

AN ANALYSIS OF THE UK DOMESTIC ENERGY SECTOR

SEARCH MARKETING DOMINATION BY COMPARISON SITES



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ABOUT THIS REPORT

About the author

Rob Marsden — Head of SEO, Search Laboratory

Rob Marsden is the Head of SEO at Search Laboratory. He has 10 years' experience designing and implementing SEO strategies for some of the world's best-known brands.

If you have questions directly for Rob you can contact him at:
rob.marsden@searchlaboratory.com
www.linkedin.com/in/robmarsden1



About SEOLab™

[SEOLab™](#) is Search Laboratory's proprietary suite of tools for data collection, competitor analysis, and performance monitoring for SEO. Our SEO strategists and account management team use SEOLab to ensure that our clients' digital marketing is always aligned with their business objectives.

The SEOLab suite includes SERPLab™. SERPLab is a powerful market investigation tool that delivers insights all the way down to keyword level, and is one of the primary tools we have used to generate this report.

Award-winning SEO services

Search Laboratory is one of the largest independent digital marketing agencies in the UK. We have over 140 staff delivering SEO, paid media, social media, analytics and data science services from offices in Leeds, London and New York.

Our SEO team is our largest team, and was voted 2017 [Organic Team of the Year](#) in the internationally-recognised DRUM Search Awards.



INTRODUCTION

Who should read this report

This report will be of interest to marketing directors, marketing strategists and marketing managers in UK domestic energy suppliers.

Marketers in other sectors that are dominated by price comparison sites will also be able to draw lessons from this report, including **car and home insurance**, **online travel**, and **phone and broadband** service providers.

What this report covers

This report answers the following questions:

- How have comparison sites come to dominate organic search results?
- What are the most important SEO ranking factors in the energy sector?
- How can energy suppliers capitalise on the success of comparison sites?
- Which energy suppliers receive the most traffic from comparison sites?
- Which are the most visible energy websites?
- Which search terms drive the most traffic?
- What trends are there in organic search for the energy sector?
- What is the device usage split across desktop and mobile?
- What is the split between paid and organic traffic?
- Which search terms have the highest cost-per-click?
- What opportunities are there to target search terms where comparison sites are not dominating?

Methodology

The data in this report was generated in Q1 2017 using premium software tools including:



KEY RECOMMENDATIONS

- Use keyword and page-level analysis to identify actionable insights for SEO, rather than aggregated ranking variance analysis
- Undertake conversion rate optimisation tests on landing pages to maximise ROI from comparison site traffic
- To increase traffic conversion rates, invest in campaigns that raise brand awareness and trust
- Run regular reports to identify keywords that the comparison sites do not dominate, and target them through technical SEO, content and online PR activities
- To increase click-through rates, generate a 'halo effect' via campaigns that build brand trust
- Ensure that your login page is indexable so that search engines can return the correct page
- Create prominent, optimised, dedicated pages for smart meters and other energy-saving technologies
- Ensure you have a high-performance mobile website
- Use PPC keyword data to minimise SEO investment risk.

WHY COMPARISON SITES DOMINATE THE SERPS

Comparison sites have invested heavily in digital marketing and succeeded in becoming very visible in recent years. They now have a dominant presence in the energy sector SERPs, and most of the [44 active suppliers of domestic energy](#) identified in our research are heavily dependent on their referral traffic.

There are three key factors behind their dominance.

1. Satisfying the intent of high volume searches

Comparison sites succeed because they have the sole aim of returning a set of results that satisfies the intent of high volume searches. One of the biggest volume (non-brand) terms in the energy sector, for example, is 'energy comparison'.

When a user searches for 'energy comparison', they don't want to compare products from a single supplier – they want to compare across the whole market.

Comparison sites, by design, are perfectly positioned to meet this intent. So it's unsurprising that every single result on the first page of Google is a comparison site.

A search term where the intent is less clear is 'energy prices'. From this phrase, we know that the searcher wants to see prices but they haven't requested any sort of comparison in the query.

When the searcher's intent isn't completely clear, Google will normally return a mixture of results so that there are at least some relevant results for each user making this search. This is what we see in this result, although interestingly, all three of the top positions are still occupied by comparison sites, suggesting they do the best job of satisfying the searcher's intent.

Because comparison sites do such a good job of satisfying the user intent across many terms in the energy industry, Google will reward them with a strong presence in the search results.

Compare Energy Prices - Lower your Gas & Electricity Bills

<https://www.moneysupermarket.com/gas-and-electricity/>

★★★★★ Rating: 4.6 - 10,521 reviews

UK homeowners can make huge savings by using moneysupermarket.com to switch their gas and electricity to a cheaper tariff. ... So to pay less on your utility bills use our energy comparison tool to find great prices and switch your gas and electricity supplier today.

Switch energy supplier · Comparing Electricity · Dual Fuel · Energy price changes

Energy - Compare the Market

<https://www.comparethemarket.com/energy/>

Whether you're looking for a dual fuel tariff or separate gas and electricity bills, we've got you covered. With a few quick and simple questions, we can start showing you options from energy providers across the UK. On average our customers could save £200** on their annual energy bill.

Compare Energy Prices | Cheapest Gas and Electricity - uSwitch.com

<https://www.uswitch.com/gas-electricity/>

We impartially compare all of these suppliers and more.... Quickly compare your energy and save up to £618* Save up to £618 on your energy bills: Between 1 June and 30 November 2016, at least 10% of people who switched energy supplier for both gas & electricity with uSwitch.com ...

Cheap Gas & Electricity · Compare electricity prices · Sign in to uSwitch.com · E...

Compare Gas & Electricity | Energy Comparison - UKPower.co.uk

<https://www.ukpower.co.uk/>

UKPower.co.uk is an Ofgem accredited energy comparison website. Compare gas and electricity prices from all UK suppliers and find the cheapest energy deal.

Energy Comparison - Compare Energy Prices & Save £££'s

<https://www.simplyswitch.com/>

Find the cheapest energy prices by comparing gas and electricity deals. Use our leading energy comparison tool to get the cheapest gas and electricity.

Compare Gas and Electricity suppliers - Which? Switch

Compare Energy Prices - Lower your Gas & Electricity Bills

<https://www.moneysupermarket.com/gas-and-electricity/>

★★★★★ Rating: 4.6 - 10,521 reviews

Use this information to find a better deal, switch to a cheaper tariff and save on your energy bills. Energy suppliers update their tariffs on a regular basis. Our gas and electricity comparison services works to bring you the most competitive deals as soon as they're available.

Switch energy supplier · Comparing Electricity · Dual Fuel · Energy price changes

Compare energy prices | Find Cheap Energy Deals - uSwitch.com

<https://www.uswitch.com/gas-electricity/guides/compare-energy-prices/>

Use our free, simple and impartial website to compare energy prices and find the cheapest gas and electricity deal for your home. Stop overpaying today.

Compare Energy Prices | Cheapest Gas and Electricity - uSwitch.com

<https://www.uswitch.com/gas-electricity/>

We impartially compare all of these suppliers and more.... Quickly compare your energy and save up to £618* Save up to £618 on your energy bills: Between 1 June and 30 November 2016, at least 10% of people who switched energy supplier for both gas & electricity with uSwitch.com ...

Compare Gas & Electricity Suppliers at comparethemarket.com

<https://www.comparethemarket.com/energy/>

Jump to How quickly can I compare energy prices? - Seriously - on average it takes about four minutes to compare energy prices. That's right, four ...

Gas and electricity · Dual fuel energy · Compare electricity · Compare gas

Energy Comparison - Compare Energy Prices & Save £££'s

<https://www.simplyswitch.com/>

Find the cheapest energy prices by comparing gas and electricity deals. Use our leading energy comparison tool to get the cheapest gas and electricity.

Compare Gas & Electricity | Energy Comparison - UKPower.co.uk

<https://www.ukpower.co.uk/>

MacBook

2. Brand awareness and trust

Leading comparison sites have invested heavily in brand building and establishing trust in their target markets. The monthly search volume shows how big they have become.

Brand search volumes

Keyword (By Relevance)	Average Monthly Searches, Jan 2016 - Jan 2017
Compare the Market	1,500,000
GoCompare	1,000,000
British Gas	823,000
MoneySupermarket.com	673,000
Money Saving Expert	368,000
uSwitch	301,000

Source: Google Keyword Planner

Based on search volume alone, Compare the Market is nearly twice as big as British Gas, which is by far the biggest energy supplier as far as search volume goes.

3. Strong backlink profiles

These brands have also invested in building powerful external link profiles.

The following table illustrates how British Gas – the most searched for UK energy supplier with over 200 years of history and brand awareness – has been out-linked by uSwitch, a comparison site which was founded relatively recently in 2000.

Backlinks: British Gas vs. uSwitch

	britishgas.co.uk	uswitch.com
Target Type	Root Domain	Root Domain
Trust Flow	58	66
Citation Flow	46	53
Referring Domains	22,609	47,835
External Backlinks	1,843,938	4,288,484
Indexed URLs	285,522	830,218
Class C Subnets	7,617	14,598
Referring IP Addresses	11,177	23,721
Educational Referring Domains	70	157
Educational External Backlinks	1,451	851
Governmental Referring Domains	213	212
Governmental External Backlinks	15,968	1,904

Source: Majestic SEO

In summary, comparison sites have come to dominate because:

1. In a lot of energy SERPs, they do a great job of satisfying the user's intent
2. They are strong brands with a lot of search demand and Google wants to recognise and reward that
3. They have very powerful external link profiles powering their rankings.

ENERGY SECTOR SEARCH RANKING FACTORS

Sector-wide 'aggregated' data analysis

Many SEO commentators look for sector-specific variances in aggregated data to inform SEO strategies.

This approach looks at particular keywords, or keyword sets, and analyses the aggregated data for a specific industry to see how different ranking factors influence the SERPs in the target sector.

These sector-specific results are then compared with the results across all searches; the theory being that the largest statistical variances in correlation between the two will provide unique insights into what has the largest - or smallest - impact on page rankings in that sector.

We then used SERPLab to obtain data on SERPs. SERPLab records data for over 50 different metrics relating to keyword-domain pairings, and gives us visibility of who ranks for a keyword, and why they do.

The results led us to conclude that there are some variances between the energy sector when compared with "all market" data, but that statistically the variances are not significant enough to draw any actionable insights. Our analysis is summarised here:

THE STATISTICAL WEAKNESS OF AGGREGATED RANKING VARIANCES

- Keyword count in the page title was three times as closely correlated in the energy sector compared to general web traffic: positions were, on average, improved when the keyword appeared in the page title
- Page authority has a lower correlation in the energy sector than in other industries, reflecting a high level of ambiguous user intent in keywords such as 'energy', 'electricity', and 'gas'
- URL trust flow and citation flow also showed a lower correlation with page ranking in the energy sector than it does in other sectors
- Keyword count in URL and H1 correlation was higher within the energy sector: positions were on average improved when the keyword appeared in the URL and main heading (H1) of a page

This appears to be interesting, however...

- In all of the above examples, whilst the variances in correlation scores appear significant, the actual correlation scores were still low, usually in the 0.1 to 0.25 region
- This leads to the conclusion that aggregated analysis of ranking variances provides insufficient evidence for actionable insight.

Analysis by page and keyword

Using SERPLab, we also undertook detailed granular analysis.

SERPLab is able to look SERP by SERP at keyword level data, which gives us the ability to make data-driven optimisation decisions.

To illustrate how we do this, we undertook a case study on the SSE website using the search term 'control heating from phone'.

The following pages show the results.

CASE STUDY: SSE AND 'CONTROL HEATING FROM PHONE'

This case study illustrates our recommended approach to sector-specific SEO analysis. SSE is not a client of Search Laboratory, and we did not consult with SSE over our choice of keywords. Our decision to use the SSE website in this case study in no way indicates that we think the website is any better or worse than its competitors.

- Keyword: control heating from phone
- Search volume: very seasonal, peaks in January. The search volume in January 2017 was 720. Year-on-year search volumes increased 180% in May 2017.

For this case study we used a keyword search that is a) relevant to the energy sector, and b) has a substantial volume of searches that are increasing year-on-year.

SSE is currently ranking this page for 'control heating from phone': <https://www.sse.co.uk/home-services/tado>. At the time of writing, the page was ranking in **position 22**, which is near the top of page 3 of Google.

The #1 position was achieved by British Gas for this page: <https://www.britishgas.co.uk/smart-home/hive.html>.

We used SERPLab to investigate why this page is not on page 1. The results are summarised below.

Anchor text

Using keywords in anchor text has been shown to influence search results in some cases, but it risks triggering penalties following the Penguin update. As a result, we recommend only obtaining earned links where you have no control over anchor text.

An analysis of the percentage of links that use all or part of the keyword shows that none of the top ranking pages use this 'commercial' technique, and neither does SSE:

SSE % Commercial	Top 10 % Commercial	#1 % Commercial
0.0%	0.0%	0.0%

We would not therefore recommend anchor text links as a way to improve SSE's page ranking for this term.

Brand metrics

Using SERPLab's measure of online brand strength, SSE does score lower than the average of the top 10 but only just:

Priority	Measure	Top 10 Average	SSE Score	#1 Score	SSE % +/- Average (Normalised)
Medium	Brand strength	0.09	0.08	0.16	-3%

Domain level link metrics

At domain level, there is a noticeable authority gap in link metrics. The gap is larger compared with the number 1 ranking URL than it is with the average of the top 10 results:

Priority	Measure	Top 10 Average	SSE Score	#1 Score	SSE % +/- Average (Normalised)
High	Domain citation flow	53.8	41	55	-28%
High	Domain trust flow	42.7	33	62	-34%
High	Domain linking root domains	47072.9	1080	5363	-11%
High	Domain links	5474311.1	55730	258091	-11%
High	Domain authority	59.39	56.31	63.71	-4%

Page level link metrics

At page level, the gap is even more noticeable:

Priority	Measure	Top 10 Average	SSE Score	#1 Score	SSE % +/- Average (Normalised)
High	Page authority	42.38	1	46.01	-78%
High	URL citation flow	32.6	17	44	-58%
High	URL trust flow	24.5	0	54	-45%
High	Page linking root domains	67.4	2	14	-12%
High	Page links	5044.4	2	71	-10%

Content metrics

A review of the different metrics that SERPLab collects for content shows that the SSE content isn't as in-depth and the topical relevance is low. Looking at the page, it's clear to see that the content is thin.

Also, we can see that the page heading and metadata have not been optimised:

```

16 <head>
17   <meta http-equiv="X-UA-Compatible" content="IE=edge">
18   <meta charset="UTF-8">
19   <title>Tado intelligent heating control - SSE</title>
20   <meta name="title" content="Tado intelligent heating control - SSE">
21   <meta name="description" content="The Tado Smart Thermostat lets you control your heating and hot water via a smartphone app, so your heating is on only on when you need it, and you won't spend more than you have to. ">
22   <meta name="DC:Language" content="en">
23   <meta name="viewport" content="width=device-width, initial-scale=1, maximum-scale=2, user-scalable=yes">
24   <meta name="google-site-verification" content="48VU2PM801-c8E_LadMyIT55IPN9u0nD68JH89Q" />
25   <meta name="canonical" content="https://www.tado.co.uk/thermostat-smart-controller?ref=seo" />
26   <meta name="HandheldFriendly" content="true" />
27   <meta name="mobileOptimized" content="true" />

```

Technical metrics

As well as content and link metrics, we also used SERPLab to compare a number of technical metrics against pages ranking well in Google.

This shows us that SSE's page speed is good across both desktop and mobile when compared with the average of the top 10, although both are slightly slower than the number 1 ranking page.

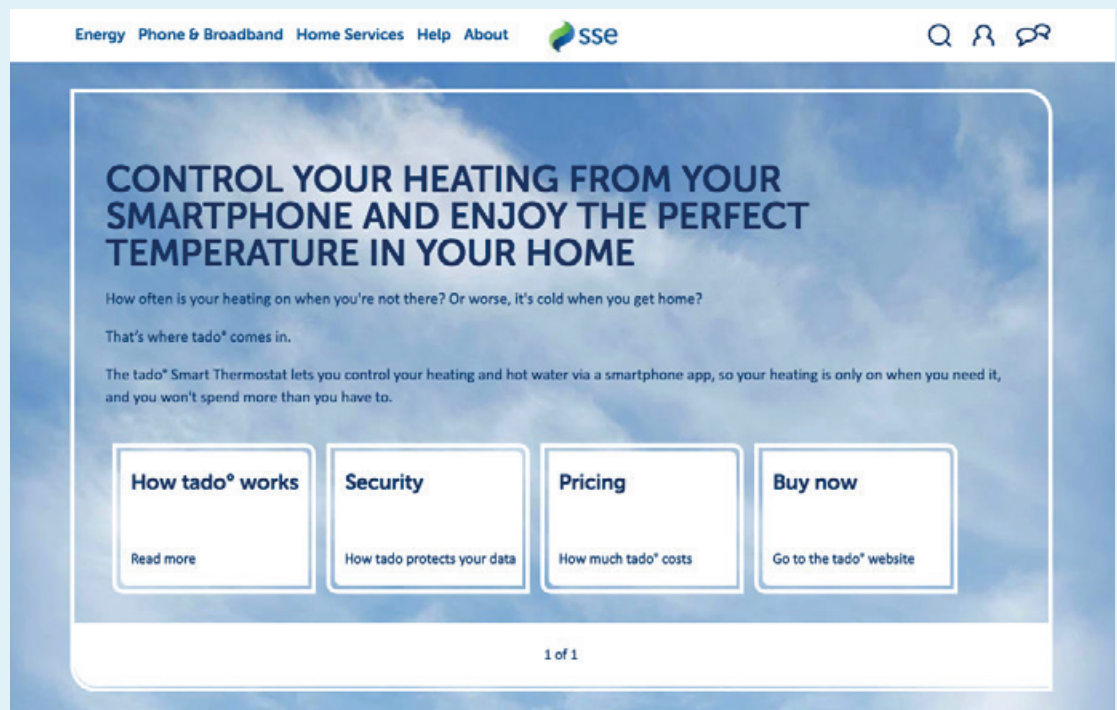
The mobile friendly score is at the maximum score of 100, beating both the average and number 1.

Priority	Measure	Top 10 Average	SSE Score	#1 Score	SSE % +/- Average (Normalised)
High	Page speed score (mobile)	53.3	55	58	4%
High	Mobile friendly score	93.3	100	92	19%
High	Page speed score (desktop)	64.9	74	76	22%

Manual checks

The metrics provided by SERPLab and other tools provide a valuable range of different metrics to help us understand why a page is or isn't ranking on the first page of Google for any given keyword.

This should always be combined with a manual review by an experienced SEO practitioner, which in this case reveals that the content on the page is lacking;



When compared with British Gas's number 1 ranking page, the difference is immediately visible:

My Home My Business

British Gas

Energy Home Services Smart Home Help & Support My Account

What's Hive Active Heating?

It's a smart thermostat that lets you control your heating and hot water from your smartphone, tablet or laptop

So whether you're at work, on the bus or in the pub, the Hive App lets you change the temperature of your home in just a few taps. Hive Active Heating works with your existing heating system and if you have a separate hot water tank, you can control your hot water too.

Why choose Hive Active Heating?

Install	Control	Save	Relax
It'll only take one of our engineers 90 minutes to get Hive Active Heating up and running. And that visit's included in the price. Just pick a time that works for you.	With Hive Active Heating on your smartphone, laptop or tablet, it's as easy to control your heating and hot water as it is to change the TV channel.	You could save up to £130 ²⁰ a year on your energy bills by never having to heat an empty home.	There's no need to change anything else. Hive Active Heating works with the heating system you already have. There's no need to buy a new one or change energy supplier.

What's in the kit?

A wireless thermostat	A hub	A receiver
		
Beautiful design. Clever control. The Hive Active Heating thermostat lets you easily control your heating at home.	Plugs into your broadband router so your thermostat connects to the internet. (We'll set it up for you during the installation.)	Lets your thermostat and boiler talk to each other. It's usually fitted near your boiler, so you'll barely notice it.

The British Gas page has content much better aligned with the intent of a user wanting to understand the options for controlling heating via a mobile phone.

In addition to the screenshot above, the page continues with more information, including a summary of the functionality of the Hive App, a table comparing different purchase options, a range of other Hive products, and concludes with a Frequently Asked Questions section.

There are multiple calls to action and invitations to “find out more” throughout the page, further enhancing the user experience.

Understanding intent

Google is returning different types of results for this keyword. On the first page alone there are:

- 2 x energy suppliers
- 2 x remote heating providers
- A technology site
- A comparison site
- A review site
- A boiler manufacturer

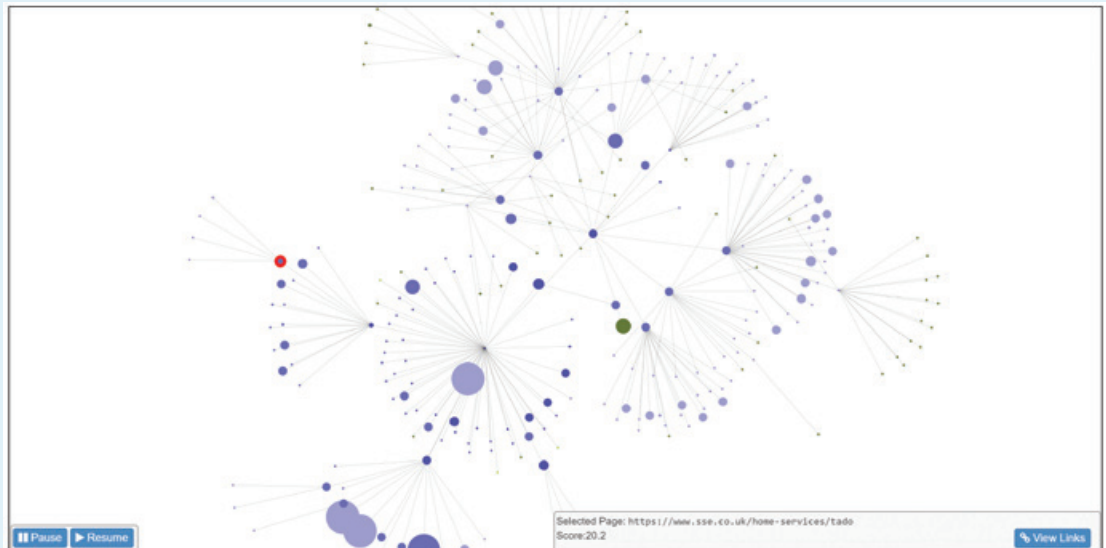
This could signal that the intent behind the query is currently unclear/mixed but the fact that two energy suppliers are in the mix, including the number 1 position, proves that energy suppliers are able to rank well for this query.

Internal link equity

Building internal link equity is a known technique for improving SERP rankings.

SERPLab includes a visual tool to assess how much internal link equity is being passed to a URL. The tool generates a 'spider' image of internal links based on the links between pages, with the number and value of internal links to a URL represented by the size of the 'node' in the image.

Running this analysis on the SSE website shows us that more link equity could be sent to the target page, with the node highlighted in red in this image from SERPLab.



Case study - conclusions

If SSE wanted to optimise this page for search, we would recommend the following:

1. Rewrite the content on the page to make it more engaging, useful and in-depth than other URLs ranking on page 1 - don't give Google an excuse not to rank it based on the quality of the content
2. Lay the on-page SEO foundations with optimised metadata and headings
3. Review internal linking and think about what other pages on the site could link to this URL
4. Build the authority of the page with external link acquisition.

The benefits of this approach also include:

- The quality of the traffic is likely to be high; thinking about how to use a heating system in this way indicates an engaged consumer who is spending time working out how to reduce their heating bills
- Traffic can also be directed to pages for different energy deals and money saving packages on offer from SSE
- Any link acquisition work will benefit the whole site, not just that page
- Retargeting pixels could be added to the content and used to show offers to people who have consumed it – as mentioned above, the people who are thinking about this are likely to be interested in energy offers.

HOW ENERGY SUPPLIERS CAN CAPITALISE ON THE SUCCESS OF COMPARISON SITES

As long as comparison sites continue to dominate the lead acquisition market, energy providers will need to consider strategies to work with them, whilst protecting against the risk they represent to their providers' own brand goals.

Capture and convert traffic from comparison sites

The table below shows the five comparison sites in the energy sector that receive the most organic search traffic, from the top 100 non-brand keywords we used for earlier analysis.

Websites	Domain	Organic Clicks
uSwitch.com	www.uswitch.com	14.17%
MoneySupermarket.com	www.moneysupermarket.com	7.32%
Compare the Market	www.comparethemarket.com	6.32%
UKPower.co.uk	www.ukpower.co.uk	2.66%
Which? Switch	www.which.co.uk/switch	2.36%

Source: Hitwise

Where does the traffic go from comparison sites?

The following table shows how much traffic the main domestic energy providers are receiving from the top 5 comparison sites.

This table shows that more traffic from uSwitch goes to E.ON, SSE, Scottish Power, British Gas and EDF, with Green Star Energy, Budget Energy, and Flow Energy receiving the least.

Traffic from comparison sites can be relatively expensive, and providers should ensure that they undertake regular conversion rate optimisation tests on their landing pages.

Organic referral traffic from top 5 comparison sites: % received by energy companies

Websites	uSwitch	Money Supermarket	Compare the Market	UK Power	Which
British Gas	0.35%	0.17%	0.08%	1.15%	0.64%
Scottish Power	0.37%	0.16%	0.04%	0.92%	0.49%
E.ON Energy	0.54%	0.12%	0.09%	1.56%	1.87%
SSE	0.39%	0.10%	0.01%	0.24%	0.10%
npower	0.20%	0.05%	0.05%	0.88%	1.43%
EDF Energy	0.27%	0.05%	0.09%	1.05%	1.38%
First Utility	0.13%	0.04%	0.02%	0.23%	0.12%
Extra Energy	0.08%	0.03%	0.04%	0.35%	0.59%
Co-operative Energy	0.08%	0.02%	0.01%	0.67%	0.22%
Utility Warehouse	0.05%	0.02%	0.02%	0.23%	0.35%
Ovo Energy	0.11%	0.01%	0.01%	1.79%	2.12%
Sainsbury's Energy	0.05%	0.01%	0.00%	0.05%	0.23%
iSupply Energy	0.02%	0.01%	0.01%	0.11%	0.41%
Utilita	0.01%	0.00%	0.01%	0.00%	0.00%
Ecotricity	0.01%	0.00%	0.00%	0.27%	0.00%
Good Energy	0.01%	0.00%	0.00%	0.00%	0.24%
M&S Energy	0.00%	0.00%	0.00%	0.00%	0.08%
Flow Energy	0.02%	0.00%	0.01%	0.00%	0.10%
Budget Energy	0.00%	0.00%	0.00%	0.00%	0.00%
Green Star Energy	0.01%	0.00%	0.00%	0.15%	0.00%

Source: Hitwise

KEY RECOMMENDATIONS

Undertake conversion rate optimisation tests on landing pages to maximise ROI from comparison site traffic.

IDENTIFYING SEARCH TERMS THAT COMPARISON SITES DON'T DOMINATE

There are still opportunities to increase visibility in SERPs where comparison sites are not dominant. With the right content and link acquisition strategy, energy suppliers can capitalise on this opportunity to increase their organic search share.

At the time of writing, the following search terms return less than four comparison sites on page 1:

Search terms with less than four comparison sites on page 1

Keyword	Number of Comparison Sites in SERPs	Estimated Monthly Search Volume
smart meters	1	73,900
smart metering	1	52,786
smart meter	1	38,006
electricity	1	35,728
smart meters uk	1	21,158
warm home discount	0	14,516
utilities	1	11,594
winter fuel allowance	3	10,428
what is a smart meter	1	9,719
smart energy	0	6,650
utility bill	0	4,371
energy saving	1	3,804
electric meter	2	3,798
gas meter	1	3,533
utility bills	1	3,278
energy efficiency	0	2,906
smart energy meter	1	2,837
energy monitor	2	2,515
electricity bill	2	2,479
average electricity bill	3	2,339
who supplies my electricity	3	1,535
who is my electricity supplier	2	1,508
gas smart meter	1	1,324
smart meter uk	1	1,293

Continued...

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Keyword	Number of Comparison Sites in SERPs	Estimated Monthly Search Volume
winter fuel payment	3	1,256
gas bill	2	1,033
new gas boiler	1	1,017
energy uk	0	829
feed in tariff	0	819
uk energy	1	744
heating allowance	1	728
energy meter	2	711
gas meter installation	1	708
average utility bill uk	2	692
winter fuel payments	3	628
electricity cost calculator	1	478
cheapest fuel	2	478
gas installation	0	414
average gas bill	3	376
energy online	1	158
meter reading	1	62
control your heating from your phone	1	57
winter heating allowance	3	55
how to read electric meter	1	32

Source: SERPLab by Search Laboratory

KEY RECOMMENDATION

Run regular reports to identify keywords where the comparison sites are not dominant, and target them through technical SEO, content and online PR activities.

THE MOST VISIBLE ENERGY WEBSITES IN ORGANIC SEARCH

We researched the top 100 non-brand keywords in the energy market and looked at the sites that were appearing on page 1 of Google the most. We then calculated the share of voice for each site, which takes both ranking position and search volume into account.

The number of keywords ranking in the top 10 is a better indication of organic visibility but a higher share of voice is more likely to lead to higher traffic levels, so both are shown below.

Energy suppliers with the most keywords on page 1

Domain	Count of Page 1 Rankings
www.first-utility.com	41
www.eonenergy.com	23
www.scottishpower.co.uk	18
www.ovoenergy.com	13
www.sse.co.uk	11
www.ecotricity.co.uk	5
www.edfenergy.com	4
www.npower.com	4
www.utilita.co.uk	4
www.britishgas.co.uk	3

Energy suppliers with the highest share of voice

Domain	Share of Voice
www.britishgas.co.uk	28.43%
www.scottishpower.co.uk	6.68%
www.first-utility.com	3.31%
www.sse.co.uk	3.21%
www.ovoenergy.com	1.88%
www.edfenergy.com	1%
www.ecotricity.co.uk	0.72%
www.eonenergy.com	0.58%
www.sainsburysenergy.com	0.33%
www.npower.com	0.17%

Comparison sites with the most keywords on page 1

Domain	Count of Page 1 Rankings
www.uswitch.com	80
www.moneysupermarket.com	67
www.ukpower.co.uk	62
www.simplyswitch.com	58
www.comparethemarket.com	48
www.moneysavingexpert.com	33
www.confused.com	19
www.gocompare.com	18
www.goenergyshopping.co.uk	17
www.money.co.uk	17

Comparison sites with the highest share of voice

Domain	Share of Voice
www.switch.which.co.uk	8.12%
www.comparethemarket.com	6.32%
www.moneysupermarket.com	5.79%
www.ukpower.co.uk	5.68%
www.uswitch.com	5.2%
www.simplyswitch.com	2.91%
www.goenergyshopping.co.uk	2.37%
www.moneysavingexpert.com	1.24%
www.energylinx.co.uk	0.34%
www.gocompare.com	0.27%

Websites receiving the most traffic from key search terms

We ranked the top 10 sites by organic traffic.

Nine out of the top 10 sites are also listed in the visibility table, on the previous page. However, one is not: Sainsbury's Energy.

Sainsbury's Energy captures a disproportionate share of traffic in relation to its visibility i.e. it has significantly higher than average click-through rates. This reflects the 'halo effect' of the Sainsbury's brand, [which is one of the most trusted brands in the UK](#).

The Sainsbury's 'halo effect'

	Websites	Organic clicks
1	uSwitch.com	14.8%
2	MoneySupermarket.com	7.49%
3	Compare the Market	7.18%
4	Hive Active Heating	5.34%
5	GOV.UK	4.97%
6	British Gas	4.66%
7	Sainsbury's Energy	3.25%
8	UKPower.co.uk	2.99%
9	Simply Switch	2.67%
10	MoneySavingExpert.com	2.51%

Source: Hitwise

KEY RECOMMENDATION

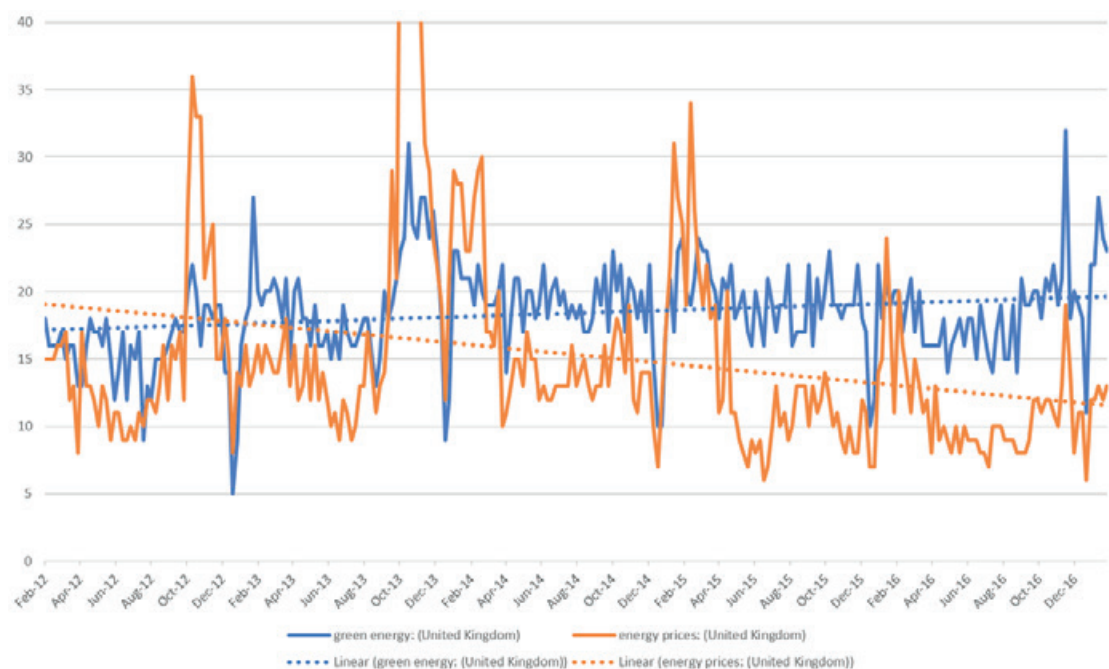
To increase click-through rates, generate a 'halo effect' via campaigns that build brand trust.

SEARCH TRENDS IN THE ENERGY SECTOR

Price vs. the environment

We compared the search trends over the last five years of a broad set of 'energy price' and 'green energy' search terms.

Weekly search volumes: green energy vs. energy prices



Source: Google Trends

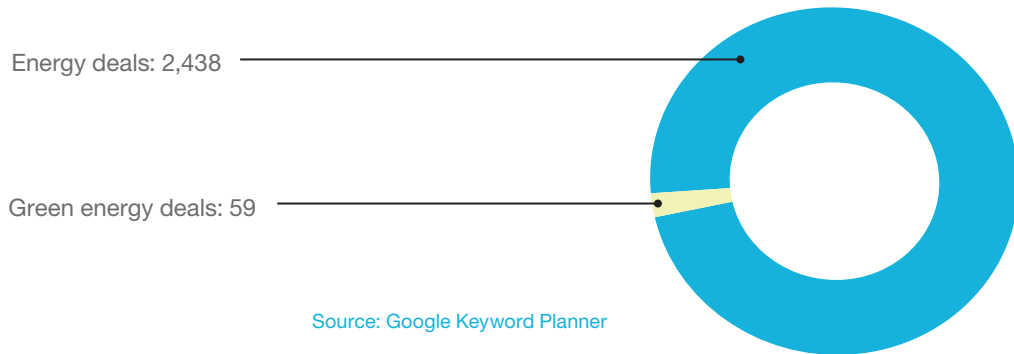
The trend lines for volumes of weekly searches show that searches for green energy are growing whilst searches for energy prices are declining.

Does this signal that more consumers are making energy-buying decisions based on environmental principles?

Unfortunately, we don't think this is a valid conclusion, as the intent behind the search query could be mixed. At the time of writing, Google is returning a mixture of energy suppliers, informational sites and news sites for the term 'green energy'; if the intent was more clearly towards people looking for green energy suppliers, Google would reflect that in its results.

Forecasted monthly search volumes

There are still much higher search volumes for 'energy deals' than there are for 'green energy deals', suggesting that price is still the most important factor.



Search trends: hijacking spikes in search volumes

The significant spike for 'energy prices' searches in October 2013 (see previous page) was generated by national news coverage of price increases in the industry:

The screenshot shows a news article from the BBC website. The main headline is 'Npower to raise energy prices by 10.4%'. The article is dated 21 October 2013 and is categorized under 'Business'. The text of the article states that Npower has become the third major supplier to announce price rises, with a dual-fuel bill to go up 10.4%. The price rise will take effect on 1 December, and is the highest increase announced by any supplier so far. A sub-headline mentions that SSE will increase prices by 8.2% from 15 November and British Gas said. There is also a small image showing a hand holding a pen over a document with 'Npower' written on it. To the right of the article is a 'Top Stories' section with three items: 'Gulf states give Qatar 48-hour extension', 'China calls US warship 'a provocation'', and 'I've killed more than 100 people'.

Spikes of this nature are not unusual, particularly in saturated B2C markets open to public scrutiny.

When spikes do occur, they provide suppliers with an opportunity to raise their brand profile and capture traffic through opportunistic paid media campaigns, including PPC and programmatic display adverts targeting high-volume and often high-value keywords.

We advise our clients on how they can respond quickly when these opportunities arise.

KEY RECOMMENDATION

Build a rapid response team to capture traffic surges using PPC and programmatic media campaigns.

Search terms with the fastest growth: last 12 months

As more suppliers provide online account management, more and more searches are for login pages:

Search Term	Growth
edf login	52.79%
eon login	48.81%
npower login	48.42%
sse login	29.69%
british gas login	21.22%
flow energy	18.01%
sainsbury's energy	14.14%
smart meters	13.25%
coop energy	12.52%
ovo energy	12.25%
isupply	9.91%
southern electric login	8.34%
uswitch	7.37%
pfp energy	6.69%
first utility	6.54%
npower	6.02%
hive heating	5.48%
energy comparison	5.46%
swalec login	5.42%
edf meter reading	5.24%

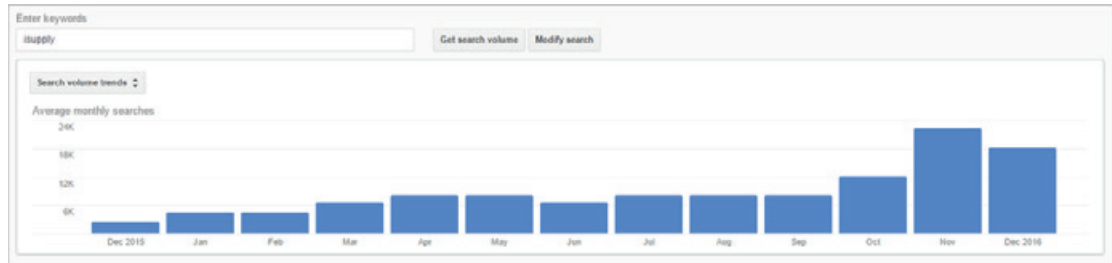
Source: Hitwise

KEY RECOMMENDATION

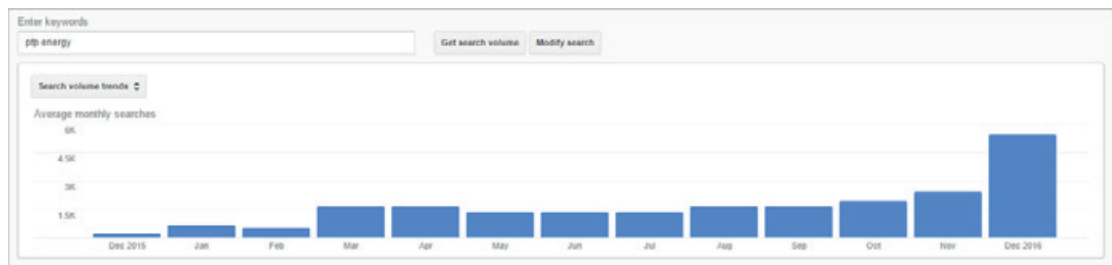
Ensure that your login page is indexable so that search engines can return the correct page.

Fastest-growing brand searches

iSupply was one of the fastest growing brand searches, with year-on-year searches increasing 654%.

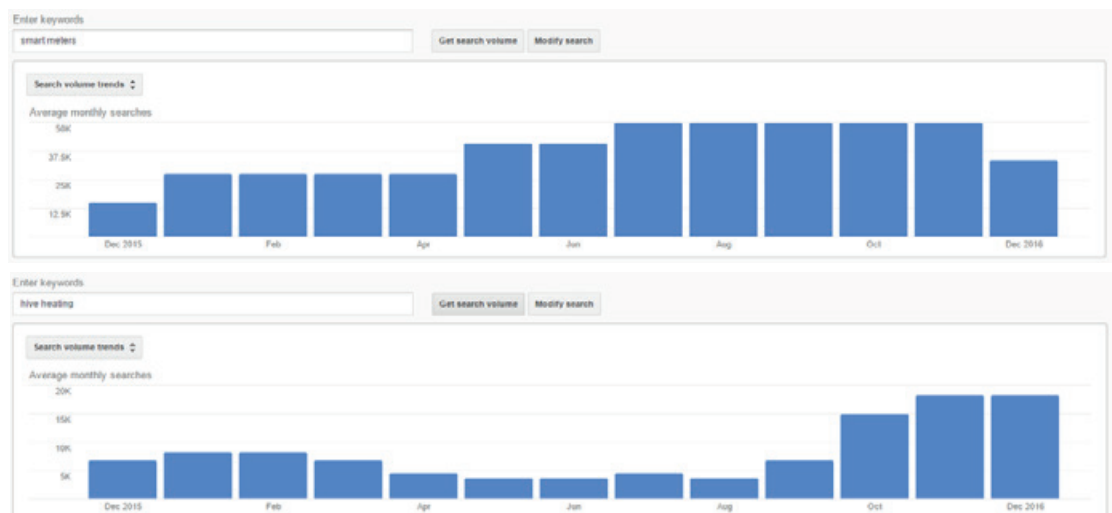


PFP Energy year-on-year brand search volumes increased by 3,076%, although at a peak of 5,400 searches it remains low relative to some of its competitors.



Increasing search volumes for energy saving technologies

Search terms around energy saving technologies also increased, with 'smart meters' and 'hive heating' making the top 20 in terms of growth.



Source: Google Keyword Planner

KEY RECOMMENDATION

Create prominent, optimised, dedicated pages for smart meters and other energy-saving technologies.

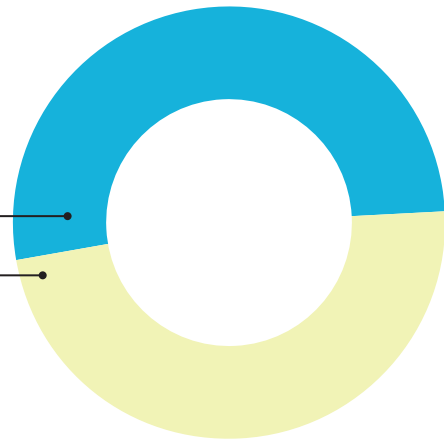
DESKTOP VS. MOBILE

Desktop usage is still slightly ahead at 51.8%, with mobile (including tablet) at 48.2%:

Visitors by device

Desktop: 51.8%

Mobile: 48.2%



Source: Hitwise

Mobile search traffic will soon overtake desktop traffic

Mobile usage grew from 31.2% of the total to 38.7% of the total between January 2016 and January 2017, based on the top 100 non-brand energy sector keywords.

We used an exponential function to describe the mobile proportion trend, and created a forecast for the rest of 2017. Based on this analysis, we predict that mobile will comprise the majority of traffic - 50.34% - by October 2017.

Monthly traffic



KEY RECOMMENDATION

A high-performance mobile website will attract more traffic than a desktop site before the end of 2017.

PAID VS. ORGANIC TRAFFIC

We used Hitwise to analyse the split between paid and organic traffic.

All industries



Utilities



Telecoms



Insurance



Source: Hitwise

As the above charts illustrate, the utilities sector relies on paid search almost three times more than the average for all industries, with 29.97% of traffic coming through paid ads.

When looking at the top 100 non-brand search terms in the utilities sector, the paid mix was even higher at 49.27%. This reflects the dominance of comparison sites.

We also looked at other industries where comparison sites were dominant – telecommunications and insurance. In telecommunications, reliance on paid ads was less than the energy sector at 22.86%.

However, in the insurance sector, reliance on paid ads was even higher at 40.9%.

PPC KEYWORD DATA

PPC keyword data is a good testing ground to understand how well keywords perform, informing SEO strategy.

As a general rule, factoring in conversion rates from AdWords will provide further insight into whether or not a keyword should be targeted for SEO.

Most expensive	Keyword	Monthly Search Volume	CPC	Conversion Rate % (AdWords)	Optimise for SEO?
	cheapest dual fuel energy supplier	40	£26.85	5.6%	Yes
	best rated energy supplier	20	£19.11	0.4%	No
	scottish and southern energy plc	210	£18.34	...	...
	how to switch energy suppliers	140	£18.13	...	...
	small energy suppliers uk	30	£17.14	...	...
	energy price freeze	30	£15.74	...	...
	switch energy supplier	1000	£15.62	...	...
	switch energy suppliers gas and electricity	20	£15.58	...	...
	small energy providers	20	£15.10	...	...
	the big six energy suppliers	20	£14.62	...	...
	edf energy shop	30	£1.58	...	...
	sse energy	5400	£1.57	...	...
	energy complaints	210	£1.57	...	...
	renewable energy	90	£1.57	...	...
	domestic energy	50	£1.56	...	...
	global energy solutions	30	£1.56	...	...
	calculating energy cost	90	£1.56	...	...
	low energy radiators	30	£1.56	...	...
	energy monitor reviews	70	£1.56	...	...
	budget energy derry	390	£1.55	...	...
Least expensive					

Source: SEMRush

In general, PPC keywords in this sector are expensive and highly competitive, reflecting the significant budgets of the market leaders and the high lifetime value of loyal customers.

Where suppliers are running their own PPC campaigns, they can add in conversion rates to further minimise their SEO investment risk. (If the data is available, average transaction margin - or profit - gives increasingly deeper insight.)

KEY RECOMMENDATION

Use PPC keyword data to minimise SEO investment risk.

KEY RECOMMENDATIONS

- Use keyword and page-level analysis to identify actionable insights for SEO, rather than aggregated ranking variance analysis
- Undertake conversion rate optimisation tests on landing pages to maximise ROI from comparison site traffic
- To increase traffic conversion rates, invest in campaigns that raise brand awareness and trust
- Run regular reports to identify keywords that the comparison sites do not dominate, and target them through technical SEO, content and online PR activities
- To increase click-through rates, generate a 'halo effect' via campaigns that build brand trust
- Ensure that your login page is indexable so that search engines can return the correct page
- Create prominent, optimised, dedicated pages for smart meters and other energy-saving technologies
- Ensure you have a high-performance mobile website
- Use PPC keyword data to minimise SEO investment risk.



SEO

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Social media

PPC

Programmatic display

International and multilingual

Analytics and data science

Contact details

Tel: +44 113 212 1211

Web: www.searchlaboratory.com

Email: info@searchlaboratory.com

Leeds head office

Blokhaus
West Park Ring Road
Leeds
LS16 6QG

London

24 Greville Street
London
EC1N 8SS

New York

77 Sands Street
Brooklyn
NY 11201



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