

Healthcare AI Visibility Report 2026

AI is already shaping patient choice.
Is your brand is part of those answers?



Contents

Introduction	03
Methodology	04
Findings: What separates AI leaders from everyone else	06
Breadth of patient-facing content	07
Clear clinical authority signals	08
National or networked footprint	09
The power of reviews	10
Technical clarity and structure	11
Specialty by specialty: leaders, laggards and the gap between them	12
Paediatrics	13
Ophthalmology	14
Orthopaedics	15
Diagnostics and screening	16
Multidisciplinary	17
Cosmetic surgery	18
Fertility	19
Oncology	20
Cardiology	21
Mental health & addiction	22
Why AI visibility is not the whole story	23
How healthcare brands can close the AI visibility gap	24
Networked vs local / independent hospital deep dive	26
AI visibility score leaderboard	29



Introduction

Patients are already bringing AI into their health decisions. Recent polling suggests that around one in six adults use AI chatbots at least once a month to find health information and advice, rising to a quarter of adults under 30. Other surveys report that roughly a third of consumers have used generative AI for a health reason at least once. In UK primary care research, about 9% of patients are already turning to AI for healthcare guidance alongside their contact with services (not to mention, clinicians themselves turning to AI more and more frequently to support clinical decision making).

This behaviour is not limited to minor queries. Patients ask AI tools about symptoms, likely diagnoses, treatment options, timings, and where to go. For many, the first set of answers now arrives in an AI chat window rather than a browser results page or a GP surgery.

In that context, AI visibility becomes a new source of demand for private healthcare brands. When a patient asks about heavy periods, joint pain, or hearing loss, the provider who appears most often in AI recommendations gains an extra route for awareness and enquiry. The provider that rarely appears risks being absent from an entire class of patient journeys.

To understand how this plays out in the UK, we analysed AI visibility for 100+ healthcare brands across key specialties, using a methodology that tests how often and how strongly each provider appears in answers from large AI tools. We focus on private and independent-sector providers where patients can exercise choice.

The aim of this report is not to judge clinical quality. We look at which providers' current AI tools are most likely to surface when patients go looking for answers, and we explain the patterns that sit behind those results. That means highlighting both the brands that are already highly visible in AI, and more importantly, the levers other providers can use to change their position.

Methodology

Our AI visibility metric is built on direct testing across leading large language model (LLM) interfaces currently shaping patient search behaviour in the UK. We evaluated brand visibility across:

ChatGPT (OpenAI)

Google AI Mode

Microsoft Copilot

These platforms were selected because they represent the most widely used consumer-facing AI systems for health-related queries and recommendations.

For each platform, we issued a consistent set of patient-style prompts covering the full journey, from early symptom exploration through to treatment comparison and provider selection. Prompts were written to reflect natural patient language rather than SEO-style keywords.

For every prompt, we recorded:

Which UK healthcare brands were mentioned in the response

Whether the brand was referenced neutrally, comparatively, or as a recommended next step

Whether the mention was clearly connected to an action, such as contacting a provider or seeking a consultation

Across the full prompt set, this produces a raw mention count showing how often each brand appears in AI-generated answers.

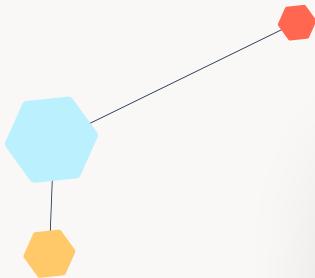
We then measured breadth. For each brand, we counted the number of distinct patient topics where it appeared, spanning awareness, consideration, and decision-stage queries. This avoids overvaluing brands that appear repeatedly for a narrow set of prompts while missing broader patient needs.

Finally, we benchmarked performance at a market level. Each brand's mention rate and topic coverage were compared against the wider UK provider landscape to generate a normalised visibility score on a 0–100 scale. The combined score reflects:

- **Frequency of appearance**
- **Breadth of patient topics covered**
- **Share of all AI mentions relative to competitors**

The result is a comparative AI visibility score designed to show not just whether a brand appears in AI answers, but how consistently and meaningfully it shows up across real patient questions.





How this differs from traditional SEO

Traditional SEO behaves very differently. In a traditional results page, a patient sees many blue links and may spread their attention across a mix of clinic sites, comparison tools, publishers, and directories. In AI answers, a patient often receives a short narrative response with at most a few named providers, and in some cases none at all. This creates a pattern that feels far closer to winner takes most than to the familiar long list of options that provide patients with choice.

One way to picture this is to think about the difference between a library and a concierge desk. Search results work like shelves in a large reading room, where every book has space as long as it meets a basic relevance test. AI answers behave more like a concierge who listens to the question and names one or two providers that fit, sometimes with a sentence on why they might suit the patient. For a query such as “private knee replacement in Manchester”, a search page might show ten or more links, while an AI assistant may only bring forward two or three local providers in the body of the answer

Google best orthopaedic clinic in london

Fortius Clinic
https://www.fortiusclinic.com

Best Orthopaedic & Sports Medicine Clinic in London - Fortius
Fortius Clinic is the largest Private Orthopaedic Treatment Centre in London, Specialising in orthopedic surgery, Sports Medicine & Sports injury.

The London Orthopaedic Clinic
The London Orthopaedic Clinic
We provide musculoskeletal diagnostic services and surgical and non-surgical treatments that are tailored to the individual needs of our patients.

People also ask

What is the best hospital for orthopedics?

Who is the top orthopedic surgeon in the UK?

What is the hardest orthopedic surgery to recover from?

How much is a private orthopedic consultation in the UK?

[Feedback](#)

Royal National Orthopaedic Hospital
https://www.moh.nhs.uk

Royal National Orthopaedic Hospital: Home
The Royal National Orthopaedic Hospital NHS Trust aims to be a world-leading orthopaedic hospital with the best patient care and staff experience in the NHS.

Top Doctors UK
https://www.topdoctors.co.uk › orthopaedic-surgery

Orthopaedic Surgeons in London
Book an appointment with the best Orthopaedic Surgeons in London according to Top Doctors. Read genuine patient reviews and choose an online consultation.

London Sports Orthopaedics
https://sportsoftho.co.uk

London Sports Orthopaedics
London Sports Orthopaedics is a partnership of Specialist Consultants based in Central London, covering all orthopaedic, trauma, sports injury and rheumatology ... [Read more](#)

South West London Elective Orthopaedic Centre | SWLEOC
https://www.eoc.nhs.uk

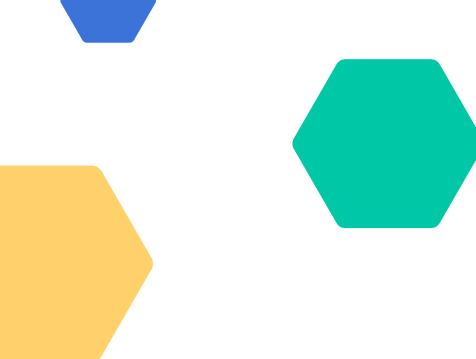
Home - South West London Elective Orthopaedic Centre ...
Today, SWLEOC is recognised as the largest joint replacement centre in the UK and one of the largest in Europe, performing around 6,300 procedures annually of ... [Read more](#)

Cromwell Hospital
https://www.cromwellhospital.com › services-specialties

Specialist Orthopaedic Care in London
World class orthopaedic care & treatment for patients with conditions affecting their joints, bones, ligaments, tendons, muscles and nerves. Find out more.

OneWelbeck
https://onewelbeck.com › orthopaedics

Private Orthopaedics Clinic London
Treat general pain and sports injuries at our private orthopaedic clinic. We have over 30 specialists across nine branches of orthopaedics on hand to help ...



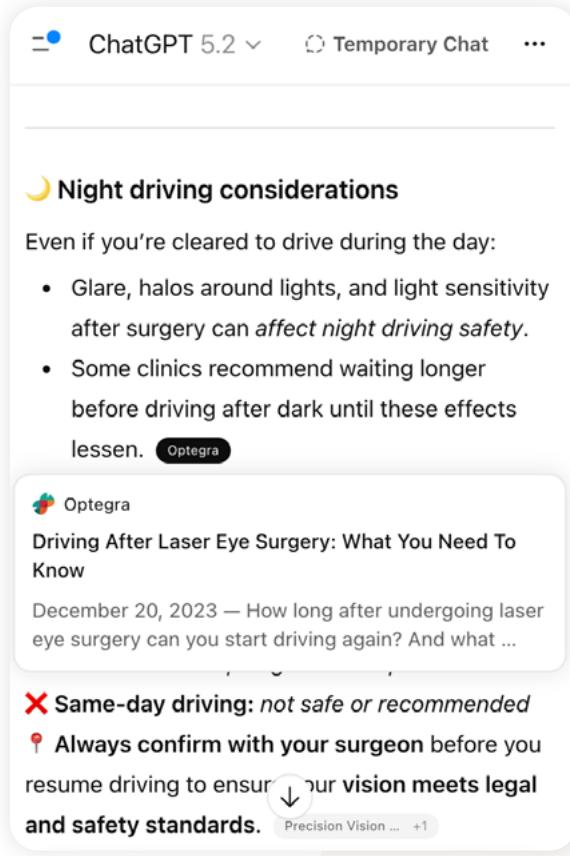
Findings: What separates AI leaders from everyone else

Across the 100+ brands in this study, a small group appears in AI answers far more often than the rest. These leaders share five traits that shape how patients encounter them in AI tools.

- ↗ **Breadth of patient-facing content**
- ↗ **Clear clinical authority signals**
- ↗ **National or networked footprint**
- ↗ **The power of reviews**
- ↗ **Technical clarity and structure**



Breadth of patient-facing content



ChatGPT 5.2 ▾ Temporary Chat ...

Night driving considerations

Even if you're cleared to drive during the day:

- Glare, halos around lights, and light sensitivity after surgery can *affect night driving safety*.
- Some clinics recommend waiting longer before driving after dark until these effects lessen.

 Optegra

Driving After Laser Eye Surgery: What You Need To Know

December 20, 2023 — How long after undergoing laser eye surgery can you start driving again? And what ...

Same-day driving: not safe or recommended

• Always confirm with your surgeon before you resume driving to ensure your vision meets legal and safety standards.

Precision Vision ... +1

AI platforms favour organisations that support patients along the full journey from first symptom to follow-up. Leaders go beyond simple service lists and explain conditions, options and next steps in clear language that mirrors how people actually ask for help.

High-visibility brands join these answers into simple, signposted patient journeys. A visitor can move from understanding symptoms, to seeing likely tests and treatments, to learning what will happen at their chosen clinic and what to expect afterwards. Patient stories, FAQs, checklists and preparation guides sit alongside service pages, so AI has multiple concrete passages it can cite when selecting examples.

The wider and more complete this patient-facing library becomes, the more chances AI tools have to match a query to that provider. In practice, leaders appear not only for their own brand terms but also when patients ask general questions about symptoms, procedures and recovery in their specialty.

“what is a colposcopy”, “how long does recovery take after knee replacement”, “is tinnitus serious”.

“is IVF right for me”, “alternatives to grommets”, “private vs NHS cataract surgery”.

“how to prepare for an MRI”, “what happens on the day of surgery”, “who can I bring with me”.

Clear clinical authority signals

AI platforms appear to favour information that shows itself to be clinically grounded and accountable. Brands with strong visibility treat every patient page as a clinical resource as well as a marketing asset. Content is written or checked by named clinicians, and the site explains who those clinicians are, what they do, and how content is governed.

These patterns send signals that resemble the experience, expertise, authoritativeness and trustworthiness (EEAT) criteria familiar from search quality work. In our sample, AI tools consistently draw on pages that combine clear clinical ownership with visible review dates, while content without authorship or governance markers is less likely to be used as a primary example in answers.

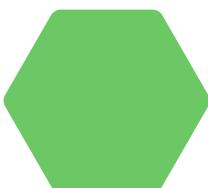
High scoring brands tend to

Use clinician bylines such as “Written by Dr Sarah Jones, Consultant Gynaecologist” with a short bio or a link to the clinician’s profile.

Add clear medical review notes such as “Clinically reviewed by Mr John Patel, Consultant Orthopaedic Surgeon. Last reviewed: April 2025”.

Explain roles and qualifications in plain language, including registration details where relevant.

Show when a page was last reviewed and how often content is updated in that specialty.



National or networked footprint

Brands that operate as networks tend to appear more often in AI answers. In our dataset, high-visibility providers are more likely to run multiple sites or serve as regional or national referral centres. Their names surface in many local and national contexts, so AI tools encounter them repeatedly when scanning the web.

This creates a kind of network effect. When an assistant answers a question about paediatric surgery or cataract care, it often finds the same few providers echoed across guidance pages, academic content and media articles. Paediatric and ophthalmology networks benefit strongly from this pattern, while some highly regarded single-site clinics (e.g. London) appear far less often in AI answers because they are mentioned in fewer external sources.

In classic search, geography can limit many patients to a narrow local shortlist. In AI answers, location still matters, yet national reach and connectedness change the odds. Providers that look big, integrated and frequently cited gain an advantage, even when they are not the closest option in physical distance

Run clinics or hospitals across several regions, or act as recognised centres for specific procedures at national level

Are named by NHS pages, specialist charities, royal colleges, universities and national news outlets

Receive links and references from a wide set of credible third parties that are embedded in the wider system of care

The power of reviews

AI assistants pay close attention to off-site reputation and citations - they look at how a brand appears beyond its own website. The easiest place to showcase real, trustworthy opinions of your brand or service is through reviews. In our dataset, providers that feature most often in answers are generating consistent, high quality and highly detailed reviews across a number of platforms:

These platforms include:

Google Reviews (particularly prominent in Google's AI Mode and Gemini)

Doctify

Trustpilot

I Want Great Care

Top Doctor

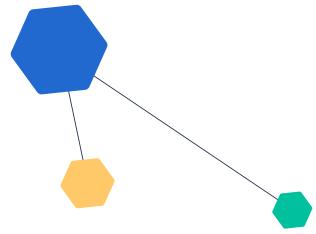
It's not just reviews either, top providers appear in news articles that quote clinicians or report service changes, charity partnership pages and joint campaigns, research outputs and summaries that list sites as study or trial centres, patient forums, review platforms and comparison tools where people share experiences, direct clinician links to group hospitals. Many privately practising consultants link from their own sites to the hospitals where they work, so the group provider gains hundreds of highly relevant clinical backlinks from individual practitioner pages.

Each review acts like another clue that links a brand to a condition, pathway or region, or showcases the quality of their service. When an assistant scans the web for examples, it can join the dots more easily when the same provider appears across news, charities, research bodies and patient communities. Providers with little off-site presence, no reviews or with names that are shared across unrelated organisations, give AI far less evidence to work with.

High-visibility brands in our sample tend to build workflows that naturally create these reviews and relationships that build the mentions. They collaborate with charities, contribute to research groups and registries, encourage patients to leave detailed public reviews, and keep information current on comparison sites and directories. These activities sit outside classic SEO work, yet they strongly influence how confidently AI tools connect a brand to a clinical topic.



Technical clarity and structure



AI leaders usually run sites that are easy for both patients and machines to read, and fast to use. Core pages sit in a clean architecture grouped by conditions, treatments and locations. Each service has its own page with descriptive headings, consistent URLs and simple navigation, instead of being hidden inside PDF brochures or long lists in a single catch all page.

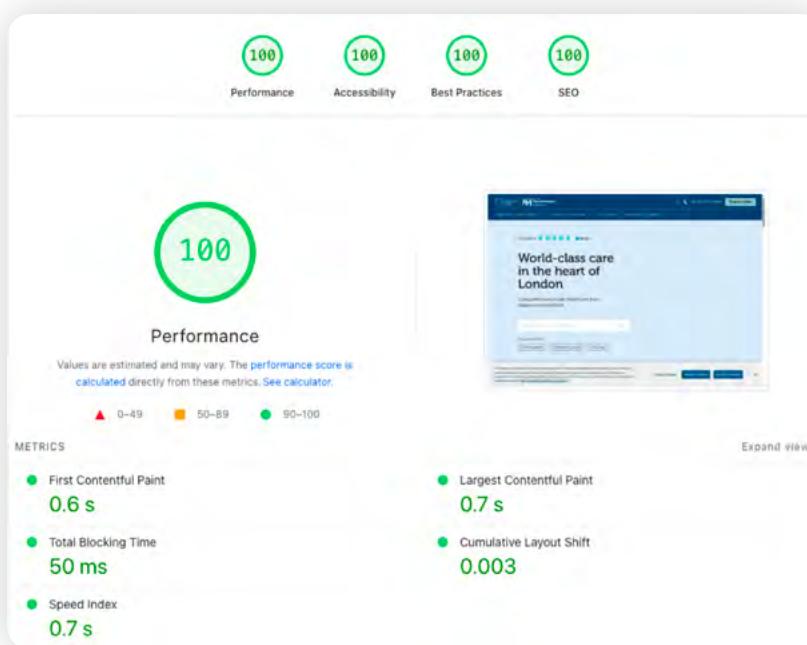
These sites also load quickly and behave predictably. Pages render key content early, avoid layout shifts, and respond promptly to user input. This supports Core Web Vitals and reduces friction for patients who are anxious, on mobile, or comparing options.

Internal links trace the same steps that a patient would take in real life. Symptom pages link to likely investigations and treatments, treatment pages link to locations and clinicians, and all of them link back to clear summaries of the organisation and how to book. Structured data is applied in a focused way to label organisations, locations, medical services, FAQs and reviews, so AI tools can see how content fits together.

This clarity helps when assistants answer questions. It becomes easier for an AI system to see what the organisation does, where it operates and which pages best respond to a specific patient query, so the tool can name the provider with confidence.

In our data, AI leaders tend to have a digital footprint that makes it easier for AI systems to interpret who they are, what they do and where they fit.

For digital teams, this points towards sites built with clean, semantic HTML and lean page templates. Headings, paragraphs, lists and tables carry the meaning, while styling sits on top. Fewer heavy scripts and cleaner markup can also help pages load faster and stay stable, which supports both Core Web Vitals and readability for AI agents.



Example of Core Web Vital scores Providers should be looking to achieve



Specialty by specialty: leaders, laggards and the gap between them

Across specialties, AI visibility tends to cluster. A small number of brands take a large share of mentions, and then scores fall away fast.

The sections below show the same pattern in four categories. Each one sets out a simple distribution, then the main differences between higher visibility brands and lower visibility providers, linked back to the five traits in section 3.

Click here for your specialty specific AI visibility playbook

- ↗ **Paediatrics**
- ↗ **Ophthalmology**
- ↗ **Orthopaedics**
- ↗ **Diagnostics and screening**
- ↗ **Multidisciplinary**
- ↗ **Cosmetic surgery**
- ↗ **Fertility**
- ↗ **Oncology**
- ↗ **Cardiology**
- ↗ **Mental health & addiction**

Paediatrics

Paediatrics contains multiple national and regional centres with high AI visibility. The leading brands tend to cover a wide set of informational topics, not only service pages.

Distribution

Top

94 . 5

Median

48 . 9

Bottom

19 . 0

Leaders publish large volumes of condition and pathway content, written for patients and carers. Laggards rely on a small set of procedure or department pages with limited supporting material. This maps to the content trait in section 3.

Leaders show strong off site signals. They attract more third party citations and references that AI systems can repeat. Laggards have fewer credible mentions outside their own site. This maps to the citations trait in section 3.

Leaders also make clinical authority easy to verify. Clinician profiles, governance cues, and clear ownership of content are more visible. Laggards often have the same elements, but they are thinner or harder to find. This maps to the authority trait in section 3.



Ophthalmology

Ophthalmology shows strong visibility from national consumer brands and specialist hospitals. Many have run patient facing campaigns for years, which often correlates with richer supporting content.

Distribution

Top

86.0

Median

48.0

Bottom

18.0

Ophthalmology shows a clear gap between the top and the bottom. The top score sits well above the middle of the category.

This category behaves more like consumer health in the way questions are asked. Higher visibility providers answer pre decision questions in consistent language across pages, which makes their information easier to reuse in AI answers. This maps to the technical trait in section 3.

Lower visibility providers often keep content at the level of a service menu. Higher visibility providers shape the journey with clear explanations of who a service is for and what the steps look like. This maps to the content trait in section 3.

Third party visibility is a bigger separator here than in some other specialties. Higher visibility brands are mentioned in a wider set of external sources. This maps to the citations trait in section 3.



Orthopaedics

Orthopaedics shows one or two standout brands, followed by a steep drop into the lower rankings.

Distribution

Top

80.0

Median

34.0

Bottom

21.0

Orthopaedics rewards clarity on trade offs. Higher visibility providers publish content that helps patients compare options and understand recovery. Lower visibility providers keep pages narrower and more procedural. This maps to the content trait in section 3.

Local presence alone does not close the gap. Providers that look connected across a wider network tend to show stronger visibility than single site providers with similar service lists. This maps to the footprint trait in section 3.

External references that name the provider alongside the procedure area help AI systems anchor a recommendation. Higher visibility brands attract more of these references. This maps to the citations trait in section 3.



Diagnostics and screening

Diagnostics and screening shows a similar split. A small group of national players sits at the top, while many clinics remain at low visibility.

Distribution

Top

70.0

Median

42.0

Bottom

4.0

The category is driven by explanations of meaning, not only access. Higher visibility providers explain why a test is used, what the result means, and what happens next. Lower visibility providers focus more on booking and short descriptions. This maps to the content trait in section 3.

Trust cues work differently here. Patients look for signals that results are reliable and properly overseen. Higher visibility brands make oversight easier to understand, which supports reuse in AI answers. This maps to the authority trait in section 3.

Low visibility often links to weak external confirmation. Higher visibility providers appear more often in third party sources tied to diagnostics and screening. This maps to the citations trait in section 3.



Multidisciplinary

Multidisciplinary has the widest spread in the benchmark. A small number of national groups sits far above the rest, then scores fall fast.

Distribution

Top

100

Median

46.0

Bottom

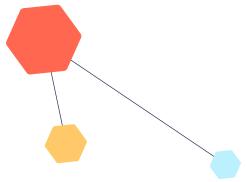
1.5

This category rewards coherence across many services and locations. Higher visibility groups present one joined up set of answers that works across the whole network. This maps to the footprint trait in section 3.

Lower visibility providers often look like a collection of separate pages, with no clear route from a symptom or condition to a service, a clinician, and a next step. Higher visibility groups make those routes easier to follow. This maps to the technical trait in section 3.

Group level reputation plays a bigger role here than in single service categories. Higher visibility providers appear more often in third party sources that talk about the group, not only one hospital. This maps to the citations trait in section 3.





Cosmetic surgery

Cosmetic surgery shows a clear gap between the strongest brands and the long tail. Scores drop from the top into low visibility quickly.

Distribution

Top

73.2

Median

41.2

Bottom

4.0

This category is shaped by expectation setting. Higher visibility providers answer pre decision questions and explain recovery. Lower visibility providers keep content closer to short procedure pages. This maps to the content trait in section 3.

Lower visibility providers often struggle to look credible at a glance in AI answers because their trust cues are harder to confirm. Higher visibility brands present clinical responsibility more clearly across the site. This maps to the authority trait in section 3.

Third party reputation is a major separator. Higher visibility brands attract more external mentions that AI systems can reuse. This maps to the citations trait in section 3.



Fertility

Fertility includes a small group of high visibility providers, then a steep drop to low scores.

Distribution

Top

73.2

Median

42.5

Bottom

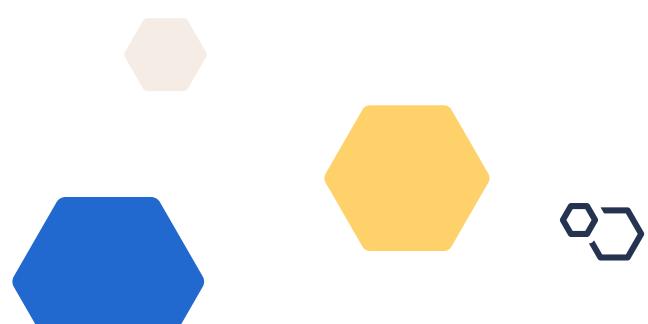
4.0

The winners explain the journey. They publish pages that set out steps, decision points, and what happens next. Lower visibility providers publish fewer pages that answer common questions in a way that supports comparison. This maps to the content trait in section 3.

Consistency also matters because fertility sites tend to have many interlinked topics. Higher visibility providers present information in more consistent formats, which supports reuse in AI answers.

This maps to the technical trait in section 3.

External credibility separates the top from the bottom. Higher visibility brands are mentioned more often outside their own site. This maps to the citations trait in section 3.



Oncology

Patients often search to understand options and process before they contact a provider. Higher visibility brands publish more condition and pathway content that supports early research.

Distribution

Top

77.1

Median

44.9

Bottom

6.0

Lower visibility brands lean on a smaller set of treatment pages. This maps to the content trait in section 3.

Oncology also carries a higher burden of credibility. Higher visibility providers make clinical ownership clearer across pages, which makes their information easier to cite. This maps to the authority trait in section 3.

Third party reputation plays a large role in this category. Higher visibility brands appear more often in external sources that AI systems can reuse. This maps to the citations trait in section 3.



Cardiology

The category contains more urgency and risk based searching. Higher visibility providers cover symptom led questions and pathway steps in a structured way.

Distribution

Top

77.9

Median

35.8

Bottom

5.0

Lower visibility providers are more service led. This maps to the content trait in section 3.

Clear signposting matters because cardiology pages often need patients to understand next steps. Higher visibility providers make page structure and internal routes clearer, which helps AI systems extract stable answers. This maps to the technical trait in section 3.

Higher visibility brands are also referenced more often outside their own sites in ways that connect them to cardiology care. This maps to the citations trait in section 3.

Mental health & addiction

Mental health and addiction has a higher floor than many categories, but there is still a clear gap between leaders and the rest.

Distribution

Top

69.2

Median

39.7

Bottom

16.8

The spread is shaped by how clearly providers explain support and next steps. Higher visibility brands publish more structured pages that explain conditions, options, and what happens next. This maps to the content trait in section 3.

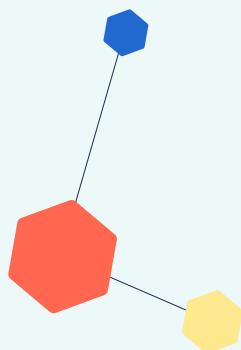
The category also rewards clarity and structure, because patients search in varied ways across symptoms, therapies, and practical access questions. Higher visibility providers organise information in a way that is easier for AI systems to reuse. This maps to the technical trait in section 3.

Off site reputation still separates the top tier. Higher visibility providers are mentioned more often in third party sources that AI systems can reuse. This maps to the citations trait in section 3.



Why AI visibility is not the whole story

AI visibility is useful, but it has limits. Three caveats matter when you interpret the scores.



Not all searches are equal

Many AI answers sit at the early research stage. Examples include “What is cataract surgery?” and “How long does recovery take?”.

While these queries can build awareness and trust, they do not map neatly to revenue.

Local recommendation prompts are harder to benchmark

Some of the highest intent questions are personalised and location specific, such as “Who should I choose for hip surgery in Manchester?”. They are harder to aggregate into a single benchmark.

Being absent from broad answers does not by itself prove you are not recommended in local prompts. It is still a concern because it suggests a weaker base of content and citations for AI systems to draw on.

AI visibility is a leading indicator

AI visibility shows how often your brand appears while patients learn and compare options. It does not show how well that attention turns into enquiries and booked procedures.

This is why AI visibility needs to sit alongside conversion work. The goal is presence in answers and progress into the consideration shortlist.

How healthcare brands can close the AI visibility gap

Use the Medico AI readiness checker to turn AI visibility into a practical worklist.

How to use the readiness checker (next page):

Score each row from 0 to 2. A score of 0 means the signal is missing, 1 means it exists but is weak or inconsistent, and 2 means it is present and clear. Add up your total score. Then compare it with the AI readiness curve below to see where you sit.

What does your score mean?

Total possible score: **26 points**.

0 to 8 points: not ready

Most supporting signals are missing. Focus on patient facing content and clinical authority signals first, then technical clarity and structure.

9 to 16 points: limited readiness

Some foundations exist, but they are uneven. Prioritise consistent templates, clearer clinical ownership, and a wider set of patient question pages.

17 to 22 points: ready

Most building blocks are in place. Focus on expanding topic coverage within priority specialties and improving offsite reputation and citations.

23 to 26 points: strong readiness

Signals are clear across the board. Focus on maintaining quality, filling remaining topic gaps, and monitoring by specialty and condition.

A lower score is common. It usually reflects priorities and resourcing, not the standard of care. The checker is designed to show where to focus first, using a small set of observable signals that can be improved in stages.



Use the trait mapping column to group your gaps. Start with the traits where you scored lowest, since these are the constraints most likely to limit mention rates in AI answers.



AI leader trait		1-2	0	Score (0-2)
Breadth of patient-facing content	Topic coverage	Publish condition and pathway pages that match your priority specialties. Keep a consistent set of topics across the site.	Rely on a short set of service or procedure pages only.	
	Patient question pages	Write pages that answer common patient questions in plain English, including recovery, risks, and what happens next.	Hide key questions inside long pages that never answer them clearly.	
	Balance of information	Present risks, side effects, and alternatives alongside benefits.	Remove risk content or minimise it to a footnote.	
	Clinical authorship	Add named clinician bylines with credentials. Add medical review notes and a last reviewed date.	Use anonymous “team” authorship with no review trail.	
	Regulation and accreditation	State your regulator status and relevant registrations where applicable. Keep it easy to find.	Make vague claims like “fully accredited” with no details.	
	Evidence and outcomes	Publish outcomes where you can, explain what they cover, and cite credible sources where relevant.	Make broad claims like “leading” with no evidence.	
Clear clinical authority signals	Transparency	Give clear information on pricing ranges where possible, eligibility, limits, and what is included.	Bury costs and constraints, or only present positives.	
	Location and service scope	Make location scope explicit, including where care happens and who it serves.	Create thin local pages that repeat the same copy with a city name swap.	
	Page structure and markup	Use structured data where it fits the page type. Keep headings, labels, and key facts consistent across templates.	Mix formats across pages so the same facts appear in different places each time.	
	Internal linking	Link condition pages to relevant services, clinicians, and next steps. Keep navigation predictable.	Leave high value pages isolated with no clear route from topic to action.	
National or networked footprint	Site quality and accessibility	Keep pages fast, secure, mobile friendly, and easy to use. Fix broken links and outdated pages.	Allow broken journeys and missing information on key pages.	
	External citations	Build credible third party mentions through partnerships, research outputs, charities, and PR that names your organisation.	Depend on self published claims as your main proof.	
	Reviews and reputation	Encourage authentic independent reviews and respond to themes in feedback.	Cherry pick testimonials with no verification cues.	
Offsite reputation and citations				

Networked vs local / independent hospital deep dive

Two very different providers in this study show how AI referrals behave in practice: a large national private hospital group and a major independent London hospital. Both are seeing rapid growth from AI, yet their size and reliance on organic search shape the numbers in very different ways.

National network: tiny percentages, huge numbers

For the national group, ChatGPT traffic looks almost invisible in percentage terms and very real in absolute terms. Over the last 90 days, visits from ChatGPT rose from 9 to 3,614 year on year, roughly a 400X increase. ChatGPT accounts for only 0.38% of new users, yet that still equates to thousands of patients whose journey now includes an AI recommendation.

These visitors act with intent. Around 10% of ChatGPT users complete a key event such as an enquiry or booking. At the same time, organic search has softened: conversions from organic are down 11% year on year, and new organic users are down 5%. For a group of this scale, even a “sub-1%” AI share already represents a material new flow of AI-touched patients.



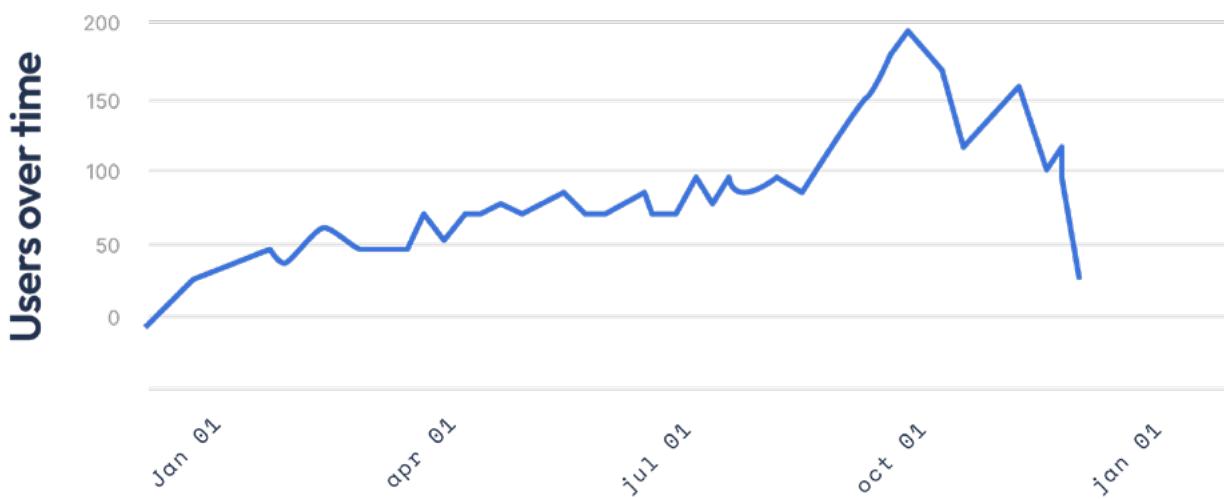
Local London hospital: high AI conversion, heavy organic hit

The independent London hospital tells a more exposed story. ChatGPT users grew from 70 (Q4 2024) to 1000 (Q4 2025), around 14X more than the same period a year ago. ChatGPT now accounts for 1.52% of new users, a larger share than the national group, and these visitors are highly engaged, with a conversion rate of 16.8%.

At the same time, for the local hospital organic search has stepped back more sharply. Year on year, organic search conversions are down 25%, the organic conversion rate is down 4%, and new organic users are down 23.5%. AI referrals are growing fast and convert strongly for this hospital, yet the uplift has not filled the gap left by a quarter of lost organic enquiries. For independents that lean heavily on organic visibility, this mix creates both an opportunity and a clear exposure.

AI behaves more like a referral partner than another search platform

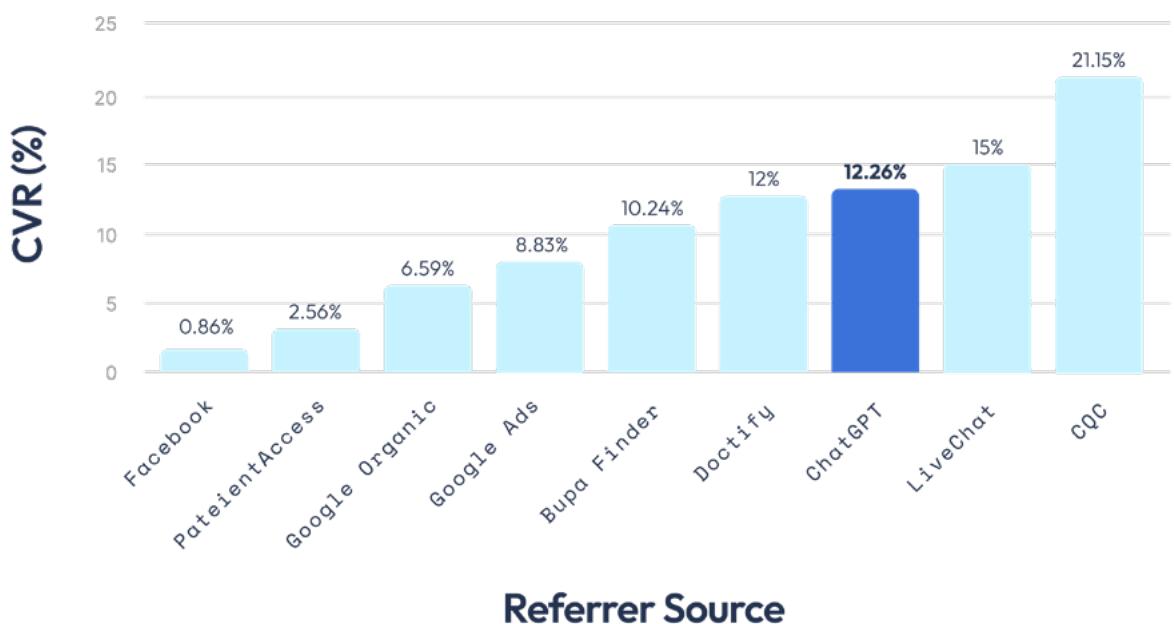
Across the multidisciplinary hospitals in the study, the pattern of conversion rates places ChatGPT closer to referral partners than to generic search platforms. Average conversion rates over 2025's Q4e:



chatgpt.com/referral



Referrer Source / CVR (%)



AI visitors act more like patients arriving from Bupa or Doctify than users arriving from a broad search term. Combine AI traffic's referrer level conversion rate, with its rapid growth, and you get the most important traffic source the healthcare industry has ever seen.

It's also worth noting that this may only be a small part of the overall story. Many people see a recommendation in an AI platform, then follow up via branded organic searches or direct visits, so AI influence often sits hidden inside other channels.

For national groups, a 0.38% ChatGPT share already represents thousands of additional high-intent users. For independents that live off organic search, leaving AI visibility to chance is becoming a growing commercial risk.



AI visibility score leaderboard

Provider	Primary Specialty	URL	Area	Medico visibility score
Wimpole Aesthetics	Aesthetics & wellness	https://wimpoleaesthetics.co.uk/	London	61.3
Autism Clinic London	Autism assessments (neurodevelopment)	https://autismcliniclondon.com/	London	51
London Heart Clinic	Cardiology	https://www.londonheart.clinic	London	5
One Heart Clinic	Cardiology	https://www.oneheartclinic.com	London	26
Regents Park Healthcare	Cardiology	https://www.regentsparkhealthcare.com	UK wide	26
Royal Brompton & Harefield Hospitals Specialist Care	Cardiology	https://www.rbhh-specialistcare.co.uk	London	26
Liverpool Heart and Chest Hospital Private Patients	Cardiology	https://www.lhch.nhs.uk/the-rowan-suite	Liverpool North West England	45.5
Royal Papworth Private Care	Cardiology	https://royalpapworth.nhs.uk/private-care	Cambridge East of England	54.6
The Harley Street Heart Centre	Cardiology	https://harleystreet.sg/heart	Singapore	54.6
Barts Heart Centre	Cardiology	https://www.bartshealth.nhs.uk/barts-heart-centre	London	77.9
London Bridge Plastic Surgery & Aesthetic Clinic	Cosmetic surgery	https://www.lbps.co.uk	London	4
The Plastic Surgery Group	Cosmetic surgery	https://www.theplasticsurgerygroup.co.uk	London	23
Centre for Surgery	Cosmetic surgery	https://centreforsurgery.com	London	28.6
Harley Medical Group	Cosmetic surgery	https://www.harleymedical.co.uk	UK wide	36.2
Transform Hospital Group	Cosmetic surgery	https://www.transforminglives.co.uk	UK wide	36.2
The Cosmetic Skin Clinic	Cosmetic surgery	https://www.cosmeticskinclinic.com	London and Buckinghamshire	46.1
The Private Clinic of Harley Street	Cosmetic surgery	https://www.theprivateclinic.co.uk	UK wide	50.9
Bella Vou	Cosmetic surgery	https://www.bellavou.co.uk	Tunbridge Wells South East England	56.5
MYA Cosmetic Surgery	Cosmetic surgery	https://www.myacosmetic.co.uk	UK wide	62.8
Cadogan Clinic	Cosmetic surgery	https://www.cadoganclinic.com	London	73.2
The Devonshire Clinic	Dermatology (skin)	https://thedevonshireclinic.co.uk/	London	31.8
The Harley Street Dermatology Clinic	Dermatology (skin)	https://theharleystreetdermatologyclinic.co.uk/	London	53.4
UME Health	Diagnostics & outpatient imaging centre	https://umehealth.co.uk/	London	57.3
London Imaging Centre	Diagnostics & screening	https://www.londonimaging.co.uk	London	4
Affidea	Diagnostics & screening	https://www.affidea.com	Europe wide including UK	21
Alliance Medical	Diagnostics & screening	https://www.alliancemedical.co.uk	UK wide	21
Neko Health	Diagnostics & screening	https://www.nekohealth.com	London and Manchester UK	27.8
InHealth	Diagnostics & screening	https://www.inhealthgroup.com	UK wide	39
Medical Imaging Partnership	Diagnostics & screening	https://medicalimaging.org.uk	South East England (Sussex & Kent)	43.7
LycaHealth	Diagnostics & screening	https://www.lycahealth.com	London and South East England	50.9
Preventicum	Diagnostics & screening	https://www.preventicum.co.uk	London	59.7

Provider	Primary Specialty	URL	Area	Medico visibility score
Randox Health	Diagnostics & screening	https://www.randoxhealth.com	UK and Ireland	65.2
Ultrasound Direct	Diagnostics & screening	https://www.ultrasound-direct.com	UK wide	70
Fresenius Medical Clinic	Dialysis & nephrology	https://www.freseniusmedicalcare.com	International	61.3
The Harley Street ENT Clinic	ENT (ear, nose & throat)	https://www.harleystreetent.com/	London	63.7
The Lister Fertility Clinic	Fertility	https://www.ivf.org.uk	London	4
Bridge Clinic	Fertility	https://bridge-clinic.london	London	19
Harley Street Fertility Clinic	Fertility	https://hsfc.org.uk	London	25.4
London Women's Clinic	Fertility	https://www.londonwomensclinic.com	UK wide with London base	30.2
CRGH	Fertility	https://www.crgh.co.uk	London	39.7
Manchester Fertility	Fertility	https://www.manchesterfertility.com	Manchester North West England	45.3
Bristol Centre for Reproductive Medicine	Fertility	https://www.fertilitybristol.com	Bristol South West England	53.3
Create Fertility	Fertility	https://www.createfertility.co.uk	UK wide	60.4
TFP Fertility UK	Fertility	https://www.tfp-fertility.com/en-gb	UK wide	65.2
CARE Fertility	Fertility	https://carefertility.com	UK wide	73.2
Aria Fertility	Fertility (IVF & egg freezing)	https://ariafertility.co.uk/	London	52.7
The Healthcare Management Trust	Health & social care organisation (hospitals)	https://hmt-uk.org/	Wales	56.6
London International Patients	International patient services	https://lips.org.uk	London	63.7
Sapphire Medical Clinic	Medical cannabis clinic	https://sapphireclinics.com/	London	51
Cygnet Healthcare	Mental health	https://www.cygnethealth.co.uk	UK wide	51
Sanctuary Lodge	Mental health & addiction	https://www.sanctuarylodge.com	Halstead Essex East of England	16.8
Castle Craig Hospital	Mental health & addiction	https://www.castlecraig.co.uk	Scottish Borders Scotland	25.7
The Cabin Chiang Mai	Mental health & addiction	https://www.thecabinchiangmai.com	Chiang Mai Thailand	39.7
The OAD Clinic	Mental health & addiction	https://www.theoadclinic.com	London	39.7
Nightingale Hospital	Mental health & addiction	https://www.nightingalehospital.co.uk	London	50.6
The Kusnacht Practice	Mental health & addiction	https://kusnachtpractice.com	Kusnacht Switzerland	61.9
The Priory Group	Mental health & addiction	https://www.priorygroup.com	UK wide	69.2
Healthshare	MSK	https://www.healthshare.org.uk	UK wide	62.9
North Bristol Private Hospital	Multidisciplinary	https://www.nbpp.co.uk	Bristol South West England	1.5
Imperial Private Healthcare	Multidisciplinary	https://www.imperialprivatehealthcare.co.uk	London	14
Phoenix Hospital Group	Multidisciplinary	https://www.phoenixhospitalgroup.com	London and Chelmsford	21
St Joseph's Private Hospital	Multidisciplinary	https://www.stjosephshospital.co.uk	Newport South Wales	23.3
Guy's and St Thomas' Specialist Care	Multidisciplinary	https://guysandstthomasspecialistcare.co.uk	London	26.4
BMI Healthcare	Multidisciplinary	https://www.bmihealthcare.co.uk	UK wide	29.4
New Victoria Hospital	Multidisciplinary	https://www.newvictoria.co.uk	Kingston upon Thames South West London	29.4

Provider	Primary Specialty	URL	Area	Medico visibility score
OSD Healthcare	Multidisciplinary	https://osdhealthcare.co.uk	Hemel Hempstead Hertfordshire	33.1
St John & Elizabeth's Hospital	Multidisciplinary	https://hje.org.uk	London	33.1
King Edward VII Hospital	Multidisciplinary	https://www.kingedwardvii.co.uk	London	36.1
Spencer Private Hospital	Multidisciplinary	https://www.spencerprivatehospitals.com	Kent South East England	38.4
New Foscote Hospital	Multidisciplinary	https://thefoscotehospital.co.uk	Banbury Oxfordshire	40.7
OneWelbeck	Multidisciplinary	https://onewelbeck.com	London	42.9
Kingsbridge private hospital	Multidisciplinary	https://kingsbridgeprivatehospital.com/	NI/ROI	46
KIMS Hospital	Multidisciplinary	https://www.kims.org.uk	Maidstone Kent South East England	48.3
Benenden Health	Multidisciplinary	https://www.benenden.co.uk	Kent and UK wide	52.1
Cromwell Hospital	Multidisciplinary	https://www.cromwellhospital.com	London	52.1
Chelsea and Westminster Private Care	Multidisciplinary	https://www.chelwest.nhs.uk/private-care	London	57.5
The London Clinic	Multidisciplinary	https://www.thelondonclinic.co.uk	London	60.5
Practice Plus Group	Multidisciplinary	https://practiceplusgroup.com	UK wide	67.4
Ramsay Health Care	Multidisciplinary	https://www.ramsayhealth.co.uk	UK wide	67.4
Cleveland Clinic	Multidisciplinary	https://my.clevelandclinic.org	International with London site	72.1
HCA Healthcare	Multidisciplinary	https://www.hcahealthcare.co.uk	London and UK regions	79.9
Spire Healthcare	Multidisciplinary	https://www.spirehealthcare.com	UK wide	90
Bupa	Multidisciplinary	https://www.bupa.co.uk	UK wide	93.8
Circle Health Group	Multidisciplinary	https://www.circlehealthgroup.co.uk	UK wide	93.8
Nuffield Health	Multidisciplinary	https://www.nuffieldhealth.com	UK wide	100
Royal Buckinghamshire Hospital	Neurorehabilitation	https://www.royalbucks.co.uk	Aylesbury Buckinghamshire	59
Leaders in Oncology Care (LOC)	Oncology	https://www.loclondon.co.uk	London	6
Rutherford Cancer Centres	Oncology	https://rutherfordcancercentres.com	UK regional	6
Peter MacCallum Cancer Centre	Oncology	https://www.petermac.org	Melbourne Australia	23
Check4Cancer	Oncology	https://www.check4cancer.com	UK wide	35.7
Gustave Roussy Cancer Campus	Oncology	https://www.gustaveroussy.fr	Paris region France	42.1
MD Anderson Cancer Center	Oncology	https://www.mdanderson.org	Houston Texas USA	47.7
Memorial Sloan Kettering Cancer Center	Oncology	https://www.mskcc.org	New York USA	53.3
GenesisCare	Oncology	https://www.genesiscare.com	International with strong UK presence	58
The Christie Private Care	Oncology	https://www.christie.nhs.uk/patients-and-visitors/private-patients	Manchester North West England	65.2
The Royal Marsden Private Care	Oncology	https://www.royalmarsden.nhs.uk/private-care	London and Surrey	77.1
Moorfields Private Eye Hospital	Ophthalmology	https://www.moorfields.nhs.uk/private	London	85.8
Optical Express	Ophthalmology	https://www.opticalexpress.co.uk	UK wide	77.8
Optegra Eye Health Care	Ophthalmology	https://www.optegra.com	UK wide	65.2
Newmedica	Ophthalmology	https://www.newmedica.co.uk	UK wide	51.3
Optimax	Ophthalmology	https://www.optimax.co.uk	UK wide	51.3

Provider	Primary Specialty	URL	Area	Medico visibility score
Ultralase Eye Clinics	Ophthalmology	https://www.ultralase.com	UK wide	43.7
OCL Vision	Ophthalmology	https://oclvision.com	London	38.1
London Vision Clinic	Ophthalmology	https://www.londonvisionclinic.com	London	32.5
Accuvision	Ophthalmology	https://www.accuvision.co.uk	UK wide with London base	24.6
Centre for Sight	Ophthalmology	https://www.centreforsight.com	Surrey and Sussex South East England	18.2
Vision Scotland	Ophthalmology (eye care & laser eye surgery)	https://www.visionscotland.com/	Scotland	62.1
Harley Street Eye Hospital	Ophthalmology (eye hospital)	https://hseh.co.uk/	London	51
Eye Clinic London	Ophthalmology (private eye clinic)	https://www.eyecliniclondon.com/	London	54.2
London Orthodontics - Dr Simon Manara	Orthodontics	https://www.londonorthodontics.co.uk/	London	40
RNOH Private	Orthopaedics	https://www.rnohprivatecare.com	Stanmore North London	21
The Hamptons Hospital	Orthopaedics	https://thehamptonshospital.com	Peterborough East of England	21
The Regenerative Clinic	Orthopaedics	https://www.theregenerativeclinic.co.uk	London	21
The Vesey	Orthopaedics	https://www.thevesey.co.uk	Sutton Coldfield West Midlands	21
The London Orthopaedic Clinic	Orthopaedics	https://www.londonorthopaedic.com	London	31.8
Schoen Clinic	Orthopaedics	https://www.schoen-clinic.co.uk	London and Birmingham	36.7
Fortius Clinic	Orthopaedics	https://www.fortiusclinic.com	London	49.3
Horder Healthcare	Orthopaedics	https://horderhealthcare.co.uk	East Sussex and Kent	54.1
Sulis Hospital	Orthopaedics	https://www.sulishospital.com	Bath South West England	59.7
Nuffield Orthopaedic Centre	Orthopaedics	https://www.ouh.nhs.uk/noc	Oxford	79.5
OS Clinic	Orthopaedics & sports medicine	https://os.clinic/	London	55.8
Birmingham Children's Hospital	Paediatrics	https://www.bwc.nhs.uk/birmingham-childrens-hospital	Birmingham West Midlands	19
Sheffield Children's Hospital	Paediatrics	https://www.sheffieldchildrens.nhs.uk	Sheffield Yorkshire	24.6
Evelina London Children's Hospital	Paediatrics	https://www.evelinalondon.nhs.uk	London	30.2
Alder Hey Children's Hospital	Paediatrics	https://www.alderhey.nhs.uk	Liverpool North West England	37.3
Bristol Royal Hospital for Children	Paediatrics	https://www.uhbw.nhs.uk/childrens-hospital	Bristol South West England	44.5
GOSH Private Care	Paediatrics	https://www.gosh.org/private-care	London	53.2
Great North Children's Hospital	Paediatrics	https://www.newcastle-hospitals.nhs.uk/services/childrens-services	Newcastle upon Tyne North East England	64.3
Royal Manchester Children's Hospital	Paediatrics	https://www.mft.nhs.uk/rmch	Manchester North West England	77
Royal Belfast Hospital for Sick Children	Paediatrics	https://belfasttrust.hscni.net	Belfast Northern Ireland	85
Noah's Ark Children's Hospital for Wales	Paediatrics	https://cavuhb.nhs.wales/our-services/noahs-ark-childrens-hospital-for-wales	Cardiff Wales	94.5
The Cooden Medical Group	Private clinic (veins, women's health, aesthetics & diagnostics)	https://coodenmedicalgroup.com/	South East	65.3

Provider	Primary Specialty	URL	Area	Medico visibility score
The Fitzwilliam Clinic	Private clinic / hospital services (multispecialty)	https://www.fitzwilliamclinic.com/	Northern Ireland	57.3
The London General Practice	Private GP (general practice)	https://www.thelondongeneralpractice.com/	London	55
London Welbeck Hospital	Private hospital (multispecialty)	https://www.londonwelbeckhospital.co.uk/	London	52.1
The London Welbeck Hospital	Private hospital (multispecialty)	https://www.londonwelbeckhospital.co.uk/	London	52.1
Aspen Healthcare	Private hospitals (multispecialty)	https://www.aspen-healthcare.co.uk/	Nationwide	56.6
The Wye Clinic	Private outpatient clinic (multispecialty)	https://www.thewyeclinic.com/	West Midlands	51
Psymplicity	Psychiatry & mental health	https://psymplicity.com/	London	54.2
London Rhinoplasty	Rhinoplasty (ENT / facial plastic surgery)	https://londonrhinoplasty.com/	London	59
Spine and Pain Centre	Spine & pain management	https://www.spineandpaincentre.com/	London	40
The UK Spine Centre	Spine care (back/neck pain & spinal surgery)	https://ukspinecentre.co.uk/	London	60.5
Isokinetic	Sports medicine	https://www.isokinetic.com	London and international	67.7
Moorgate Andrology	Urology & andrology (men's health)	https://moorgateandrology.co.uk/	London	67.7
Veincentre Limited	Vein treatments (varicose vein clinics)	https://www.veincentre.com/	Nationwide	57.3
Lanserhof at The Arts Club	Wellness & preventive medicine	https://www.lanserhof.com/en/lanserhof-at-the-arts-club	London	62.9

AI optimisation is the new search marketing for healthcare organisations

**Make sure your brand is recommended,
talk to us about GEO.**

Visit medicodigital.com or
email hello@medicodigital.com

