YARDSTICK

2026 ADVISER AND PLANNER WEBSITE SURVEY

Benchmark your site against your peers, competitors and what works

We reviewed 500 UK adviser and planner websites during May and June 2026. Here are six findings that reveal where firms are getting it right and where many can improve.

500 WEBSITES REVIEWED

WHY THIS MATTERS

80%

of a prospect's buying decision is made before they meet you

88%

of consumers will not return to a website if they have a poor experience

75%

of prospects will visit an adviser/planner's website before making contact

#1. PUT REAL PEOPLE AT THE HEART OF THE HOMEPAGE

Great websites show both the guide and the hero: the people providing advice and the clients whose lives they improve.

49%

featured pictures of the team on their homepage

ONLY 19.4%

included a meet-the-team section on their homepage

JUST 12.8%

featured clients on their homepage

Most firms don't prominently showcase their teams or clients on their homepage. Those that do make their websites feel more human, relatable and distinctive.

#2. FEE TRANSPARENCY IS STILL AN OPPORTUNITY

Research shows consumers increasingly expect to understand fees before they make contact, but most firms still do not fully disclose them online.

40.60%

of firms fully disclosed their fees

this falls to

21.43%

When St. James's Place partner websites were excluded

Publishing fees is a choice, not a rule. However, firms that do it well can meet consumer expectations, stand out from the crowd and improve enquiry quality.

#3. A TEAM PAGE IS ONLY THE STARTING POINT

Prospects want to know who they'll be working with. A grid of names and headshots, or worse, no team information at all, doesn't help them make that connection.

A strong team section with individual profiles builds familiarity, trust and likeability, helping prospects form an early connection with the people they'll be working with.

77.60%

had a meet-the-team page

but only

28.09%

had a dedicated page for each team member

#4. DON'T JUST MAKE CLAIMS, SHOW THE PROOF

Social proof, including reviews, testimonial videos and survey results, helps prospects understand the value you provide through the experiences of people like them.

JUST 13%

of firms had client testimonial videos

ONLY 17.6%

embedded Google reviews on their website

ONLY 18%

embedded VouchedFor reviews

62.22%

of firms displaying VouchedFor reviews linked visitors away from their site rather than using the widget to display reviews

Using a range of social proof throughout your website shows prospects the value of working with you, helping to increase enquiry numbers and improve quality.

#5. TRUST DEPENDS ON GETTING THE BASICS RIGHT

Most firms included the correct regulatory statement, but statutory information was more frequently missed.

97%

included the correct regulatory statement

21.20%

did not include all the required statutory information, such as their registered office address, place of registration and company number

These details may feel routine, but missing them from your site can undermine confidence and create avoidable compliance risks.

#6. AN OUT-OF-DATE BLOG SENDS THE WRONG SIGNAL

A blog demonstrates your expertise and keeps your website useful, but only when visitors can see it is regularly updated.

77.8%

had a blog or news page

of the websites with a blog or news page

23.14%

had not been updated since 2025

If your blog is visible, keep it current. A neglected page can create doubt, making an otherwise active firm appear inactive or behind the times.

HOW DOES YOUR WEBSITE COMPARE?

The strongest adviser and planner websites showcase their teams and clients, provide fee transparency, use compelling social proof, include the correct compliance information and stay up to date. Our research shows that most firms have opportunities to improve in at least one of those areas.

If you'd like help creating a truly impressive website, email hi@theyardstickagency.co.uk or call 0115 8965 300 to arrange a meeting.

METHODOLOGY AND CONTEXT

We reviewed 500 UK adviser and planner websites during May and June 2026. In previous years, we selected 20 websites in each of 25 locations using the MoneyHelper directory. After that directory closed, we retained the same postcode list for 2026 and selected the first 20 relevant adviser or planner websites returned by Google for each location.

The revised method changed the makeup of the sample, including 122 St. James's Place partner practice websites, equal to 24.4% of the total. This is important context because these websites often follow similar structures, content and compliance requirements.