Hercule	18,349
Jeffry Slowly	18,053

Recommended Chart:
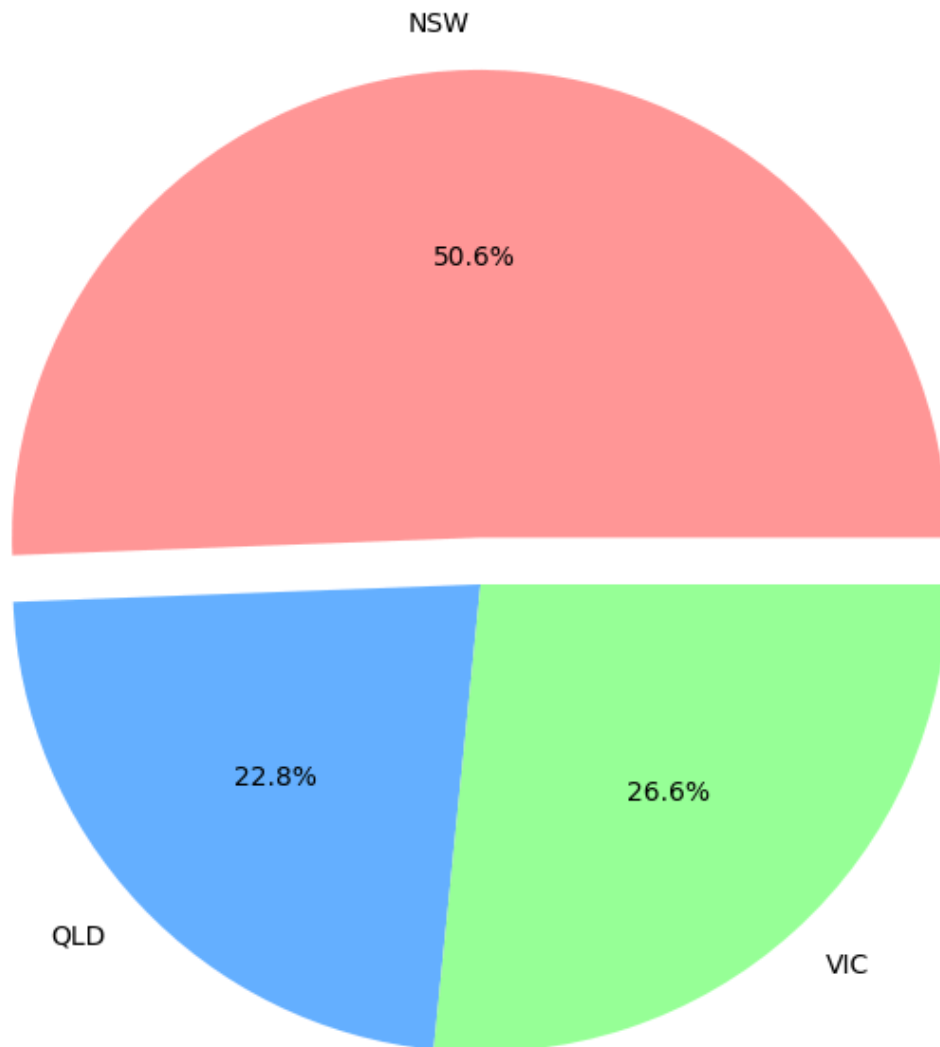
- **Horizontal bar chart** of top 10 customers.

3.3 New Customer Insights

Geographic Distribution

- **NSW**: 506 customers
- **VIC**: 266
- **QLD**: 228

Opportunity: Focus marketing efforts in **NSW** and **QLD**.

New Customer Geographic Distribution

Potential Revenue

- **Total**: $43,980 (Avg. $44 per customer).

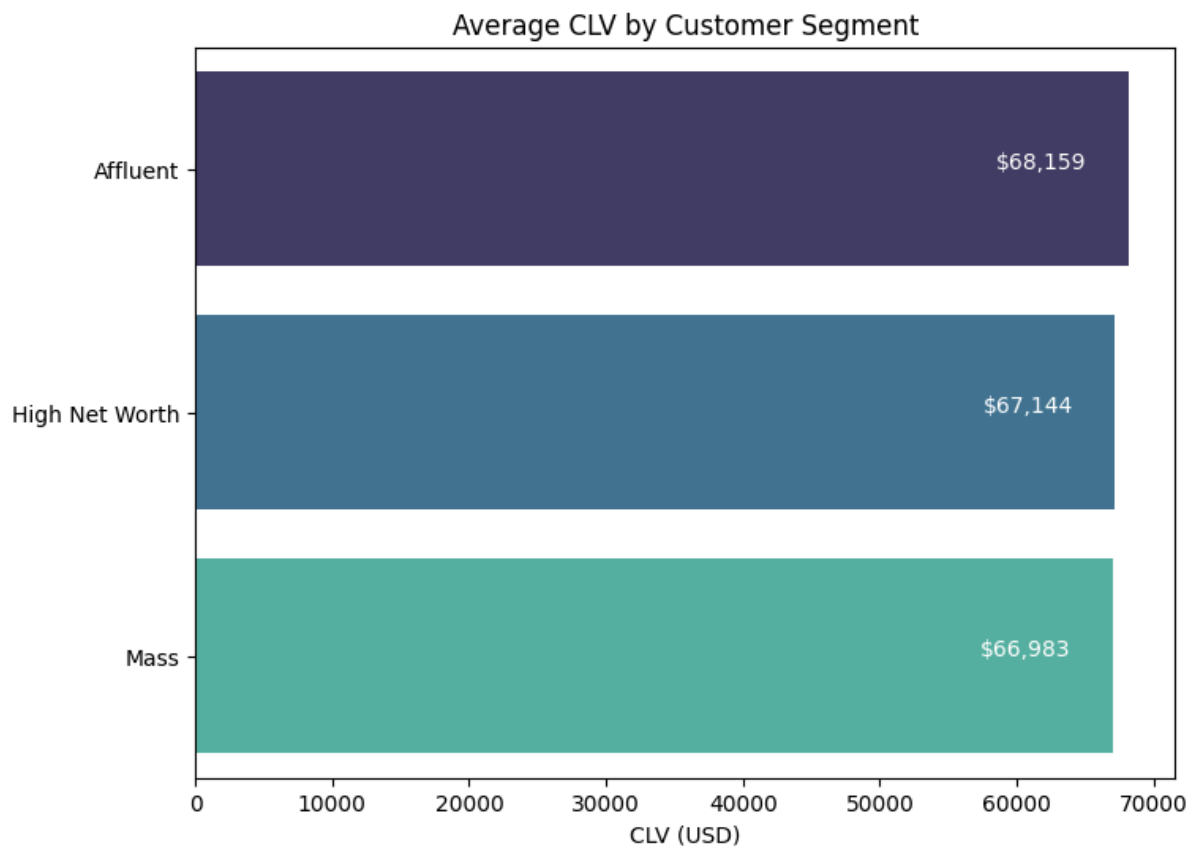---

3.4 Customer Lifetime Value (CLV)

Segment	Avg. CLV (USD)
Affluent	68,159
High Net Worth	67,144
Mass Customer	66,983

Drivers of High CLV:

- Longer tenure

- Higher past purchases

- Employment in **Financial Services/Manufacturing**.

Chart:

Average CLV by Customer Segment

- **Clustered column chart** of CLV by wealth segment.

4. Recommendations

4.1 Marketing Strategies

- **Target High Net Worth** customers with premium bundles (e.g., "Elite Cycling Packages").

- **Personalized discounts** for frequent buyers (e.g., 10% off after 5 purchases).

- **Gender-specific campaigns**: Highlight high-performance bikes for male customers.

4.2 Business Expansion

- **Prioritize NSW and QLD** for new store openings.

- **Partner with local gyms** in **VIC** to cross-sell fitness bikes.
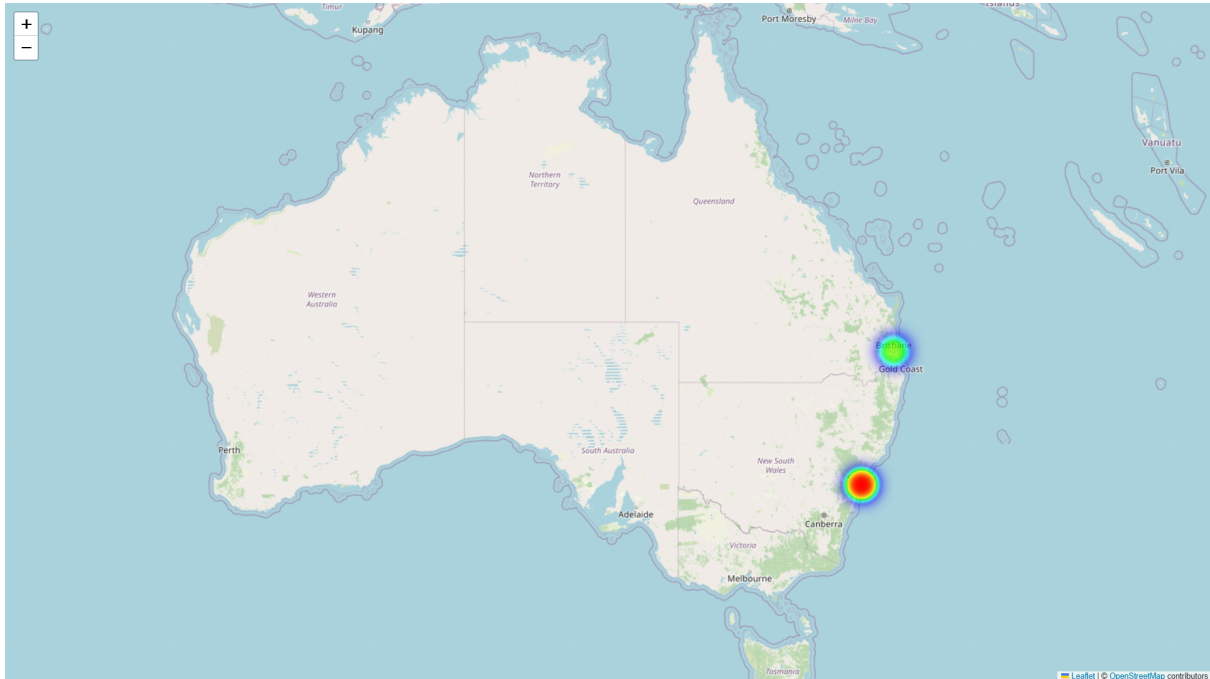
4.3 Product Improvements

- **Discontinue low-performing brands** (e.g., analyze brands beyond top 3).

- **Introduce seasonal offers** (e.g., "Summer Road Bike Discounts").

- **Enhance warranties** for high-value bikes to build trust.

5. Conclusion

This analysis highlights opportunities to optimize marketing, expand geographically, and refine product offerings. By focusing on high-CLV segments and seasonal trends, KPMG can drive revenue growth and customer retention.

Next Steps:

1. Implement A/B testing for personalized offers.

2. Track post-campaign sales performance.

Appendix:

- *All charts mentioned above should be inserted here with clear labels*.

- *Data cleaning steps documented in Excel*.

End of Report

Notes for Your Portfolio

1. **Visuals to Include**:

   - *Wealth segment pie chart*.

   - *Monthly sales trend line graph*.

   - *CLV by industry heatmap (if data allows)*.

2. **Highlight Skills**:

   - Data cleaning in Excel.

   - PivotTables for segmentation.

   - CLV formula implementation.

Let me know if you'd like to refine any section further!