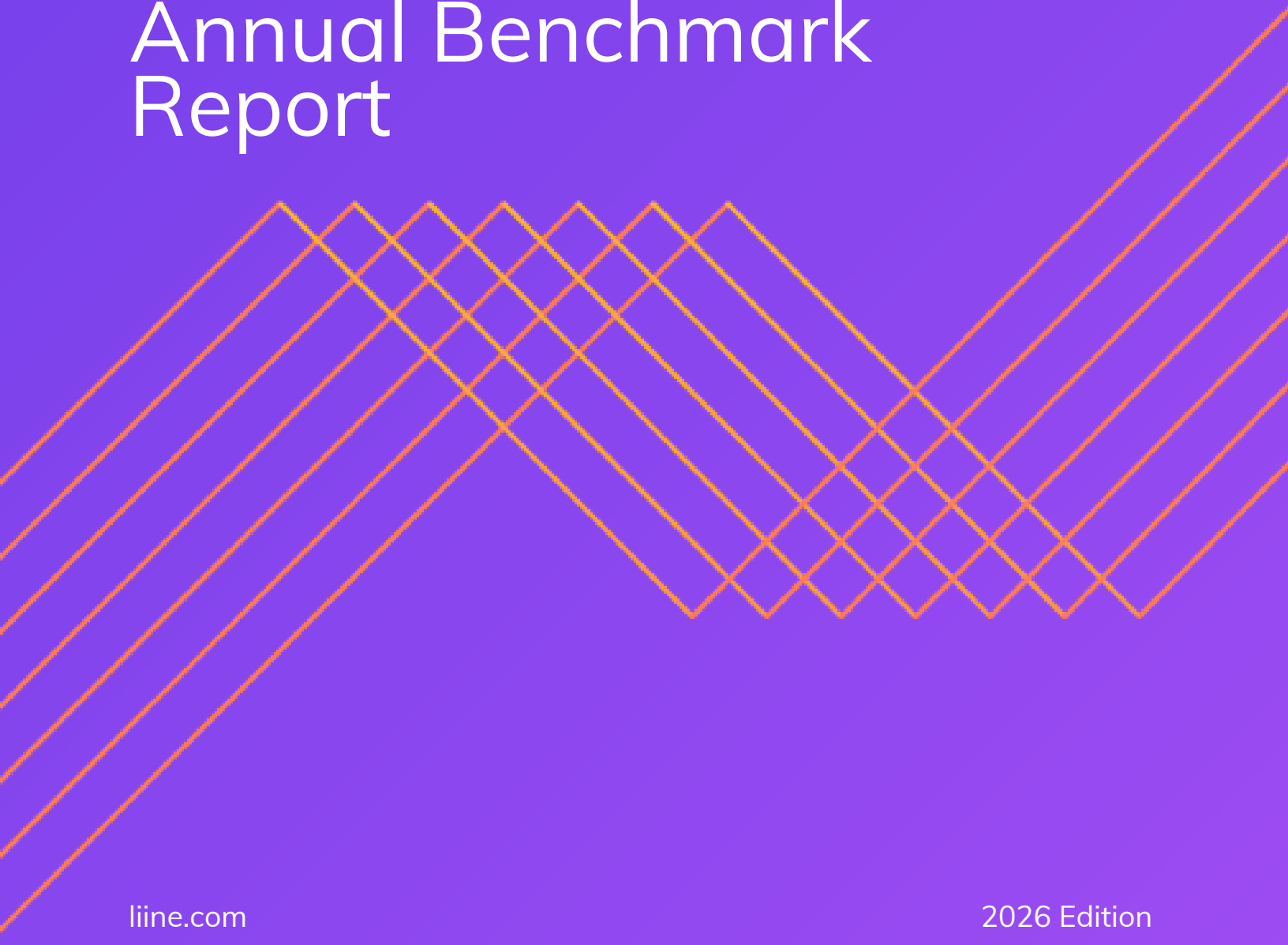
liine

Specialty Healthcare Marketing

Annual Benchmark Report



liine.com

2026 Edition

Intro

What is the benchmark report?

Designed for specialty healthcare and dental practices, this report provides industry benchmarks so marketers can compare performance to their peers and discover high-performing channels and opportunities for marketing investment.

What is the data sample?

This report contains exclusive primary-sourced data from **9.4 million patient interactions** across growth-focused specialties including orthopedics, ophthalmology, general dentistry, oral surgery, aesthetics, podiatry, fertility, behavioral health, veterinary medicine and more. Hospital systems and primary care practices are not represented in this data. **Data analyzed was collected between January 1, 2025 through December 31, 2025.**

What is Liine?

Liine is the AI-powered call tracking, marketing analytics and ad optimization platform built for multisite healthcare, dental and vet practices. Learn more at liine.com.

THE STATE OF PLAY

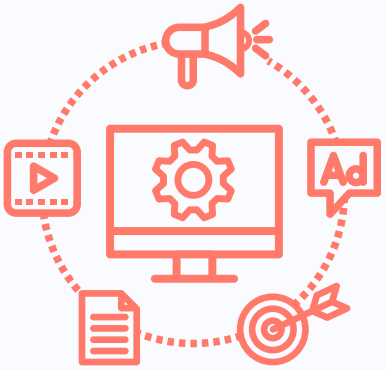
Healthcare Marketing

As providers shifted budget toward digital-first channels, U.S. healthcare digital ad spending increased approximately 13.3% year over year (Bulik, B.S., 2025).

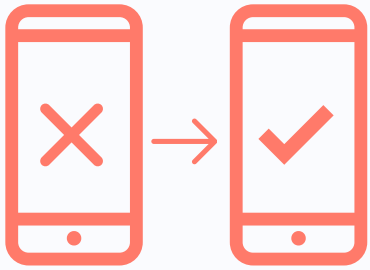
Digital marketing now accounts for more than 72% of healthcare advertising spend, highlighting the central role digital channels play in reaching and engaging patients (Digital Silk, 2025).



U.S. healthcare digital ad spend increased 13.3% YoY.



Digital channels account for over 72% of healthcare ad spend.



65% of patients would switch providers for a better digital experience.

Rising Expectations Around Digital Experience

Trends in digital experience, including AI-driven personalization and mobile-first engagement, are reshaping how patients discover and engage with practices (NTAM, 2025). As patients behave more like consumers, they expect seamless digital experiences from first touch through booking.

In fact, 65% say they would consider switching providers for a more convenient digital experience, such as easier online booking (Tansey, 2025), reinforcing the importance of capturing and analyzing patient touchpoints to accurately measure marketing performance and drive booked appointments.

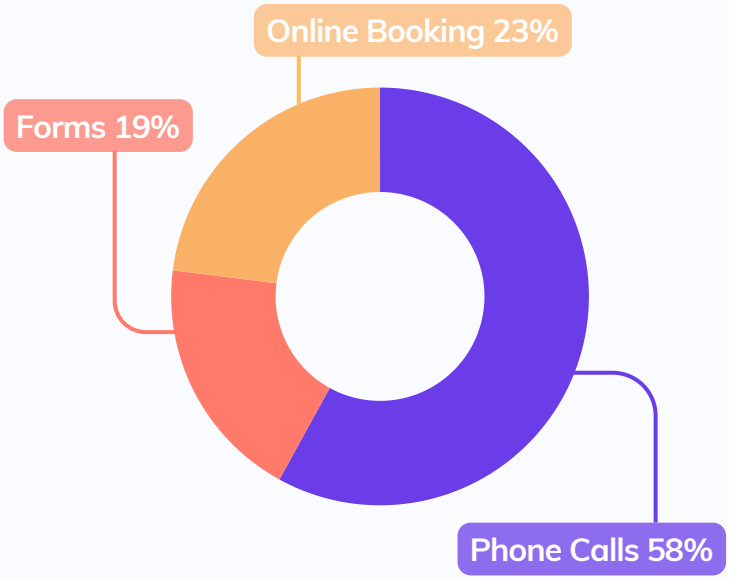
TRENDS

New Patient Leads

New Lead Interaction Type

A “new lead” refers to a prospective patient who has never been seen by the practice.

Phone calls remain the most popular interaction type for new patients, though their share declined 16% YoY. Online booking systems more than doubled in usage compared to the prior year.

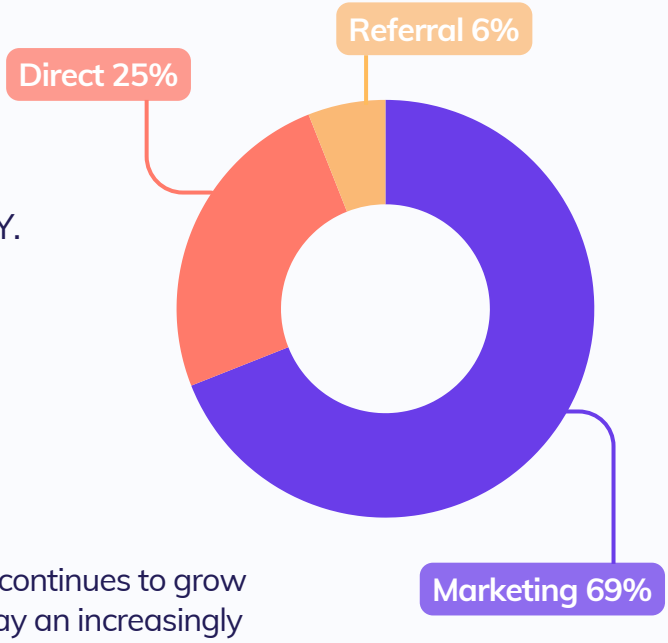


Takeaway:
As patient behavior continues to evolve, tracking marketing attribution and outcomes across all patient touchpoints is critical for understanding what drives booked appointments.

Marketing Contribution

In 2025, marketing drove 69% of new patient leads, which is a 41% increase YoY.

Marketing-driven leads significantly outpaced direct traffic and physician referrals, accounting for more than two-thirds of all new patient opportunities.



Takeaway:
As marketing's impact on practice growth continues to grow year over year, strategic campaigns will play an increasingly central role in capturing patient demand.

TRENDS

Conversion Rates

While there is some variation between specialities, on average, **59% of marketing leads convert** to a booked appointment.

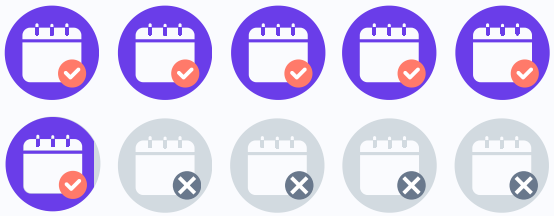
> **Takeaway:**
> In 2025, marketing-driven leads converted to patients at a rate of 59%, while direct leads converted at 66% and referral leads at 64%. While direct and referral sources showed little to no change year over year, the conversion rate for marketing-driven leads increased by 16%, indicating that the "intent" gap continues to shrink.

Conversion Rate for Marketing Leads*

59%

up from 51% (+16% YoY)

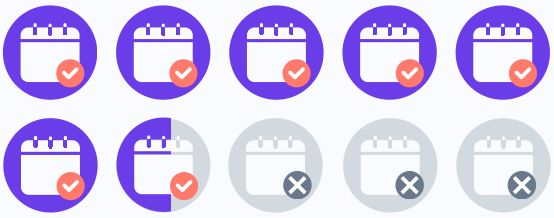
*Includes paid and organic channels



Conversion Rate for Direct Leads

66%

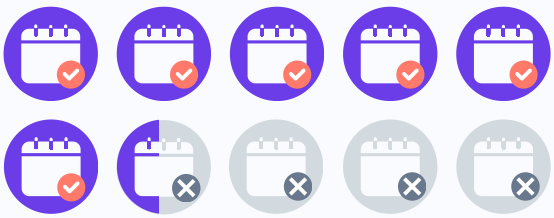
up from 64% (+2.8% YoY)



Conversion Rate for Physician Referral Leads

64%

no change YoY



TRENDS

Top Reasons Not Booked

Liine uses proprietary AI to determine the reason why a prospective patient fails to book an appointment. Below are the top reasons by frequency in 2025.

Top 15 “Reasons Not Booked” by Frequency

Caller Procrastination	20.45%
Insurance Not Accepted	19.12%
Treatment Not Offered	8.52%
Scheduling Issue	7.99%
Referral / Records Needed	6.35%
Dropped Call / Hang Up	6.06%
Took a Message	5.71%
Getting Info for Someone Else	5.41%
Transferred Call Not Answered	2.91%
Not a Candidate	2.08%
Insurance Info Unavailable	1.75%
Caller Verifying Insurance	1.65%
Price Objection	1.23%
Location Too Far	1.23%
Meant to Call Competitor	1.05%



Takeaway:
The top three "Reasons Not Booked" highlight the importance of alignment between marketing and the front desk. Accepted insurance and offered treatments should be made clear early in the patient journey. In addition, scheduling teams should actively guide callers toward booking an appointment, versus simply answering questions.

TRENDS

Google Ads

Optimizing for the Right Metric

Optimizing Google Ads for proxy metrics like calls and clicks instead of actual patient bookings leads to wasted ad spend and inaccurate performance metrics.

Across our customer base, there was a 49% reduction in cost-per-booking when the primary conversion action was changed from calls/clicks to booked appointments.

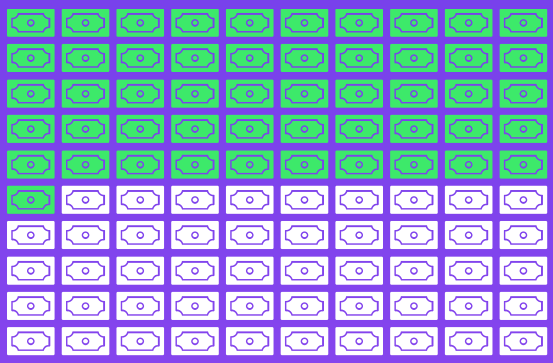
Average Google Ads Cost Per Booking

When optimizing for
Calls & Clicks



$442 per Google Ads booking

When optimizing for
Booked Appointments



$225 per Google Ads booking

that's a

49% drop in cost per booking

TRENDS

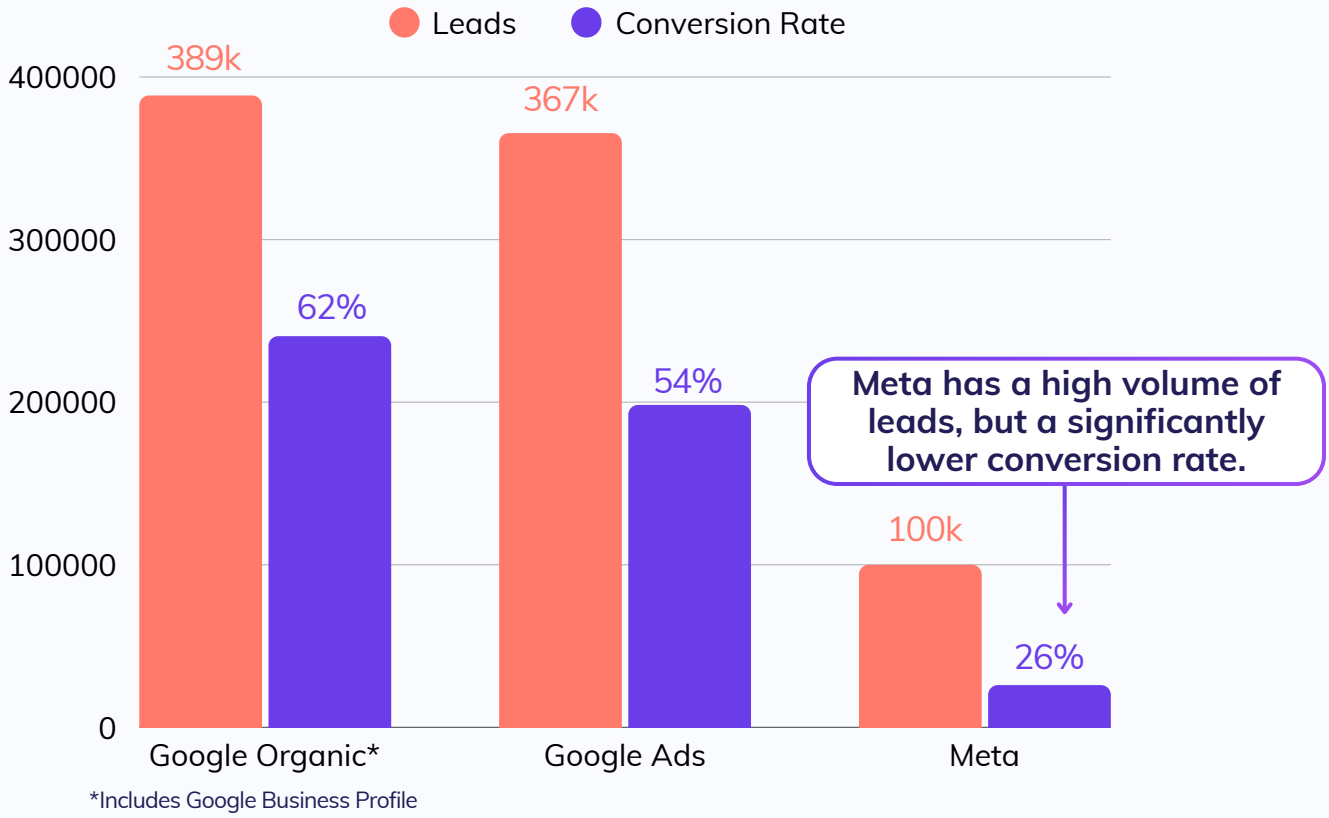
Top Marketing Channels

Excluding direct and physician referral sources, the following were the top three marketing channels by lead volume for new patient leads in 2025, along with their respective appointment conversion rates.

Google Organic, Google Ads and Meta platforms accounted for the majority of marketing-sourced leads. Leads from Google Organic and Google Ads also converted to booked appointments at notably higher rates than Meta.

While Meta generated meaningful lead volume, its conversion rate lagged behind the other top channels (Facebook instant forms performed particularly poorly). This highlights the importance of assessing channels based on both lead volume and booking outcomes

Top 3 Marketing Channels by Lead Volume



*Includes Google Business Profile

Ready to see how your practice stacks up?

Liine is the easiest way to automatically capture every patient touchpoint, know which marketing strategies are most effective and track revenue impact by campaign.

Book a Demo

