**UK Bank Customer Demographics Analysis Using Tableau**

**Introduction:** This report offers a comprehensive analysis of customers for a UK-based bank, utilizing Tableau for data visualization and MS Excel for data retrieval and manipulation. The objective is to provide insights into the bank’s regional customer distribution based on factors such as age groups and account balances, aimed at supporting informed decision-making. By examining these demographics, the analysis helps assess customer interest across various regions of the UK, enabling the bank to optimize its services and better cater to customer needs.

Additionally, this bank is relatively new, having operated for only a year, with all customers joining in 2015 from January to December.

**Data Sources:** The primary data source for this analysis is an Excel file titled "P1\_UK\_Bank\_Customers," containing customer details such as balance, joining date, age, etc. (this is dummy data for an imaginary bank operating in the UK.)

**Methodology:** The following steps were performed to create a comprehensive sales dashboard using Tableau and Excel:

1. The "P1\_UK\_Bank\_Customers" Excel file was imported into Tableau.
2. Data transformation operations included:
   1. Checking for null values (none found).
   2. Verifying data types and making necessary corrections.
   3. Ensuring data consistency by identifying and handling duplicate values.
3. After thorough data analysis, a dashboard and storyline were created to facilitate customer analysis for the bank.
4. The Tableau dashboard included various chart types such as Map, Bar Chart, Pie Chart, and Tree Map.

Additional features incorporated:

1. Parameters titled balance group and age group for charts distribution by balance and distribution by age respectively.
2. Use of Calculated Fields.
3. Table calculations.
4. Use of Bins for Age groups and Balance groups.
5. Use of Annotations in the Storyline.
6. Interactive dashboard functionality with action filters linking all charts.

**Data Analysis Findings:** The storyline highlights the following insights:

1. Overview of customer demographics across all regions.
2. In England, a majority of customers are white-collar workers.
3. Scotland primarily consists of males aged between late 40s to early 50s, with lower representation of white-collar workers.
4. Customers in Wales show above-average representation in mid-sized balance categories.
5. Northern Ireland is predominantly represented by female customers in younger age groups.

Best regards,  
Shivam Sharma