



Healthcare WebWatch 2012

An analysis of web activity in the health and medical sector

21 May 2012

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1 Executive summary

Background

The Private Healthcare UK WebWatch report provides an analysis of web activity in the health, medical and private healthcare sectors in the UK.

Private Healthcare UK (www.privatehealthcare.co.uk) is the leading web portal for private healthcare services in the UK, attracting over 300,000 visits each month. The site is managed by Intuition Communication Ltd (www.intuition-communication.co.uk).

This report has been compiled by Intuition Communication using Experian Hitwise data (www.hitwise.co.uk). Hitwise is an online competitive intelligence tool which monitors activity on over 1 million web sites every day.

What does the report cover?

The report provides insights into the UK online healthcare sector, and into how people are using the web for health information. It answers questions such as:

- What are the gender and age profiles of visitors to health and medical sites?
- What share of web activity does the online health and medical sector account for?
- What are the most visited health and medical sites overall?
- What are the most visited health information sites?
- What are the most visited private hospital company sites?
- What are the most visited health insurance company sites?
- What are the most visited cosmetic surgery company sites?
- What are the most visited search engines in the UK?
- What are the most common health related search terms?
- What are the most common disease/medical condition search terms?
- What are the most common search terms for cosmetic surgery?
- What are the most common search terms for health insurance?
- What is Private Healthcare UK's position in the online health and medical sector?

Key findings

- Health and medical web sites attracted a significantly greater proportion of female visitors (52.9%) than web sites in general (47.1%) over the 12 weeks ending 21 April 2012.
- 40.4% of visits to health and medical web sites were made by people who are over 45, over the 12 weeks ending 21 April 2012.
- NHS Choices was the most visited site in the Health and Medical sector in the UK, followed by Boots, in March 2012.
- Three of the top twenty most visited UK web sites in the Health and Medical sector, during March 2012 relate to obesity, weight loss and dieting.
- The average length of stay on a web site in the Health and Medical sector was 5 minutes 2 seconds in March 2012.
- The specific phrases - "chicken pox", "shingles" and "diabetes symptoms" - were the most common disease/condition related terms typed into a search engine in the 12 weeks ending 21 April 2012, resulting in traffic to websites within the Health and Medical sector.
- Google (Google.co.uk and Google.com), accounted for over 90% of UK searches for the 12 weeks ending 21 April 2012.
- Spire Healthcare (previously BUPA Hospitals) was the market leader in the private hospital sector (as defined in a custom category by Intuition Communication) during March 2012, in terms of web site visits.
- Aviva was the leading health insurance company web site in March 2012.
- The Harley Medical Group was the leading cosmetic surgery company web site in March 2012.
- The most common search terms for cosmetic surgery were "Transform", "Harley Medical Group" and "MYA" for the 12 weeks ending 21 April 2012.
- Company names dominate the common search terms driving traffic to health insurance sites.

2 Methodology

How Experian Hitwise gathers data

Experian Hitwise collects data from Internet Service Providers (ISPs) to understand how UK consumers are using the web. Monitoring a quarter of the UK Internet population, it provides the most extensive sample of internet usage in the UK.

The anonymous data sent from the ISPs include a range of industry standard metrics relating to the viewing of websites including page requests, visits and average visit length. Experian Hitwise then combines this activity data with demographic, lifestyle and transactional behaviour across the thousands of websites that are reported on every day.

Experian Hitwise collects web usage statistics from a geographically diverse range of ISP networks in metropolitan and regional areas, representing all types of Internet usage including home, work, educational and public access.

The Health and Medical market

The Health and Medical market is pre-defined by Experian Hitwise and consists of 1,769 UK based web sites (March 2012).

The rankings

The rankings for the most popular sites are based on the number of visits to those sites over the past quarter.

Visits and market share

Experian Hitwise uses market share of UK visits to determine market share of web activity in a specific market sector. For example, the market size in the Health and Medical sector is calculated by totalling the number of visits to all sites that Experian Hitwise has allocated to that sector (1,769 UK sites in March 2012). The market share for an individual site is calculated by dividing that site's visits into the total visits for that sector.

When considering market share, bear in mind that the market share of any one site is going to be quite small, due to the overall size and number of sites included in the total market. For example, NHS Choices, the UK's most popular Health and Medical site, accounted for 12.35% of all visits to UK Health and Medical sites in March 2012.

Search term analysis

The rankings in terms of search term usage are based on the most popular terms typed into a search engine in the specified period that **resulted in traffic to websites within the Health and Medical sector.**

Disclaimer

The data included in this report is sourced from Experian Hitwise. Any supporting analysis and commentary come from Private Healthcare UK and are not necessarily reflective of the views of Experian Hitwise.

3 The gender and age profiles of visitors to health and medical sites

Experian Hitwise monitors the web activity of a quarter of the UK Internet population, a portion of whom, are overlaid with demographic and lifestyle behaviour to understand the online behaviour of each segment. Thus, it is possible to get an overall picture of the kind of people that are visiting Health and Medical web sites.

Gender of visitor

The data below is for the 12 weeks ending 21 April 2012.

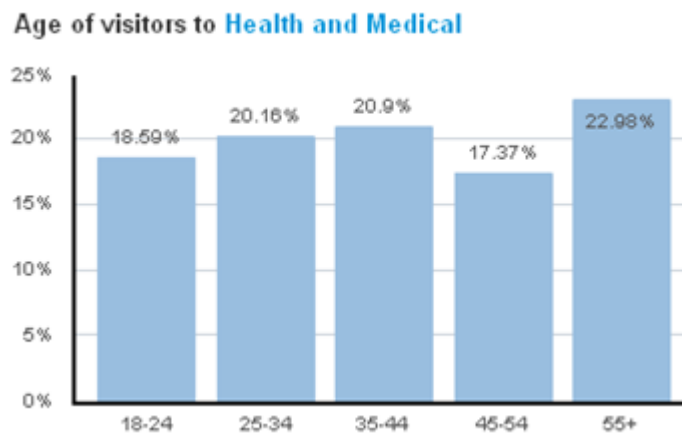
- 47.1% of visitors to **health and medical** web sites are male.
- 52.9% of visitors to **health and medical** web sites are female.

By comparison visitors to the web overall split evenly between male and female. Therefore it appears that health and medical web sites attract a significantly greater proportion of female visitors than web sites in general.

Age of visitor

The data below is for the 12 weeks ending 21 April 2012

For **health and medical** web sites, the age breakdown is as follows:

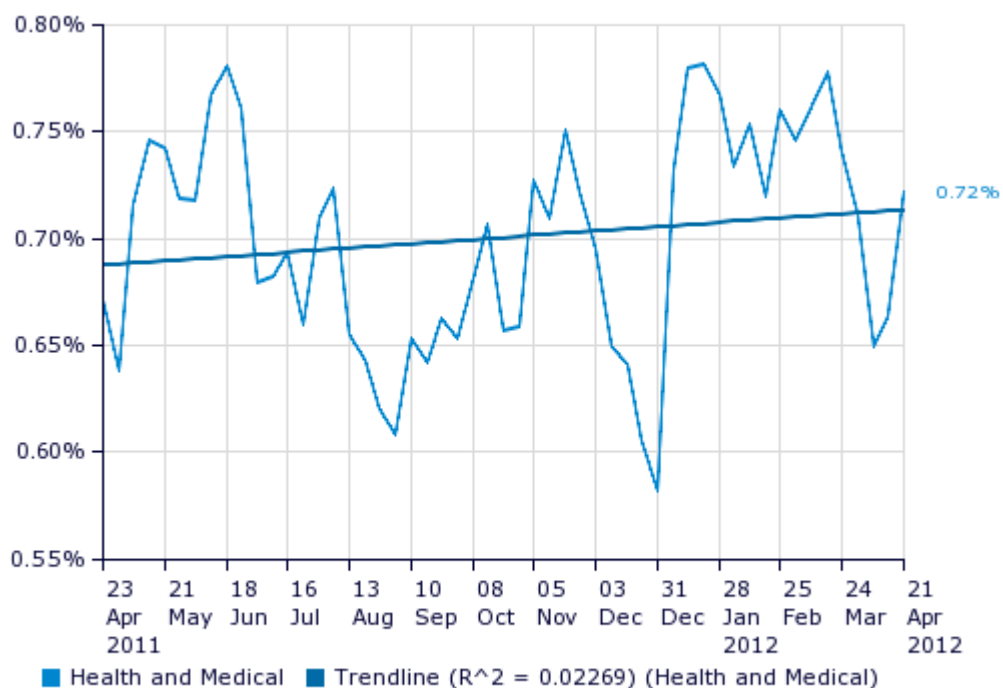


40.4% of visits to health and medical web sites are made by people who are over 45. This is pretty close to the proportion that visit websites in general and perhaps corrects the misconception that the internet is for the young.

4 The Health and Medical sector's share of web activity

Experian Hitwise records activity across all industry sectors. Using this data, we are able to assess how well web sites in the health and medical sector are performing (in terms of number of visits) compared to activity on the web overall.

The UK Health and Medical sector (as categorised by Experian Hitwise) has experienced a marginal increase in market share of all visits over the last twelve months.



Weekly United Kingdom sites market share in 'All Categories', measured by visits, based on UK usage.

Created: 02/05/2012. © Copyright 1998-2012 Hitwise Pty. Ltd. Source: Experian Hitwise UK

5 The most visited sites

The most visited health and medical sites: The top 20

The analysis ranks UK based health and medical web sites according to the number of visits that they receive.

Bear in mind that the number of visits for some of the sites may be distorted by

- non-healthcare related activity (such as retail purchasing on Boots and SpecSavers)
- multiple or regular activity (such as avatar monitoring on Yoobot)

Ranked by market share of UK visits during March 2012:

- 1 NHS Choices
- 2 Boots
- 3 Weight Watchers UK
- 4 Patient UK
- 5 NetDoctor.co.uk
- 6 Yahoo! UK & Ireland Health
- 7 Weight Watchers UK Community
- 8 Boots WebMD
- 9 BBC Health
- 10 Holland & Barrett
- 11 Weight Loss Resources
- 12 Bupa United Kingdom
- 13 Specsavers
- 14 Boots Mobile Version
- 15 PhysioRoom.com
- 16 NHS Direct
- 17 Men's Health UK
- 18 carehome.co.uk
- 19 Department Of Health
- 20 Cancer Research UK Race for Life

The most visited health information sites: The top 5

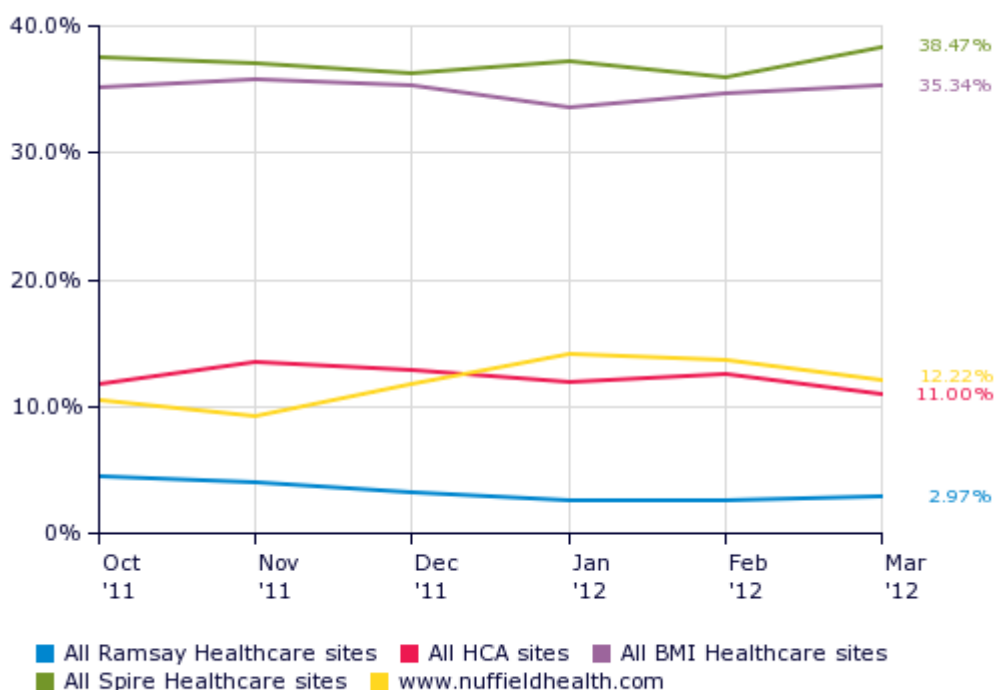
In this analysis, Intuition has selected health information sites **of a general nature**, rather than retail sites, that provide information of use to patients. The analysis ranks these sites according to the market share of visits recorded by Experian Hitwise.

Ranked by market share of UK visits during March 2012:

- 1 NHS Choices
- 2 Patient UK
- 3 NetDoctor.co.uk
- 4 Yahoo! UK & Ireland Health
- 5 BBC Health
- 6 Weight Loss Resources
- 7 NHS Direct
- 8 Men's Health UK
- 9 carehome.co.uk
- 10 Department of Health

The most visited private hospital company sites: The top 5

In this analysis, we have selected private hospital company sites; the custom analysis ranks them according to the market share of visits to all the identified provider sites, as recorded by Experian Hitwise.



Monthly market share in 'Private hospitals' (Cust. Cat.), measured by visits, based on UK usage.

Created: 25/04/2012. © Copyright 1998-2012 Hitwise Pty. Ltd. Source: Experian Hitwise UK

While Spire Healthcare (previously BUPA Hospitals) and BMI maintain their lead in terms of share of visits over the year, visits to all private hospital company sites have stayed fairly consistent.

The most visited health insurance company sites : The top 10

The analysis covers the month of March 2012, and ranks UK health insurance company web sites according to the market share of visits.

It is difficult to identify the top performing health insurance company sites. Activity for some sites, e.g. Aviva UK, includes non-healthcare related activity, and therefore may distort a site's ranking.

Sites such as Private Healthcare UK and MoneySupermarket also attract a great deal of activity for health insurance, but have been excluded from this analysis due to the broad nature of the content of these sites

Ranked by market share of UK visits during March 2012:

- 1 Aviva UK
- 2 Bupa United Kingdom
- 3 SimplyHealth
- 4 AXA PPP Health Care
- 5 Denplan
- 6 BUPA
- 7 WPA Health Insurance
- 8 Bupa International
- 9 Health Insurance Group
- 10 First Assist

The most visited cosmetic surgery company sites: The top 10

The analysis covers the month of March 2012, and ranks UK cosmetic surgery company web sites according to the market share of visits.

The custom analysis has been restricted by Intuition to those company web sites **that cover cosmetic surgery alone**. Thus, broader based sites such as Private Healthcare UK and Spire Healthcare which attract a great deal of activity in this sector are not listed here. We have also excluded general cosmetic surgery information sites such as www.consultingroom.com.

Ranked by market share of UK visits during March 2012:

1	The Harley Medical Group	www.harleymedical.co.uk
2	Make Yourself Amazing	www.mya.co.uk
3	The Hospital Group	www.thehospitalgroup.org
4	Transform Cosmetic Surgery Group	www.transforminglives.co.uk
5	BMI Cosmetic Surgery	www.bmicosmetic.co.uk
6	Ramsay Health Care UK	www.ramsayhealth.co.uk
7	SurgiCare	www.surgicare.co.uk
8	Court House Clinics	www.courthouseclinics.com
9	Landauer Cosmetic Surgery	www.landauercosmeticsurgery.co.uk
10	Beautiful Beings	www.beautifulbeings.co.uk

6 Length of stay on health and medical sites

How long do people stay on a site?

For March 2012, the average length of stay on a web site in the Health and Medical sector (as defined by Experian Hitwise) was 5 minutes 2 seconds.

The sites with the longest length of stay: The top 20

The top 20 UK health related sites by proportion of visits, with the longest average length of stay were...

1	The Biggest Loser Club UK	11:04
2	Weight Loss Resources	10:47
3	MiniMins.com	09:08
4	UK Muscle Body Building Community	08:37
5	Weight Watchers UK	06:49
6	National Institute for Health and Clinical Excellence (NICE)	06:09
7	Holland & Barrett	05:52
8	Boots	05:51
9	Specsavers	05:41
10	carehome.co.uk	05:19
11	Men's Health UK	05:15
12	Diabetes.co.uk	05:07
13	Channel 4 Embarrassing Illnesses	05:04
14	Department Of Health	04:52
15	PhysioRoom.com	04:49
16	Cancer Research UK Race for Life	04:47
17	Weight Watchers UK Community	04:43
18	Chemist Direct	04:33
19	British Heart Foundation	04:26
20	Boots Mobile Version	04:10

The Biggest Loser Club UK, Weight Loss Resources, Weight Watchers UK as well as Weight Watchers UK Community all feature, showing that large proportions of the public spend significant lengths of time on weight loss websites.

7 Search engine usage

The most visited search engines in the UK

For the 12 weeks ending 21 April 2012, the most commonly used search engines based on the volume of searches made by UK users were as follows:

1	www.google.co.uk	86.18%
2	www.google.com	4.13%
3	www.bing.com	4.11%
4	uk.search.yahoo.com	2.73%
5	www.uk.ask.com	1.61%
6	search.orange.co.uk	0.45%
7	search.yahoo.com	0.32%
8	www.google.fr	0.08%
9	www.google.es	0.07%
10	www.ask.com	0.06%

Google UK and Google.com account for over 90% of all searches.

So, if a site isn't listed on Google, or it isn't achieving high rankings through Google Adwords or through "natural" rankings, then it is unlikely to generate a great deal of traffic.

8 Search terms

The most common health and medical related search terms : The top 50

What are people seeking when they enter health and medical terms into search engines?

The analysis covers the 12 weeks ending 21 April 2012, and ranks search term usage based on the most popular terms typed into a search engine that **resulted in traffic to websites within the Experian Hitwise Health and Medical sector.**

1 boots	26 boots opticians
2 slimming world	27 chicken pox
3 weight watchers	28 dukan diet
4 nhs direct	29 my fitness pal
5 holland and barrett	30 nhs.net
6 nhs	31 shingles
7 specsavers	32 weight converter
8 google	33 la fitness
9 bmi calculator	34 boots chemist
10 race for life	35 nmc
11 lloyds pharmacy	36 mens health
12 bmi	37 calorie counter
13 virgin active	38 maximuscle
14 weight watchers login	39 hotmail
15 facebook	40 boots the chemist
16 embarrassing bodies	41 pure gym
17 weightwatchers	42 myfitnesspal
18 pubmed	43 vision express
19 map my run	44 lighter life
20 symptom checker	45 boots.com
21 nhs mail	46 nhs choices
22 david lloyd	47 nhsp
23 weight watchers online	48 diabetes symptoms
24 nhsmail	49 cambridge diet
25 fitness first	50 men's health

The search list demonstrates the trend towards people using search engines to link to sites rather than to search for sites with unknown web addresses – hence the prominence of Boots, Weightwatchers, Specsavers etc despite the fact that they have simple, memorable web addresses.

The most common disease/medical condition related search terms : The top 50

This custom analysis provides an insight into the problems for which people use the web as an information resource. The analysis focuses on the disease and condition related search terms that are most commonly used.

The analysis covers the 12 weeks ending 21 April 2012, and ranks search term usage based on the most common terms typed into a search engine that **resulted in traffic to websites within the Experian Hitwise Health and Medical sector**

AND

which relate to a disease or a medical condition.

1	bmi calculator	26	kidney infection
2	bmi	27	menopause
3	symptom checker	28	norovirus
4	chicken pox	29	breast cancer
5	shingles	30	multiple sclerosis
6	calorie counter	31	flu symptoms
7	diabetes symptoms	32	gallstones
8	glandular fever	33	parkinsons
9	diabetes	34	ovarian cancer
10	bowel cancer	35	autism
11	depression	36	pneumonia
12	symptoms of diabetes	37	appendicitis
13	blood pressure	38	ibs
14	bowel cancer symptoms	39	depression symptoms
15	piles	40	pancreatitis
16	thrush	41	depression test
17	sciatica	42	kidney stones
18	low blood pressure	43	ibs symptoms
19	cystitis	44	impetigo
20	tonsillitis	45	high blood pressure
21	ringworm	46	constipation
22	prostate cancer	47	chlamydia
23	arthritis	48	fibromyalgia
24	scarlet fever	49	diverticulitis
25	conjunctivitis	50	crohn's disease

The most common search terms driving traffic to cosmetic surgery websites: The top 50

This custom analysis provides an insight into the relative importance of different search terms in the cosmetic surgery sector.

The analysis covers the 12 weeks ending 21 April 2012, and ranks search term usage based on the most common terms typed into a search engine that **resulted in traffic to websites within the cosmetic surgery sector** (as defined by Intuition Communications).

1	transform	26	botox
2	harley medical group	27	harley medical group pip implants
3	mya	28	surgicare
4	cosmetic surgery	29	transform medical group
5	liposuction	30	laser liposuction
6	the hospital group	31	harley street
7	breast implants	32	transform cosmetic surgery
8	tummy tuck	33	transformers
9	plastic surgery	34	liposuction cost uk
10	laser hair removal	35	cosmetic surgery prices
11	mya space	36	harley street clinic
12	hospital group	37	the harley medical group
13	mya forum	38	breast enhancement
14	breast enlargement	39	courthouse clinic
15	ramsay healthcare	40	laser lipo
16	liposuction cost	41	tattoo removal cost
17	breast augmentation	42	labiaplasty
18	rhinoplasty	43	tummy tuck cost
19	mya cosmetic surgery	44	gastric band surgery
20	gastric band	45	ipl hair removal
21	nose job	46	vaser lipo
22	harley medical	47	breast uplift
23	microdermabrasion	48	stretch mark removal
24	breast reduction	49	eye bag removal
25	transform cosmetic surgery group	50	mario russo

The top 50 generic searches in the Cosmetic Surgery Industry include common themes such as breast implant or reduction surgery, liposuction, tummy tucks and rhinoplasty (including nose jobs).

The most common search terms driving traffic to health insurance websites: The top 25

This custom analysis provides an insight into the relative importance of different search terms in the health insurance sector.

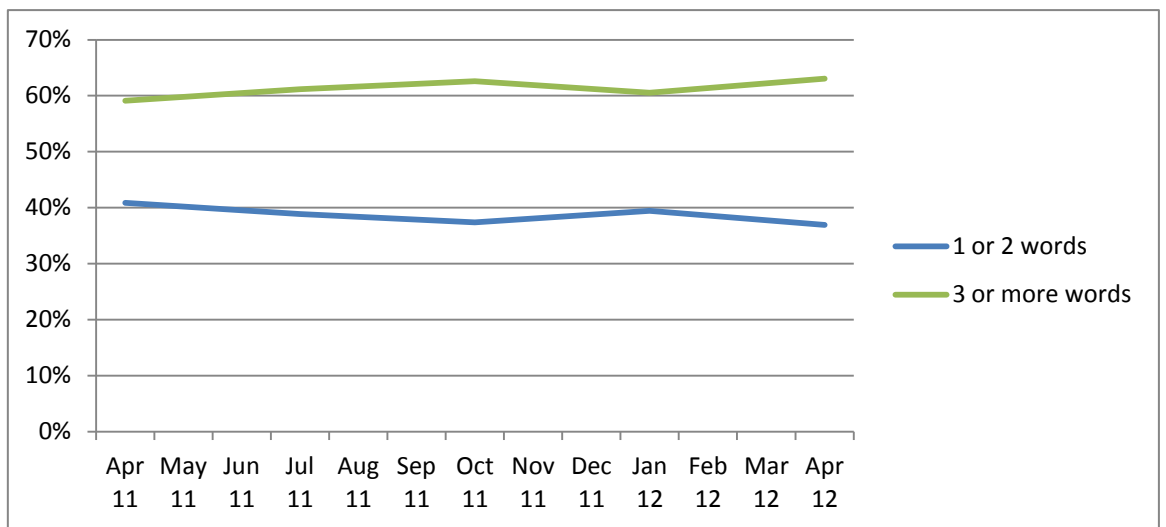
As with share of traffic data (page 10) this list is somewhat distorted by search for non-healthcare related activity. In particular, the Aviva website attracts a great deal of activity outside of healthcare, which accounts for its frequent appearance in this listing. The analysis covers the 12 weeks ending 21 April 2012, and ranks search term usage based on the most common terms typed into a search engine that **resulted in traffic** to websites within the health insurance sector (as defined by Intuition Communications).

- 1 aviva
- 2 aviva car insurance
- 3 bupa
- 4 aviva insurance
- 5 car insurance
- 6 simply health
- 7 denplan
- 8 aviva.co.uk
- 9 car insurance quotes
- 10 bupa jobs
- 11 cheap car insurance
- 12 thyroid symptoms
- 13 axa ppp
- 14 ovarian cancer symptoms
- 15 multi car insurance
- 16 life insurance
- 17 aviva car insurance uk
- 18 wpa
- 19 hsa
- 20 norwich union
- 21 google
- 22 bupa health check
- 23 simplyhealth
- 24 home insurance
- 25 www.aviva.co.uk

How are people searching? Comparing number of terms in a search

People are becoming more sophisticated in the way they search. They are increasingly searching using 3 or more keywords rather than 1 or 2. This gap is even more pronounced than it was for a similar period in 2010, where 1 or 2 words were used 44% of the time on average.

Using a greater number of keywords for a search indicates that people are further into the buying process and are seeking more specific information, rather than just researching. For example, 'rhinoplasty prices in London', rather than just 'rhinoplasty'.

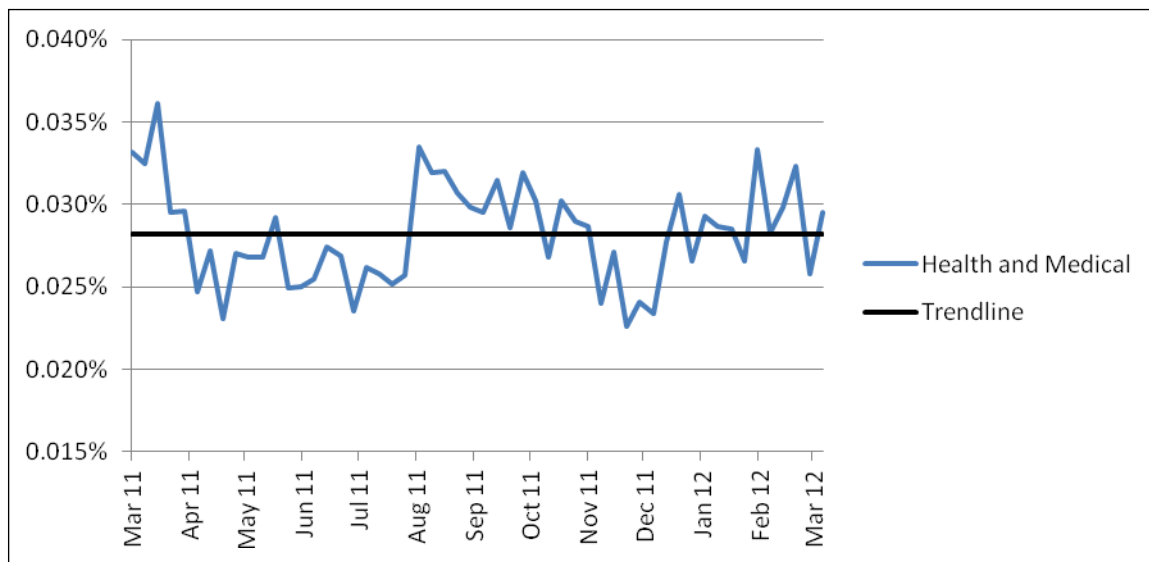


Number of words used in search across "Health and Medical" sector, as defined by Experian Hitwise, based on UK usage

9 Private Healthcare UK: Where do we figure?

Visitors referred from Private Healthcare UK

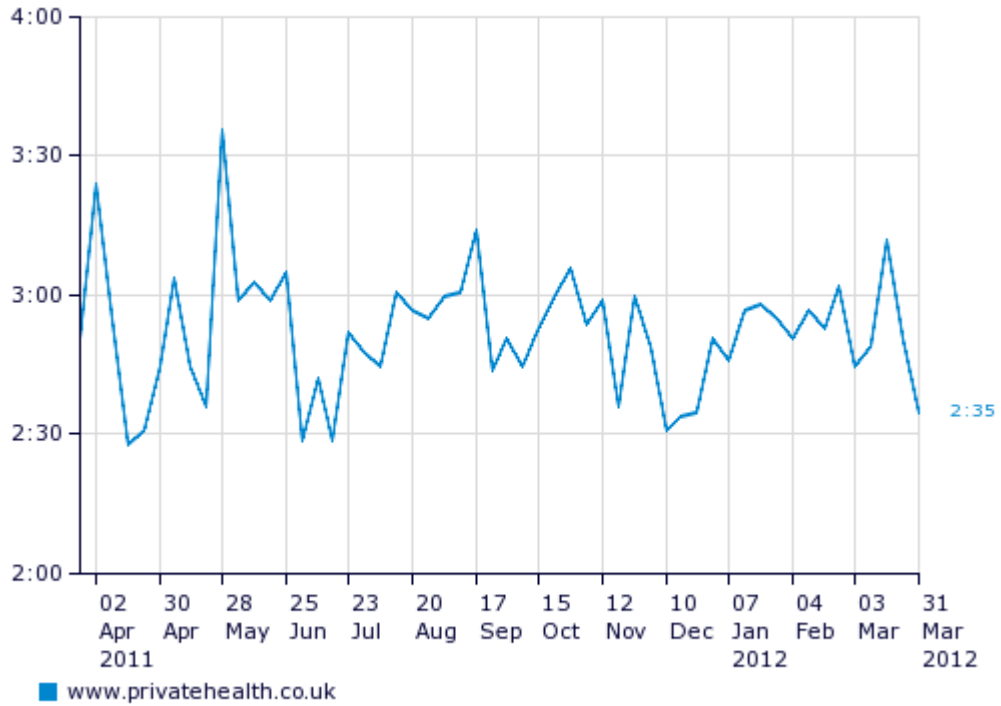
Over the past 12 months, the number of visitors referred to the UK Health and Medical market (as categorized by Experian Hitwise) from Private Healthcare UK (www.privatehealthcare.co.uk) has remained fairly consistent.



Weekly upstream % from 'www.privatehealth.co.uk' to Health and Medical industry, based on UK usage.

Visit Time

The average visit time on Private Healthcare UK has also remained fairly consistent having seen an increase in 2010. The visit time is just over between 2.5 and 3 minutes, showing that people continue to be engaged with the content on the site.



Weekly average visit time, based on UK usage.

Created: 26/04/2012. © Copyright 1998-2012 Hitwise Pty. Ltd. Source: Experian Hitwise UK

Search engines

A major strength of Private Healthcare UK is its command of high positions on search engines.

For example, in March 2012 the average site in the Health and Medical category received 49.3% of its traffic from search engines compared to Private Healthcare's 54.4% share in traffic from this source. This demonstrates the site's significant strength in search engine marketing.

Private Healthcare is the top recipient of traffic for key terms in the health and medical sector.

Websites receiving traffic from the search term **private healthcare**

For the 12 weeks ending 21 April 2012

- 1 Private Healthcare UK
- 2 MoneySupermarket.com
- 3 BMI Healthcare
- 4 Bupa United Kingdom
- 5 HealthInsuranceCompare.co.uk
- 6 AXA PPP Health Care
- 7 Spire Healthcare
- 8 mobile.bupa.co.uk
- 9 Halifax
- 10 citywire

Websites receiving traffic from the search term **private hospitals**

For the 12 weeks ending 21 April 2012

- 1 BMI Healthcare
- 2 Spire Healthcare
- 3 Bupa United Kingdom
- 4 Private Healthcare UK
- 5 BBC Sport
- 6 Nuffield Health
- 7 NHS Choices
- 8 Wikipedia
- 9 BBC - CBeebies
- 10 Dr Foster Health & Medical Guides

Websites receiving traffic from the search term private health insurance

For the 12 weeks ending 21 April 2012

- 1 HealthInsuranceCompare.co.uk
- 2 MoneySupermarket.com
- 3 Bupa United Kingdom
- 4 AXA PPP Health Care
- 5 mobile.bupa.co.uk
- 6 Orange
- 7 Aviva UK
- 8 SimplyHealth
- 9 Private Healthcare UK
- 10 Health-on-line.co.uk

Websites receiving traffic from the search term cosmetic surgery prices

For the 12 weeks ending 21 April 2012

- 1 Transform Cosmetic Surgery Group
- 2 The Harley Medical Group
- 3 Private Healthcare UK
- 4 www.cosmeticsurgeon.co.uk
- 5 The Hospital Group
- 6 SurgiCare
- 7 www.newlookholiday.co.uk
- 8 BMI Healthcare
- 9 www.beautyinprague.com
- 10 www.betterbingoreviews.co.uk

10 Who to contact

For further information about Private Healthcare UK or the Healthcare WebWatch 2012 Report:

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