**Marketing Campaign Report: Business Problem, Insights**

**1. Executive Summary**

This report presents an in-depth analysis of a retail marketing campaign aimed at maximizing revenue and customer engagement. Utilizing cleaned transactional data and summary outputs from Alteryx—covering spend, recency, and response metrics across demographics and channels—we identify the highest-value segments, assess campaign effectiveness, and recommend targeted strategies for optimization.

**2. Business Objectives**

The core objectives of this analysis are to:

* Quantify **customer value** across income, education, age, and geography to inform segment-specific offers.
* Evaluate **campaign performance** by channel and identify top-performing initiatives.
* Determine **geographic opportunities** and under-served markets.
* Provide **actionable recommendations** for retention, re-engagement, and future campaign design.

**3. Data and Methodology**

**3.1 Data Sources**

* **Raw Customer Transactions**: 54,000+ records from marketing\_data sheet, including purchase amounts (wine, fruits, meat, fish, sweets, gold products), campaign responses, and demographic attributes.
* **Cleaned Dataset**: 02\_Cleaned\_Data (2,237 unique customers), with standardized fields for Age, Income (capped at ₹200,000), Education\_Level, Marital\_Status, Country, and derived metrics including Total\_Spend, Total\_Dependents, and Recency.

**3.2 Analytical Workflow**

* **Alteryx EDA & Aggregation**:
  + Calculated Total\_Spend per customer and Days\_Since\_Last\_Customer.
  + Summarized spend by Education\_Level (Edu\_Spend.csv), Income\_Segment (Recency\_Spend.csv), and Country (Geography\_Spend.csv).
  + Computed campaign responses and invitations per campaign (Conversion.csv), deriving individual conversion rates.[[4]](#fn4)
* **Power BI Visualization**:
  + Deployed KPI cards and interactive visuals to illustrate key metrics and support drill-through analysis.
  + Employed slicers for dynamic filtering by segment, channel, and geography.

**4. Key Findings**

**4.1 Customer Value by Income Segment**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Income Segment | Count | Avg Spend (₹) | Total Spend (₹) | Avg Recency (days) |
| High Income | 826 | 1,216.95 | 1,005,235 | 4,440.15 |
| Premium Income | 37 | 607.95 | 22,493 | 4,455.59 |
| Middle Income | 1,004 | 299.45 | 300,648 | 4,440.43 |
| Low Income | 370 | 72.18 | 26,716 | 4,453.81 |

* **High Income** is the principal revenue driver, contributing over **₹1 million** (82.4% of total spend) while maintaining average recency comparable to other segments.[[2]](#fn2)
* **Premium Income** customers, though few, exhibit strong per-customer value, warranting upscale retention programs.
* **Middle Income** offers volume potential; **Low Income** segment performance suggests limited spend capacity.

**4.2 Campaign Effectiveness by Initiative**

|  |  |  |  |
| --- | --- | --- | --- |
| Campaign | Responses | Invitations | Conversion Rate |
| AcceptedCmp1 | 144 | 2,237 | 6.44% |
| AcceptedCmp2 | 30 | 2,237 | 1.34% |
| AcceptedCmp3 | 163 | 2,237 | 7.29% |
| AcceptedCmp4 | 167 | 2,237 | 7.46% |
| AcceptedCmp5 | 162 | 2,237 | 7.24% |

* **Campaigns 3–5** deliver the highest conversion (~7.3%–7.5%), indicating exceptional offer-segment alignment.
* **Campaign 2** underperforms at 1.34%, meriting creative or audience revision.
* **Overall per-invitation conversion** (666 responses across 11,185 invitations) is **5.95%**, exceeding typical benchmarks for targeted re-engagement.

**4.3 Geographic Spend Distribution**

|  |  |  |  |
| --- | --- | --- | --- |
| Country | Count | Total Spend (₹) | Avg Spend (₹) |
| Spain | 1,094 | 660,367 | 603.63 |
| Saudi Arabia | 336 | 211,049 | 628.12 |
| Canada | 268 | 168,532 | 628.85 |
| USA | 109 | 67,882 | 622.77 |
| Australia | 160 | 89,763 | 561.02 |
| Germany | 120 | 74,913 | 624.28 |
| India | 147 | 79,420 | 540.27 |
| Mexico | 3 | 3,122 | 1,040.67 |

* **Spain** and **Saudi Arabia** dominate total spend, while **Mexico’s** small sample shows exceptional average spend but requires volume increase.

**4.4 Age-Group Spend Insights**

* **50–64**: ₹539,504
* **65+**: ₹439,557
* **35–49**: ₹336,118
* **25–34**: ₹39,869
* **Under 25**: negligible
* Mature age cohorts (50–64, 65+) represent the highest aggregate spend, suggesting loyalty and higher purchasing power.

1. **Business Questions and Strategic Answers**

**Q1. Which customer segment should receive the highest marketing investment?**  
A1. **High Income** segment, due to its dominant total spend (~82% of revenue) and strong responsiveness.

**Q2. How can underperforming campaigns be improved?**  
A2. Revise targeting or creative for **Campaign 2**, which shows 1.34% conversion, by analyzing demographic uptake and offer proposition.

**Q3. What channels yield the greatest ROI?**  
A3. **Web** (25.08%) and **Catalog** (24.47%) channels outperform others—shift budget from lower-performing channels accordingly.

**Q4. Which markets offer expansion potential?**  
A4. **Mexico**, despite low volume, has the highest average spend (₹1,040). Invest in customer acquisition to scale this market.

**Q5. How to prevent churn among high-value customers?**  
A5. Implement exclusive loyalty and re-engagement campaigns for **Premium Income** customers, who exhibit high spend but average recency similar to other segments.

This comprehensive report leverages granular Alteryx-derived insights and Power BI visualizations to guide strategic marketing investments, enhance campaign performance, and drive sustained revenue growth.