

FWD
→ THINKING™



THE
TRUST

2025

GAP
STUDY

fwd

Trust at the Point of Care: Bridging the Gap ⇄ Between Vets and Pet Owners

A word → from FWD People



Trust sits at the heart of veterinary care. It shapes conversations in the exam room, influences decisions long before a visit begins, and ultimately determines how confident pet parents feel in the care their animals receive. But the conditions under which that trust is built have fundamentally changed.

Pet parents are more informed, more confident, and more digitally connected than ever before. Veterinarians, meanwhile, are navigating rising workloads, emotional strain, and increasing pressure to justify clinical decisions in an environment crowded with online opinions, misinformation, and competing voices. The result is not a collapse of trust, but a growing gap in how trust is formed, reinforced, and sustained at the point of care.

The 2025 Trust Gap Study was created to better understand this evolving dynamic. Drawing on insights from veterinarians and pet parents across the United States, this report explores how trust is shifting, where friction is emerging, and what this means for the future of veterinary care and the brands that support it. Throughout the study, we examine the changing role of the veterinarian (from authority to advisor), the emotional drivers shaping pet parent decision making, and the expanding influence of digital channels in the care journey.

At FWD People, we've spent the last seven years working alongside animal health brands and the veterinarians and care teams that are their partners. We understand the realities of clinical practices, the pressures facing the profession, and the growing complexity of the modern pet care ecosystem. We also believe that closing the trust gap requires more than better tools or louder messaging – it requires empathy, clarity, and a deeper commitment to supporting the human relationships at the center of care.

This report is designed to explain the forces reshaping trust at the point of care and to provide a starting point for more human-centered strategies that support veterinarians, reassure pet parents, and guide how brands show up in the care journey.

We hope the insights that follow spark reflection, conversation, and action.



Brooke DeLuise
Managing Director, Animal Health & Pet Care
brooke.deluise@fwdpeople.com

Introduction, Methodology, and Key Takeaways

Increased competition, rising costs, consumer convenience — the veterinary landscape has shifted for good.

We conducted two separate studies with **100+ veterinarians** and **150+ pet parents** across the United States to understand exactly how the new dynamics are playing out.

Our Methodology

We surveyed 150+ pet parents from across the United States, representing a range of ages and genders. Most own dogs – either exclusively (44%) or alongside cats (37%) – with smaller portions owning only cats (19%).

The veterinary sample includes 103 U.S. clinicians working primarily in companion animal practice. The majority work in privately owned clinics, with the remainder from corporate networks. Roughly one-third (31%) are practice owners, partners, or directors, and two-thirds (68%) are associate or employed veterinarians.

95%

of pet parent respondents are ≥25 years old

86%

of veterinarian participants work at a private independent practice

Here's What We Found

01

There's a widening "trust deficit" between empowered, online pet parents and the veterinary teams under pressure to justify their decision making at the point of care.

02

Pet parents have entered a new era of confidence. They have more influence over the pet care journey, which has been considerably fragmented.

03

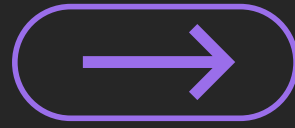
The role of the vet has changed from an authority to an advisor. They find themselves needing to fight misinformation and bring pet owners along on the care journey; animal health brands have an opportunity to better support them in clinic and online.

04

To protect revenue and deliver care, **brands need to adapt how they show up in the modern pet care journey,** especially at the consideration stage.

Read on for more detail on the new dynamics, the possibilities they offer to animal health brands, and the ways in which brands can best act to seize these new [➔](#) opportunities.

Tackling the Trust Deficit



The Veterinary View

“We are competing with influencers, deceptive marketing, and Dr. Google to earn a client’s trust. And sadly, many don’t even want to trust us, they just want us to confirm their own preconceptions and give them the treatment.”

Associate Veterinarian,
Private Independent Practice

Key Stats

80%

of pet parents now
conduct research before
going to their vet

96%

of vets have seen pet parents
become more influenced by online
communities and social media
influencers over the last 12 months

79%

of vets agree that pet parents
are more likely to question
or second-guess vet advice
compared to 12 months ago



The Challenges of Overconfidence



For better or worse, pet parents have entered a new era of confidence. More informed or misinformed, they're certainly feeling empowered.

With this shift, the veterinarian-pet parent dynamic has been irreversibly redefined. **Pet parents know what they want – and they expect their veterinary care team to give it to them.** As pet care becomes more “collaborative,” information becomes more accessible and pet owners become more opinionated. What kind of challenges are arising from the new dynamic?

KEY STATS

67%

of pet parents will arrive at the clinic expecting or requesting particular treatments or tests

64%

are happy to challenge or disagree with vets' recommendations

The Challenges of Overconfidence



71%

of vets say they have to fight misinformation or counter online narratives to build trust

84%

agree that pet parents are becoming more skeptical due to conflicting information online

60%

say that pet parents are comparing vet guidance with online content or peer opinions

The Veterinary View

“I become frustrated and detached when particular clients constantly question or refute my knowledge because of something they read online.”

Associate Veterinarian,
Private Independent Practice

Pet parent confidence is complicating the care process and stressing veterinary care teams — and it's easy to see why. While pet parents are happy to challenge care teams and second guess treatment plans, only a relatively small percentage (34%) are asking more informed and specific questions. Does this suggest that pet parents are too willing to take online information at face value — without applying the necessary critical thinking?

The New Dynamic and the Opportunity for Brands

Vets as Advisors

Vets as Advisors



KEY STATS

1 in 4

pet parents told us what they found online strongly influenced the care they expected to receive in clinic

68%

of vets think pet owners see them as an advisor now

THE VETERINARY VIEW

“I put myself in the client’s shoes and practice empathy and compassion. If finances are a concern, I have them voice that and place several different options for treatment plans together that can best fit them and their pet.”

Associate Veterinarian, Private Independent Practice

Vets as Advisors



The old model no longer works. This new dynamic is here to stay, and with it comes an opportunity for vets and care teams to lean into the role of advisors. Their expertise is increasingly weighted as an equal part of a pet owner's diverse decision-making ecosystem, so much so that 79% of vets agree pet parents are now more active participants in treatment choices.

The role of the vet is no longer defined purely by conversion (diagnosis → treatment → purchase). Instead, vets increasingly anchor the consideration stage — the trusted checkpoint where pet parents validate their research, seek reassurance, and weigh their options.

Animal Health Opportunity: Content for Consideration

88% of pet parents do still trust their vets, showing that clinicians remain a vital source of reassurance and credibility. But they're one part of a greater whole, rather than the deciding factor. As such, brands can help veterinarians shift from authority figures to trusted partners by offering content, tools, and narratives that support shared understanding.

Providing vets and care teams with clear language and supportive resources can strengthen their influence during the consideration stage. Creating products, messaging, and educational materials enables vets and pet owners to co-design care plans, making pet parents feel heard and turning potential friction into collaboration.

An example of this kind of consideration stage tool is Conversation Kits, such as simple visuals, analogies, and talking points for explaining conditions and treatment choices, and diagnostic-to-decision flowcharts that show where a product fits within an evidence-based care pathway. Take-home guides extend the consultation beyond the clinic, giving pet owners clear next steps and reinforcing the vet's expertise.

Animal health brands can also lean into vet-forward consideration stage content like case studies and how-to videos. This type of content creates a groundswell of credible information online, while subtly supporting and showcasing the vet by highlighting their expertise and nudging pet owners back toward them. This people-first content is also a great antidote to cookie-cutter, AI-produced prose, offering new primary material for large-language models like ChatGPT to learn from and AI search to serve.

And where demand and awareness already exist online, brands can empower pet parents to act directly — bridging the gap between professional guidance and consumer decision making. Simplify the role your product plays in the pet care journey and amplify veterinary authority where it matters most.



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The New Dynamic and the Opportunity for Brands

Empathy Over
Everything

Empathy Over Everything



It's vital that veterinarians demonstrate empathy, knowledge, and transparency to forge stronger relationships and build lasting trust. They're rapidly becoming all things to all people. And they're tired.

Pet owners aren't necessarily looking for more technology or even clinical excellence alone. Above all else, they're looking for something more human: empathy and understanding. They want "artisan veterinarians" who blend expertise with compassion and individualized care. So how can brands support this?

Importance of attributes in building client trust

Showing empathy and understanding: **99%**

Explaining clinical decisions clearly: **98%**

Providing transparency around costs: **90%**

Using digital tools to support care: **53%**

Animal Health Opportunity: The Softer Side of Science

With the pet owner wielding more influence in the pet care journey, decision making is ultimately more emotional – and animal health brands can't rely on clinical data alone to build trust.

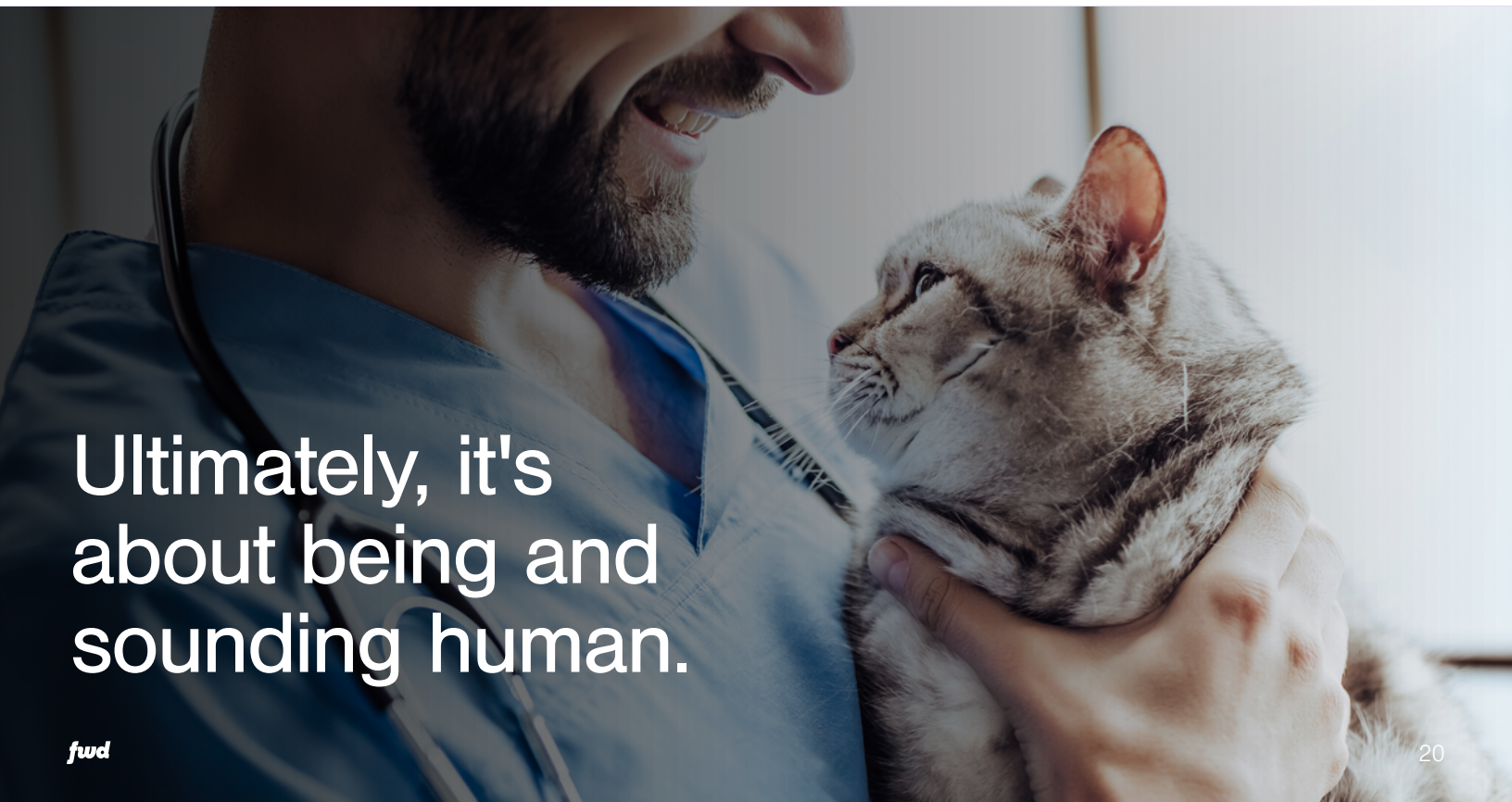
To bridge the trust gap between veterinarians and pet owners, brands need to focus on the softer side of science – more human-centered approaches that foster consistency, presence, and a sense of community. This means highlighting personalized, high-quality care in communications and creating experiences that make pet owners feel seen, understood, and supported.

One way to achieve this is through people-centered activations. Sponsored community initiatives, partnerships with local shelters, discounted spay/neuter days or vaccination clinics, and loyalty programs all bring pet parents back to the practice, reinforcing the veterinarian's role as a trusted partner while building organic touchpoints for your brand “in the wild.” Targeted, local activations in almost a D2C mindset are great opportunities for insight gathering – getting your team in front of vets and pet parents to understand their concerns and issues, as well as the hot topics you could be building your content around.

They are, of course, resource intensive and low reach. And naturally, this human-centered approach should extend into digital experiences and content. Thoughtful UX and UI, 3D animation, interactive experiences, mobile apps, and online community activations help animal health brands engage in more connected, empathetic ways – and provide an antidote to more “bread and butter” search-optimized and AI-generated experiences.

Equally important is empathy for veterinarians and care teams. They're overworked, emotionally stretched, and appreciative of brands that offer tools, content, and experiences that relieve this burden.

Ultimately, it's about being and sounding human. Products are grounded in rigorous science, but communications should be humanized to allow brands to move beyond channel-focused thinking, creating emotional connections that drive better engagement, loyalty, and outcomes.



Ultimately, it's about being and sounding human.

The New Dynamic and the Opportunity for Brands

Online is the
New Frontline

Online is the New Frontline



KEY STATS

96%

of vets have seen pet owners become more influenced by online communities and social media influencers over the last 12 months

70%

of vets believe this is triggered by a rise in online pet care content, communities, and influencers

61%

of vets see pet parents arriving at their clinic more anxious or worried as a result of their own research

As the sheer volume of pet health content online continues to grow – and the number of “online experts” increases alongside it – vets have a new role as a trusted guide through the information that’s out there. Creating, curating, and signposting, the vet is once again cast as advisor rather than purely clinician.

The shift is necessary; this overwhelming wave of online content presents real drawbacks, not least in the form of increased anxiety amongst pet owners. Brands need to meet pet parents where they are – online – with messaging that validates their autonomy, but ultimately steers them back toward vets as the ultimate trusted source.

Animal Health Opportunity: Investing in Veterinarians

For animal health brands, this evolution represents a powerful opportunity. As vets step into this advisory role, brands can help combat misinformation, hero veterinary voices, and build credibility in the process. The rise of AI-generated content and “AI slop” makes this moment especially critical. Now is the time to ensure credible, vet-endorsed information is what surfaces online.

To do that, brands must invest in trusted, vet-advised content that earns authority and

visibility on AI search. This means building online, SEO-optimized repositories of credible information for pet parents, content designed to surface in both AI and Google searches. In a world where credibility is currency, partnering closely with veterinarians is the most effective way to build that trust and drive discovery.

Partner directly with veterinarians and care teams, and your brand can show up authentically in a variety of important ways across a number of digital tactics.

Fight misinformation: Work with vets as brand ambassadors or endorsers to disseminate factual content, build credibility, and even explicitly “call out” misinformation through tactics like TikTok “correction” videos, Instagram Q&A boxes, or Facebook Live. These tactics can feel quite foreign to animal health companies who are so used to working in the B2B space. But with a trusted veterinary face for the brand, you can show up in these spaces — where pet owners are already seeking answers — much more organically.

Facilitate discussion: Again, you don't have to be selling or even talking about the brand explicitly, but by creating spaces where pet owners can connect with your brand, vets can build real trust and generate valuable insight. From Reddit AMAs to user generated FAQs, it's all about creating opportunities for vets to establish their voice as the authority again. (Empathetically, of course!) An added bonus lies in the fact that, because you're not disseminating content in the brand voice, content becomes more reactive and responsive — and lives more authentically online overall.



Pet Parents in Practice: The Next Generation

71% of U.S. households own a pet (94 million households), a recovery in pet ownership levels seen in 2024, with cat ownership returning to prior highs.*

The growth in pet ownership is driven by Gen Z, who are now nearly equal to Boomers in the number of dog and cat owners.*

Gen Z is the only group growing in pet ownership and has now surpassed Millennials in having multiple pets in the household.

Multi-pet households are highest among Gen Zs and growing.*

Pet Parents in Practice: The Next Generation



Vets can't afford to be behind the curve again — and neither can the brands that support them. Gen Z seems to be swinging back toward veterinarians, with the APPA's report highlighting that Gen Zs take their pets to the veterinarian more frequently than any other generation, particularly for grooming and food — two low-stakes, high-frequency interactions that nurture in-clinic trust and the vet-pet parent relationship.

They're already building their own stickiness. Now's the time for veterinarians and their care teams to capitalize on it — and animal health brands can be part of this shift.

GTM is certainly more complex. But against that labyrinthine backdrop, one opportunity is clear — getting closer to the veterinarians and their care teams and understanding the challenges they face.

Veterinary teams are overwhelmed. They recognize the need for strategic change, but struggle to carve out the time in their day-to-day. Brands that support them in navigating this will earn lasting credibility and trust.

If you're considering how to position your brand for the next evolution in veterinary care, we can help.

We know the landscape inside out, and we know that success means bridging science and sensitivity. Even when your products are grounded in clinical excellence, communicating with empathy and authenticity moves your brand beyond channel-focused messaging into true connectivity.

And in a world of overwhelming misinformation and diminishing trust, that's more of an opportunity than ever.



Ready to
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We partner with animal health
and technology clients in pet care.
Are you looking to disrupt the industry?

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FWD People
195 Montague, 11th Floor
Brooklyn, NY 11201