

UK Consumer Finance online intelligence report, Dec 2011 – May 2012

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Abstracts

What will you get from this report?

A who's who in online consumer finance.

In-depth market analysis covering December 2011 to May 2012.

Over 100 individual pieces of key insights.

Over 50 individual pieces of statistical interpretation.

Analysis of the top 50 brands across the top 100 keywords.

An interpretation of the top brands search and social media strategies.

What questions do we answer?

Who are the market leaders?

Which keywords are driving market visibility?

What are brands doing to achieve maximum market share?

How are brands using social media to acquire customers?

Top Insights

Price-comparison operators dominate both search marketing and social media.

Moneysupermarket is the only operator that is visible in the top 10 for all the primary keyword product markets.

Despite the economic downturn following the financial crisis in 2008, recent trend analysis shows a gradual increase in search impression volume for keyword markets such as current accounts, credit cards and loans.

The pay day loan market which sits outside of the traditional retail banking arena has seen the most dramatic increase in search impression activity.

As aggregators monopolise the organic index, paid search has become a key channel to market for many of the traditional retail banks including HSBC, NatWest Bank and Barclays Bank.

Compare The Market is the most innovative operator within social media, making the channel a key element of their online market strategy.

Very few of the traditional retail banks are utilising social media to develop a two way dialogue that stimulates social integration and engagement.

Key Findings of the report

What's the size of opportunity within the consumer finance sector?

A macro analysis of the consumer finance sector tells us that insurance and loans dominate the search impression volume with a collective 69%.

The dominance of insurance and loans is underpinned by high search impression volume for keyword markets such as car insurance (22%), pay day loans (21%) and loans with 12%. This stands in contrast to the traditional core consumer finance services market i.e. current accounts and savings, which has a much lower collective search impression volume of only 10%.

Who are the leading brands?

Barclays Bank, HSBC, RBS, NatWest, Lloyds TSB, Halifax Bank and Santander take the lions share covering an impressive 82% of all brand search impression volume.

Traditional high street banking retailers dominate our brand index with Moneysupermarket being the only non-lending operator who feature in the top ten.

Moneysupermarket leads the organic rankings for nine out of ten keyword markets including the high volume sub verticals car insurance, loans and mortgages.

Money Saving Expert has a strong presence within many keyword verticals including loans, car and travel insurance. Their purchase by Moneysupermarket will give the group a massive search impressive coverage across many verticals.

As part of an aggressive strategy to challenge the dominance of the aggregators Google has launched their own price comparison within the keyword markets credit cards, current account and savings accounts.

PPC is a key channel to market for many retail banks or direct financial lenders. This is largely down to the fact that price comparison sites dominate the organic index for a large number of keyword verticals.

Supermarket giants Tesco Bank and Sainsbury's Bank are providing consumers with a cost effective alternative and feature prominently for the keyword markets loans and car insurance.

Tesco Bank, along with confused.com, has developed a social strategy that has the most robust balance between engagement quality and volume.

Operators are primarily using price promotions and customer service content techniques on social media to engage with potential and existing customers.

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