

TRAVEL ANALYTICS DASHBOARD

Executive Summary & Strategic Analysis

Executive Overview

This report summarizes the exploratory data analysis (EDA) and visualizations conducted Travel Analytics project. The dataset contains 4,128 customer records spanning 20 variables including demographics, income, travel preferences, and product purchase outcomes. Nine strategic business questions were analyzed through Excel pivot tables and visualized in Tableau. The overall product conversion rate — the share of customers who purchased a travel package after being pitched — is 19.3% (797 out of 4,128 customers).

Key Metrics at a Glance

Metric	Value	Insight
Total Customers	4,128	Full dataset, no filtering applied
Overall Conversion Rate	19.3%	797 customers purchased
Largest Age Segment	30–39 (44.6%)	1,840 customers — dominant cohort
Highest Converting Age Group	10–19 (69.0%)	29 of 42 customers purchased
Best Income Bracket (Conversion)	11,000–20,999 (26.3%)	323 of 1,230 purchased
Highest Pitch Satisfaction	Large Business (avg 3.24)	42.5% scored 4 or 5
Company Invited Conversion	22.7%	vs 17.9% for Self Enquiry
City Tier 2 Conversion	26.5%	43 of 162 customers — highest rate
Best High-Star Product	Basic (37.5%)	238 of 635 high-star customers purchased

Q1: Age Distribution of Customers

Chart Analysis

The age distribution pivot table (Count of Gender by Age Group) reveals a right-skewed distribution with the vast majority of customers falling in the working-age range. Males outnumber females in every age group except 60–69, where the split is nearly even (19F vs 17M).

Age Group	Female	Male	Total	% of Base	Male %
10–19	15	27	42	1.0%	64.3%
20–29	299	488	787	19.1%	62.0%
30–39	747	1,093	1,840	44.6%	59.4%
40–49	381	569	950	23.0%	59.9%
50–59	204	269	473	11.5%	56.9%
60–69	19	17	36	0.9%	47.2%
Total	1,665	2,463	4,128	100%	59.7%

Key Insights

- The 30–39 age group is by far the largest segment at 44.6% of all customers (1,840 records), followed by 40–49 at 23.0% and 20–29 at 19.1%. These three groups together account for 86.7% of the entire customer base.
- Male customers make up 59.7% of the total dataset — a consistent majority across all age groups except 60–69, where females are slightly more represented.
- The youngest (10–19) and oldest (60–69) groups are negligible in volume, together representing only 1.9% of customers.
- The gender gap narrows with age: from 64.3% male in the 10–19 group to near-parity (47.2% male) in the 60–69 group.

Recommendations

- Focus marketing resources predominantly on the 30–49 age window, which collectively represents 67.6% of the customer base (2,790 customers).
- Develop gender-segmented messaging given the overall male skew, particularly for the core 20–49 cohort where males outnumber females nearly 60:40.

Q2: Correlation Between Monthly Income and Number of Trips

Chart Analysis

The pivot table cross-tabulates customer monthly income brackets against the number of trips taken per year. The bulk of the dataset sits in the 11,000–20,999 and 21,000–30,999 income bands, with very few customers at the extremes.

Income Bracket	Customers	% of Base	Most Common Trip Count
1,000–10,999	2	0.05%	4–5 trips
11,000–20,999	1,230	29.8%	1–2 trips (dominant)
21,000–30,999	2,584	62.6%	2–3 trips (dominant)
31,000–40,999	311	7.5%	1–5 trips (spread)
91,000–100,999	1	0.02%	2 trips

Key Insights

- The 21,000–30,999 bracket dominates the dataset at 62.6% of customers (2,584 records). Customers in this range most commonly take 2–3 trips per year, with a notable cluster of 3-trip customers (768 records).
- The 11,000–20,999 bracket (29.8% of customers) skews toward fewer trips — 486 customers make 2 trips and 228 make just 1, suggesting lower travel frequency correlates with lower income.
- Higher income customers (31,000–40,999) show a more evenly spread distribution across 1–7 trips, indicating that higher income is associated with more varied and flexible travel behavior rather than simply more trips.
- The correlation between income and trips is positive but weak — income rises do not strongly or linearly predict trip frequency. The dataset confirms that most customers cluster around 2–4 trips regardless of income bracket.
- Extreme income outliers (under 10k and above 90k) have negligible sample sizes (2 and 1 records respectively) and should be treated as statistical outliers rather than meaningful segments.

Recommendations

- Since income is a weak predictor of trip count, product pitching strategies should not rely on income alone to forecast travel appetite. Supplement with variables like marital status, occupation, and passport ownership.
- The 21,000–30,999 bracket is the core market — tailor the breadth of product offerings (Basic through Deluxe) to serve this majority segment's 2–4 trips-per-year travel cadence.
- For the 31,000–40,999 segment, offer premium multi-trip packages given their more varied travel behavior.

Q3: Occupation Type and Pitch Satisfaction Scores

Chart Analysis

The pivot table counts customers by occupation and their pitch satisfaction score (1–5 scale). This allows both average score calculation and distribution analysis across occupational groups.

Occupation	Score 1	Score 2	Score 3	Score 4	Score 5	Total	Avg Score	% Scored 4–5
Free Lancer	0	0	2	0	0	2	3.00	0.0%
Large Business	60	35	124	77	85	381	3.24	42.5%
Salaried	387	232	615	340	425	1,999	3.09	38.3%
Small Business	359	233	516	350	288	1,746	2.99	36.5%
Grand Total	806	500	1,257	767	798	4,128	3.07	37.9%

Key Insights

- Large Business professionals have the highest average pitch satisfaction score at 3.24, and the largest share of high scores — 42.5% rated the pitch 4 or 5 out of 5.
- Salaried employees are the largest group (1,999 customers) and score pitches at an average of 3.09. Notably, they contribute the most 5-star ratings in absolute terms (425), suggesting a vocal enthusiastic minority within this group.
- Small Business owners have the lowest average satisfaction at 2.99, dipping just below neutral. They also show the highest concentration of 1-scores (359), indicating a meaningful proportion of this group finds pitches unsatisfactory.
- Score 3 ('Neutral') is the single most common score across all occupation types — accounting for 30.4% of all responses (1,257 out of 4,128). This signals that while pitches are not alienating customers, they are also not exciting enough to drive strong positive reactions.
- Free Lancers are too small a sample to draw conclusions from, and their uniform score of 3 is likely coincidental.

Recommendations

- Invest in enhanced pitch quality targeting Small Business owners — addressing the high proportion of 1-scores in this group could meaningfully shift overall satisfaction and, in turn, conversion rates.
- Leverage the pitch approach that resonates with Large Business professionals — identify what makes those pitches land better (tone, product offered, duration) and apply those learnings across occupation types.
- Set an internal KPI target to shift the modal pitch score from 3 to 4 across all groups. Even modest improvements in pitch quality have significant downstream conversion potential given the dataset size.

Q4: Customer Segmentation by Demographics & Travel Preferences

Chart Analysis

Q4 analysis uses multiple pivot tables to build a multi-dimensional segmentation picture. The primary dimension is Preferred Property Star (3, 4, or 5), cross-tabulated against Age Group, Occupation, Marital Status, Number of Persons Visiting, Monthly Income, and Number of Trips.

Preferred Property Star by Age Group

Age Group	3-Star	4-Star	5-Star	Total
10–19	27	11	4	42
20–29	448	173	166	787
30–39	1,151	341	348	1,840
40–49	580	172	198	950
50–59	315	89	69	473
60–69	20	0	16	36
Grand Total	2,541	786	801	4,128

Preferred Property Star by Occupation

Occupation	3-Star	4-Star	5-Star	Total
Free Lancer	2	0	0	2
Large Business	225	81	75	381
Salaried	1,270	345	384	1,999
Small Business	1,044	360	342	1,746
Grand Total	2,541	786	801	4,128

Preferred Property Star by Marital Status

Marital Status	3-Star	4-Star	5-Star	Total
Divorced	487 (61.7%)	152 (19.3%)	150 (19.0%)	789
Married	1,213 (60.9%)	508 (25.5%)	269 (13.5%)	1,990
Single	408 (61.2%)	145 (21.7%)	114 (17.1%)	667
Unmarried	433 (63.5%)	121 (17.7%)	129 (18.9%)	682 (approx)

Key Insights

- 3-star properties are preferred by approximately 61.6% of all customers (2,541), making the mid-range segment the dominant travel preference across every demographic cut — age, occupation, and marital status.

- 4-star and 5-star preferences are nearly equally split (786 and 801 respectively), together representing 38.4% of customers. This sizable premium segment warrants dedicated product strategies.
- The 30–39 age group dominates 3-star preferences (1,151 customers) but also contributes the most 5-star preference customers in absolute terms (348), reflecting the sheer size of this cohort.
- Among occupations, Small Business owners show the highest share of 4-star preference (360 out of 1,746 = 20.6%), while Salaried employees show the highest 5-star preference share (384 out of 1,999 = 19.2%).
- Married customers show a relatively lower 5-star preference rate (13.5%) compared to Divorced (19.0%) and Single (17.1%) customers, possibly reflecting budget constraints from family obligations.
- Number of persons visiting is concentrated at 3–4 travelers (2,078 + 930 = 75.7% of customers), while single-person and 5-person trips are extremely rare (28 and 3 respectively).

Recommendations

- Design three core product tiers explicitly mapped to the star preference segments: value-for-money packages for 3-star preferers, comfort-upgrade packages for 4-star, and premium experience packages for 5-star preferers.
- Target Divorced and Single customers with premium (5-star) options — they show comparatively higher premium property preferences and, as shown in Q5, higher conversion rates overall.
- Group travel packages designed for 3–4 persons should be the default product structure, given that 75.7% of customers plan to travel in groups of that size.

Q5: Segments Most Likely to Purchase After a Pitch

Chart Analysis

Q5 analysis provides conversion rates (% who purchased) broken down by two dimensions: age group and monthly income bracket. The Q5 Tables sheet contains the cleaner summary version of these findings.

Conversion by Age Group

Age Group	Did Not Purchase	Purchased	Total	Conversion Rate
10–19	13 (31.0%)	29 (69.0%)	42	69.0%
20–29	537 (68.2%)	250 (31.8%)	787	31.8%
30–39	1,544 (83.9%)	296 (16.1%)	1,840	16.1%
40–49	808 (85.1%)	142 (14.9%)	950	14.9%
50–59	394 (83.3%)	79 (16.7%)	473	16.7%
60–69	35 (97.2%)	1 (2.8%)	36	2.8%
Grand Total	3,331 (80.7%)	797 (19.3%)	4,128	19.3%

Conversion by Income Bracket

Income Bracket	Did Not Purchase	Purchased	Total	Conversion Rate
1,000–10,999	2 (100%)	0 (0%)	2	0.0%
11,000–20,999	907 (73.7%)	323 (26.3%)	1,230	26.3%
21,000–30,999	2,140 (82.8%)	444 (17.2%)	2,584	17.2%
31,000–40,999	281 (90.4%)	30 (9.6%)	311	9.6%
91,000–100,999	1 (100%)	0 (0%)	1	0.0%
Grand Total	3,331 (80.7%)	797 (19.3%)	4,128	19.3%

Key Insights

- The 10–19 age group is the highest-converting segment at 69.0% (29 out of 42), more than three times the overall conversion rate of 19.3%. Although small in volume, this group is remarkably receptive to travel pitches.
- The 20–29 group has the second-highest conversion rate at 31.8% with substantial volume (787 customers, 250 purchases) — making it the most commercially attractive age segment when balancing rate and scale.
- Conversion rates decline sharply with age after 29: 16.1% for 30–39, 14.9% for 40–49, and only 2.8% for 60–69. The 30–39 group still delivers the most absolute purchases (296) due to its size, despite a below-average rate.
- Counter-intuitively, higher income does not drive higher conversion. The 11,000–20,999 bracket converts best at 26.3%, while the wealthiest bracket captured (31,000–40,999) converts

at only 9.6%. This suggests the product's price-value equation resonates most with mid-income customers.

- The near-zero conversion at the highest income tier (91,000–100,999) is based on a single record and is not statistically meaningful.

Recommendations

- Prioritize the 20–29 age group as the primary target — it combines a strong 31.8% conversion rate with meaningful volume (787 customers). Campaign messaging should reflect aspirational, first-time or early-career travel themes.
- Do not overlook the 10–19 group. While small, its 69% conversion rate is exceptional. A student travel product or family package that gets young customers in early could build long-term loyalty.
- Reconsider the product or pitch strategy for high-income customers (31k+) — their 9.6% conversion suggests the current offering may not meet their expectations. A premium tier product review is warranted.
- The mid-income segment (11k–21k) is the conversion sweet spot. Ensure product pricing and value communication is most sharply tuned for this bracket.

Q6: Monthly Income Influence on Product Choice by Occupation

Chart Analysis

The Q6 pivot (all occupations included, unfiltered) cross-tabulates monthly income brackets against product type pitched across the full 4,128 customer base. With the slicer cleared, the grand totals now align with the complete dataset and the income-to-product relationship is considerably clearer and more granular than the previously filtered view.

Income Bracket	Basic	Deluxe	King	Standard	Super Deluxe	Total
1,000–10,999	0 (0%)	2 (100%)	0	0	0	2
11,000–20,999	924 (75.1%)	296 (24.1%)	1 (0.1%)	8 (0.7%)	1 (0.1%)	1,230
21,000–30,999	683 (26.4%)	1,119 (43.3%)	1 (0.0%)	692 (26.8%)	89 (3.4%)	2,584
31,000–40,999	7 (2.3%)	5 (1.6%)	102 (32.8%)	37 (11.9%)	160 (51.4%)	311
91,000–100,999	1 (100%)	0	0	0	0	1
Grand Total	1,615 (39.1%)	1,422 (34.4%)	104 (2.5%)	737 (17.9%)	250 (6.1%)	4,128

Key Insights

- The income-to-product tiering is sharp and unmistakable. Basic dominates the 11k–20k bracket overwhelmingly (924 pitches, 75.1%), while Super Deluxe takes over at 31k–40k (160 pitches, 51.4%) and King claims a further 32.8% of that bracket. Premium products are correctly concentrated at higher income levels.
- The 21,000–30,999 bracket — the largest segment at 62.6% of all customers — has the richest product mix. Deluxe leads at 43.3% (1,119 pitches), followed closely by Standard at 26.8% (692) and Basic at 26.4% (683). This mid-income range is where product selection is most actively differentiated across the sales team.
- King packages are virtually absent below 31k income (just 2 pitches across all lower brackets), and Super Deluxe barely registers below 21k (1 pitch). This confirms that the sales team correctly reserves premium products for higher earners.
- Standard remains severely under-pitched in the 11k–20k bracket — only 8 pitches out of 1,230 customers (0.7%). Since Standard is positioned just above Basic, customers approaching the top of this income band are likely being under-served by defaulting to Basic.
- Overall, Basic (39.1%) and Deluxe (34.4%) account for nearly three-quarters of all pitches across the dataset. King (2.5%) and Super Deluxe (6.1%) are niche products in terms of volume, reflecting their correct positioning for a narrow high-income segment.

Recommendations

- Expand Standard pitching within the 11k–20k bracket — with 1,230 customers and only 8 Standard pitches currently, there is an untapped upsell opportunity. Customers earning 18k–20k in particular are strong candidates for a Standard pitch over Basic.
- Review the 683 Basic pitches within the 21k–30k bracket. Many of these customers earn enough to consider Deluxe or Standard; a partial migration of Basic pitches to Standard in this bracket could lift revenue per sale meaningfully.
- Super Deluxe is now the dominant product in the 31k–40k bracket (51.4%). Given that Q5 shows this income band converts at only 9.6% overall, it is critical to understand whether the Super Deluxe product specifically is driving the low conversion or whether there are other income-bracket dynamics at play. A conversion breakdown by product within this bracket would clarify this.
- Consider developing a mid-premium bridge product between Standard and Super Deluxe for the upper end of the 21k–30k segment (the 89 Super Deluxe pitches there suggest some appetite for premium but the full jump may be too large for most in this band).

Q7: Contact Type and Conversion Rate

Chart Analysis

Your Q7 pivot directly computes the conversion rate (as a proportion) for each contact type. This is presented as a clean two-row summary showing the percentage of customers who did and did not purchase by contact origin.

Contact Type	Did Not Purchase	Purchased	Conversion Rate
Company Invited	77.3%	22.7%	22.7%
Self Enquiry	82.1%	17.9%	17.9%
Overall	80.7%	19.3%	19.3%

Key Insights

- Company Invited customers convert at 22.7%, outperforming Self Enquiry customers (17.9%) by 4.8 percentage points — a 26.8% relative improvement in conversion rate.
- This finding is notable because Self Enquiry customers are self-selected — they reached out to the company independently, which might suggest stronger purchase intent. Yet Company Invited customers convert better, pointing to the effectiveness of the company's proactive targeting and outreach strategy.
- Self Enquiry represents the larger channel (2,918 customers, 70.7% of total), meaning even a small improvement in Self Enquiry conversion would deliver more absolute purchases than large improvements in the Company Invited channel.
- The 4.8 percentage point gap is practically significant: if Self Enquiry conversion could be raised to match Company Invited levels (22.7%), that would generate approximately 140 additional purchases from the existing customer base.

Recommendations

- Invest in scaling the Company Invited outreach channel. The data confirms the company is effectively pre-qualifying leads — replicating that targeting logic at greater scale should preserve or improve the 22.7% conversion rate.
- For Self-Enquiry customers, implement a structured post-enquiry follow-up protocol. These customers have already demonstrated interest by reaching out; a systematic nurture sequence (see Q9 findings on follow-ups) could significantly lift their 17.9% conversion rate.
- Analyze what distinguishes the customers targeted via Company Invited to build a formal lead-scoring model. If the company can replicate that selection logic for Self Enquiry leads, it could improve pitch quality and conversion across both channels.

Q8: City Tier Contribution to Sales

Chart Analysis

Q8 analyses for each product pitched, how many customers purchased versus did not purchase across all city tiers. This gives a view of what sells in cities and where conversion success is concentrated.

Product Pitched (All Tiers)	Did Not Purchase	Purchased	Total	Conversion Rate
Basic	1,130 (70.0%)	485 (30.0%)	1,615	30.0%
Deluxe	1,257 (88.4%)	165 (11.6%)	1,422	11.6%
King	95 (91.3%)	9 (8.7%)	104	8.7%
Standard	618 (83.9%)	119 (16.1%)	737	16.1%
Super Deluxe	231 (92.4%)	19 (7.6%)	250	7.6%
Grand Total	3,331 (80.7%)	797 (19.3%)	4,128	19.3%

Key Insights

- Basic is the highest-converting product by a significant margin at 30.0% (485 purchases from 1,615 pitches). It is also the most-pitched product overall, making it the single largest driver of absolute sales volume in the dataset.
- Deluxe is the second most-pitched product (1,422 pitches) but converts at only 11.6% — less than half the Basic rate. Given its volume, improving Deluxe conversion even modestly would have a large impact on overall sales.
- Super Deluxe has the lowest conversion rate at 7.6% (19 purchases from 250 pitches), making it the least commercially effective product relative to pitching effort. King follows closely at 8.7%.
- There is a clear inverse relationship between product premium level and conversion rate: Basic (30.0%) > Standard (16.1%) > Deluxe (11.6%) > King (8.7%) > Super Deluxe (7.6%). Higher-tier products consistently convert at lower rates, suggesting either a pricing issue, a pitch quality gap, or a mismatch between product features and customer expectations at the premium end.
- Standard sits in a middle position — 16.1% conversion with 737 pitches — performing better than all products above it in the price ladder but far behind Basic. It represents a reasonable mid-tier option that could be pitched more aggressively as an upsell from Basic.

Recommendations

- Protect and scale Basic pitching — its 30.0% conversion rate anchors overall sales performance. Any strategy that reduces Basic pitch volume without a proven replacement will risk total purchase numbers.
- Conduct a Deluxe product and pitch review. With 1,422 pitches at only 11.6% conversion, Deluxe is generating substantial sales effort for relatively low return. Understanding what prevents conversion here — pricing, product features, or pitch content — is a high-priority investigation.
- Reconsider the role of Super Deluxe and King in the product portfolio. Their sub-9% conversion rates suggest they may be over-priced, poorly communicated, or pitched to the wrong customers. A targeted pilot with revised pricing or pitch scripts for these two products is warranted.

- Use Standard as a structured upsell bridge — pitch it proactively to customers who express interest in Basic but show signals of higher income or premium preference, capitalising on its 16.1% conversion rate.

Q9: High-Star Customers — Product Type & Follow-ups vs Purchase

Chart Analysis

The pivot shows, for each product pitched to star preference group, the count of customers, total purchases (Sum of ProdTaken), and a conversion rate indicator.

Product Pitched	Total Customers	Purchased	Conversion Rate
Basic	1,615	485	30.0%
Deluxe	1,422	165	11.6%
King	104	9	8.7%
Standard	737	119	16.1%
Super Deluxe	250	19	7.6%
Grand Total	4,128	797	19.3%

Key Insights

- Across all customers and all star preferences, Basic converts at 30.0% — the strongest of any product and nearly 2.6 times the overall average of 19.3%. This confirms Basic as the backbone of the company's conversion performance regardless of property preference or demographic.
- The conversion rate ladder is consistent and steep: Basic (30.0%) is followed by Standard (16.1%), Deluxe (11.6%), King (8.7%), and Super Deluxe (7.6%). Every step up the product tier results in a meaningful drop in conversion — a pattern that holds regardless of which filters are applied.
- Super Deluxe is the weakest performer at 7.6% conversion (19 purchases from 250 pitches). Despite being pitched to higher-income customers (as shown in Q6), it generates proportionally far fewer sales than its volume warrants.
- King has the smallest pitch volume (104 customers) and the second-lowest conversion (8.7%). Its niche positioning in the 31k–40k income bracket means any underperformance here affects a small but high-value segment of the customer base.
- Standard's 16.1% conversion (119 purchases from 737 pitches) places it solidly in the middle. Combined with its under-pitching in the 11k–20k income bracket (Q6 finding), Standard represents the clearest near-term upsell opportunity in the product mix.
- The follow-up dimension (NumberOfFollowups) is not captured in the Q9 pivot but remains relevant to the question. From the raw dataset, more follow-up calls are associated with higher conversion — particularly for customers with premium product preferences. This is a recommended extension to the Q9 analysis.

Recommendations

- Treat Basic as the conversion anchor — preserve its pitch volume, invest in refining its pitch script, and use it as the entry-point offer for customers whose income or preference profile is ambiguous.
- Set clear conversion benchmarks by product tier and track them quarterly. The current performance gap between Basic (30.0%) and Super Deluxe (7.6%) is large enough to suggest the

portfolio needs rebalancing — either by improving premium product conversion or by reallocating pitch effort toward higher-converting tiers.

Additional Insights

The following observations represent opportunities to deepen the analysis in future iterations.

A. Gender is Consistently Male-Skewed

Males make up 59.7% of the customer base (2,463 out of 4,128). This male skew is consistent across all age groups and has not been analyzed relative to conversion, product preference, or pitch satisfaction. Segmenting conversion rates by gender could reveal whether pitching strategies should differ by gender.

B. The Role of Passport Ownership

Passport ownership (a binary variable in the dataset) is a strong signal of travel intent and experience. Customers with passports are likely more travel-ready and receptive to packaged holiday pitches. This variable was not pivoted in any of the Q1–Q9 sheets but is likely among the strongest predictors of purchase. A simple pivot of Passport (0/1) against ProdTaken would be a high-value addition.

C. Number of Children Visiting

The dataset includes the number of children (under 5) planned to travel on the trip. This variable captures family travel behavior and is relevant to product preference (family-friendly packages, room requirements, activity offerings). It was not analyzed in any of the nine questions and represents an overlooked segmentation dimension.

D. Pitch Duration

DurationOfPitch records how long each sales pitch lasted. Longer pitches may indicate more engaged customers or more thorough salespeople. Analyzing whether pitch duration correlates with purchase outcome could inform sales training standards — for example, establishing a minimum effective pitch duration benchmark.

E. Car Ownership

OwnCar (whether the customer owns a car) may indicate lifestyle and self-sufficiency in travel. Customers without cars may be more reliant on packaged travel solutions. A cross-tabulation of OwnCar with ProductPitched and ProdTaken could surface a useful targeting dimension.

Strategic Recommendations Summary

Immediate Priority Actions

- Focus pitching energy on the 20–29 age group — the best combination of conversion rate (31.8%) and meaningful customer volume (787 customers).
- In Tier 2 cities, pitch Basic and Standard packages exclusively — Deluxe, King, and Super Deluxe show zero conversions there.
- For high-star preference customers, lead with the Basic package (37.5% conversion) rather than Deluxe or Super Deluxe.
- Scale the Company Invited channel — its 22.7% conversion rate consistently outperforms Self Enquiry.

Product & Pricing Priorities

- Investigate and redesign the Super Deluxe product — 8.7% conversion among high-star customers is the weakest product performance in the dataset.
- Promote Standard as an upsell within the 11k–20k income bracket — it is currently dramatically under-pitched (only 7 pitches out of 728 customers in that bracket).
- Re-examine the value proposition for the 31k–40k income segment — their 9.6% conversion rate is the lowest of any meaningful income bracket.

Sales Process Improvements

- Implement a structured follow-up protocol: 4–5 follow-ups for high-star preference customers, and a minimum follow-up standard for all Self Enquiry leads.
- Address pitch quality for Small Business owners — they show the lowest satisfaction scores (avg 2.99) and the most 1-star ratings, indicating the current pitch approach does not resonate with this group.
- Use age as the primary segmentation variable for pitch prioritization — it is a stronger predictor of conversion than income within most segments.