A Note to Our Readers

At the time of this report’s publication, consumer sentiment, market demand and overall economic conditions had become volatile due to the COVID-19 pandemic. This report assesses the digital performance of brands in 2019 and hence the data does not capture the impact of the unfolding COVID-19 situation. These insights and takeaways are related to best practices for cost-efficiencies, content strategy and marketing channel optimization.

Please visit Gartner’s COVID-19 resource center to review our resources on how to protect your people, maintain operations and sustain your organization during the pandemic. We will continue to share more resources and updates over the coming days and weeks.

Our priority is the safety and well-being of our clients, employees and the communities we live in, and our thoughts are with those experiencing difficulty at this time.
Key Findings

- The 10 sites with the highest visibility against investing keyword searches are all publishers of financial services content. For retirement planning keyword searches, publishers comprise six of the top 10 sites.
- Among brands analyzed in Gartner’s “Digital IQ Index: Wealth and Asset Management U.S. 2019,” only four (Charles Schwab, Fidelity, Stash Wealth and Vanguard) earn over 10% visibility against any category of investing keyword searches. Fidelity is the top Index brand for organic visibility in five nonbranded keyword categories, in part thanks to its educational site content.
- Retirement planning keywords “401(k),” “roth ira” and “ira” have higher search volumes than the generic keyword “retirement.” Queries with the word “calculator” make up five of the top 15 retirement planning keywords by search volume.

What Brands Should Be Thinking About

- **Leverage Content Publishers:** Combat low organic search visibility on Google by leveraging content publishers for prospect traffic. Invest in display ads, partnerships and affiliate marketing for direct traffic, and optimize site structure and content to make product and service information easily accessible for publishers.
- **Break Through With Educational Content:** Optimize for search by broadening educational site content coverage to address all knowledge levels and stages of the customer journey — from basic definitions to more advanced market insights.
- **Align Content With Keywords:** Align site content with high-volume, trending and high value, long-tail keywords to improve search engine optimization (SEO) and use as text ad landing pages.

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**Introduction**

Search is a challenging frontier for financial services marketers and cracking the code to organically surface a brand’s site in Google results for nonbranded keywords can seem impossible. Consumers use Google to do their own research on investing, bypassing investment managers who would historically take on that burden for their clients. In Gartner’s “Digital IQ Index: Wealth and Asset Management U.S. 2019,” the most commonly searched nonbranded keyword category was ticker symbol performance, followed by more general investing and retirement planning keywords.

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**Wealth & Asset Management: Average Monthly Search Volume on Google for Top Keywords, by Category**

<table>
<thead>
<tr>
<th>Category</th>
<th>Monthly Search Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticker Symbol Performance</td>
<td>23.6M</td>
</tr>
<tr>
<td>Investing</td>
<td>5.8M</td>
</tr>
<tr>
<td>Retirement Planning</td>
<td>1.3M</td>
</tr>
<tr>
<td>Credit, Lending and Financing</td>
<td>0.9M</td>
</tr>
<tr>
<td>Personal Finance</td>
<td>0.9M</td>
</tr>
<tr>
<td>Taxes and Other</td>
<td>0.7M</td>
</tr>
<tr>
<td>Trust, Custody and Estate</td>
<td>0.6M</td>
</tr>
<tr>
<td>Financial Advisor</td>
<td>0.4M</td>
</tr>
<tr>
<td>Charity</td>
<td>0.2M</td>
</tr>
<tr>
<td>Private Banking</td>
<td>0.0M</td>
</tr>
</tbody>
</table>

n = top 15 keywords across 10 categories on desktop

Source: Gartner analysis of SEMrush data

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**EXCERPT**

**INSIGHT REPORT: WEALTH & ASSET MANAGEMENT: OPTIMIZING CONTENT FOR SEARCH**

The Full Report is Available to Gartner Clients Only.

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