

## FINANCIAL SERVICES ADVISOR™

Monthly insights from Compete for financial services executives

### Reaching Online Traders at Leading Financial News Sites

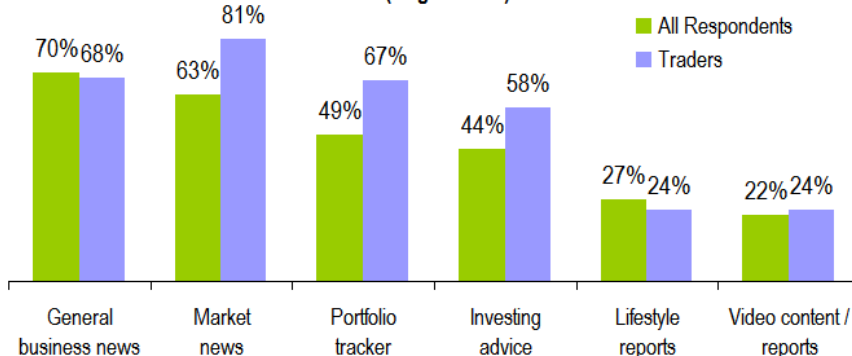
For financial services firms, online traders represent a lucrative market segment and understanding their online behavior is the first step in engaging them. Compete recently conducted a study to determine where online consumers turn for business and financial news and which features of those sites they value most. Among online business sites, **Forbes.com** leads the pack. In August, the Forbes site received over 47% of total visits to the top five business magazine sites.

In a supplemental survey targeting recent business magazine website visitors, Compete assessed the extent to which consumer opinion was aligned with site traffic. While **CNN Money** and **Yahoo! Finance** were the most recalled brands among survey respondents, it was **Forbes.com** that had the highest aided recognition. Within the online trader segment, **Forbes.com** enjoyed even higher brand awareness – 87% of respondents reported they knew of the site.

Other key findings of the survey included:

- Financial site visitors rated WSJ.com, Yahoo! Finance and CNN Money the most informed among top financial news and information sites
- When asked which site they first turn to for breaking financial information or business news, respondents rated highly the same three sites and also cited MSN Money
- Site visitors reported they most highly value the “general business news” and “market news” these sites provide; those who trade online add “portfolio tracker” to the list of site functionality they find most helpful (see exhibit below)
- About 1 of every 3 recent financial information and news site visitors who responded to our survey reported that they trade stocks, mutual funds or other investments online; 24% of those who said they traded did so at least once a month.

Percent of Survey Respondents Rating Functionality “Important”  
(August 2006)



### Monthly Metrics

#### Financial Services Indicators Month-over-Month Change (July 2006 – August 2006)

Top non-branded search terms		
<b>Insurance terms</b>		
auto insurance	▼	-17%
car insurance	▲	1%
insurance	▼	-7%
<b>Brokerage terms</b>		
stock(s)	▼	-12%
mutual fund(s)	▲	20%
cd rates	▼	-9%
<b>Home loan terms</b>		
home equity loan	▼	-8%
mortgage calculator	▼	-3%
mortgage rates	▲	10%
<b>Prospect and Applicant Volume</b>		
Product category	Prospects	Applicants
insurance	▼ -12%	▼ -1%
brokerage	▼ -2%	▼ -12%
home loan(s)	▲ 2%	▼ -14%

Overall, online financial services prospect and applicant volumes fell in August, typical of the “end of summer” period. Interestingly, the number of home loan prospects (active online shoppers) increased, even as the housing market declined. The drop in online applicant volume suggests that consumers were primarily seeking rate information, which would also explain the increase in searches for mortgage rates.

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Direct your comments to Mike Bailey at: [financialservices@compete.com](mailto:financialservices@compete.com)

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