BANK MARKETING CAMPAIGN ANALYSIS PRESENTATION

PRESENTATION BY:

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Project Overview

The project is to analyze a Portuguese banking institution dataset on direct marketing campaign to uncover insights that drives more strategic marketing to increase the bank's bottomline.

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Project Objectives

1 Carry out Exploratory Data Analysis to uncover key trends in order to: **Increase Term deposit subscriptions**
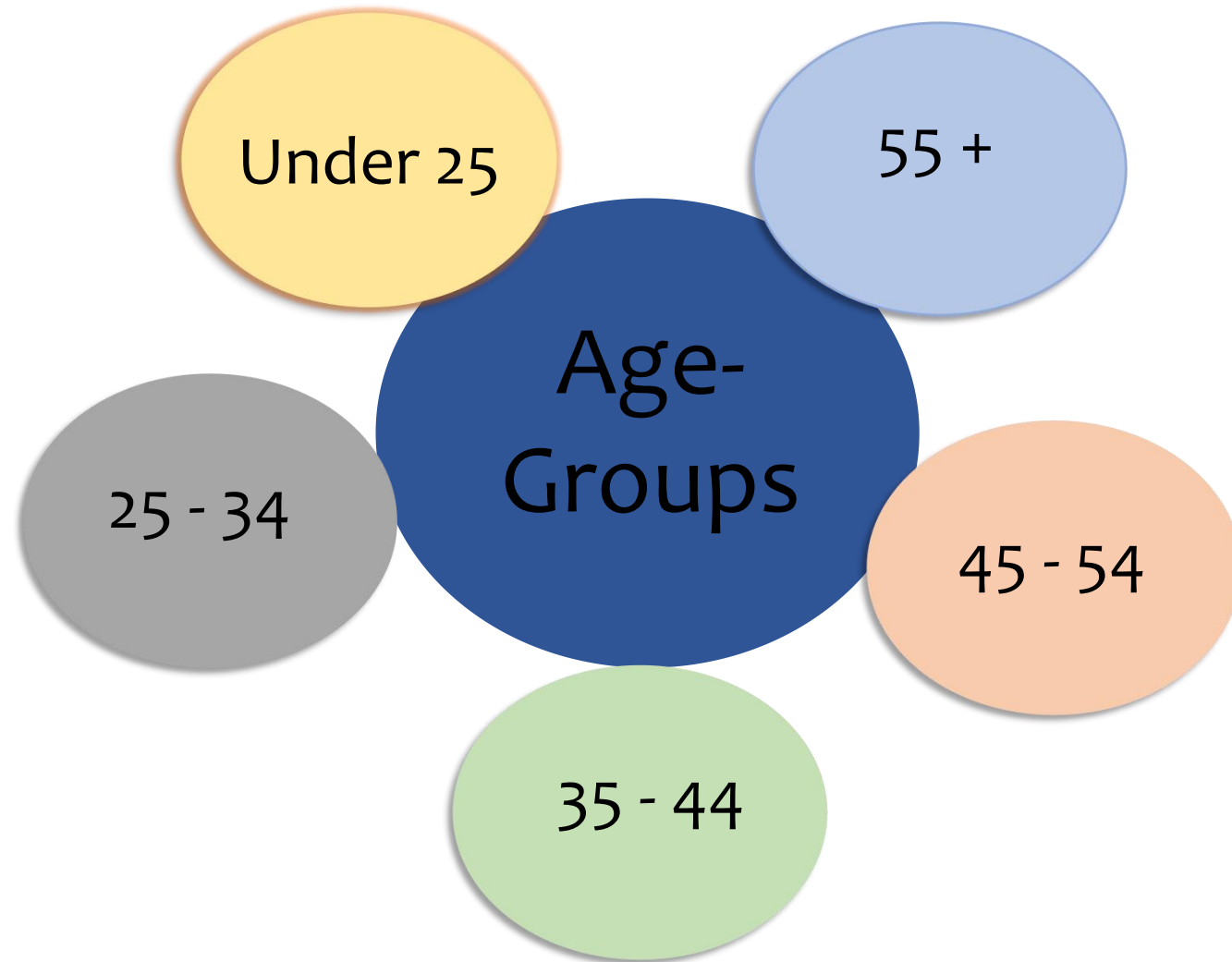
2 **Identify key Customer segments**

3 **Optimize future campaign strategies**

Customer Age Grouping

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KEY FINDINGS

S/N	METRICS	FINDINGS
1	**Total number of campaigns**	Overall, 4, 521, out of which a whooping 4000 were unsuccsessful, while 521 were successful campaigns resulting to subscriptions by the customers.
2	**Contact**	Findings reveal that 2,896(64%) were contacted through cellular, which could have been a more preferred medium of contact for majority.
3	**Monthly Trends**	Campaigns were most successful in the month of October, followed by December, while, the months of May, July and November recorded poor campaign outcomes.
4	**Trends across Age group**	Under 25 had the highest subscription rates, following closely was 55+ age group. However, ages 35-44 and 45-54 had the least subscription rates.
5	**Marital**	Singles subcribed more than all other sub-groups.
6	**Education Category**	Customers in the Tertiary level subscribed most.
7	**Job Status**	While the Retired and Students recorded the highest subscription rates, those of Blue-collar, Services and Entrepreneur were the least subscribed.
8	**Account Balances**	Customers with higher account balances subscribed the most.

In Conclusion

Sequel to the result of our findings, the bank's marketing campaign yielded low subscription rates across most customer segments and demographics, indicating a lack of alignment between the marketing strategy and customer preferences.

Though it targeted a broad base, the approach did not effectively engage or convert customers. Key contributing factors may include inadequate customer segmentation, inability to contact most of the customers, generic messaging, poor timing, and an over-reliance on cold calls as the primary outreach channel. These findings suggest a critical need to refine the bank's marketing approach using data-driven strategies tailored to specific customer behaviors and needs.

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Recommendations

▲ **Implement Data-Driven Customer Segmentation**

▲ **Personalize Campaign Messaging**

▲ **Diversify Marketing Channels**

▲ **Enhance Agent Training and Call Scripts**

▲ **Gather Feedback from Non-Subscribers**