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THE 2025 VETERINARIAN & TECHNOLOGY STUDY

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Veterinarian Technology → Helping or Overwhelming?

A word → from FWD People

Veterinary tech holds undeniable promise in helping pets live longer, making healthcare more affordable, and strengthening the relationship between veterinarian and pet owner.

It represents a chance to learn more, share insight and spend more time on care, rather than "admin". But there's no linear journey to "doing tech" in a clinical and operationally complex business. And organizations that make the change need to drive comprehensive adoption to ensure the returns on new technologies are worth the initial investment.

Veterinarians have scientific brains and compassionate hearts. They save lives and solve problems every day. As caring professionals, issues of organizational planning, technological adoption, change management and employee communication are not areas where thought patterns typically start, nor have they traditionally been a focus for training and education.

And that's important, because adoption of tech is as much about the culture of a clinic as it is about the tool itself. New systems are only as effective as the commitment of the people using them, and without the right onboarding processes to ensure each and every user across a clinic can capably use and understand a tool, new tech can quickly become wasted investment. And worse, feed into a cycle of wariness and apathy.

This study examines ways to help veterinarians close the technology gap, create supportive in-clinic cultures, and embed new technologies within their practices.

At FWD People, we've spent the last seven years getting to know veterinarians and pet owners - what they have in common and their hopes and fears for tech. We understand the pressures, distractions, and demands of their lives — and we know what makes them stop scrolling, take action, and overcome perceived barriers to adoption.

Read on as we uncover and add commentary to insights from hundreds of veterinarians across the United States. We'd love to know what you think of the results, and about the challenges keeping you up at night.



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Key ➔ Findings at a Glance

Veterinary tech holds undeniable promise in helping pets live longer, making healthcare more affordable, and strengthening the relationship between veterinarian and pet owner.

87%

of respondents agree that investing in tech would improve their practice

68%

of respondents agree that investing in connected systems would improve their practice

31%

of respondents believe AI is the trend that will have the most significant impact on clinics

64%

of respondents see staffing and staff training as the biggest priority or area of need in their practice

42%

of respondents say lack of awareness of new tech tools is the biggest barrier to adoption of tech

Framework for → Change

At FWD People, the work we do with animal health leaders has led us to approach the launch and implementation of new technologies within a broad, four-phase framework, the Four E's.

► Empathy

Understanding the mindset of veterinarians and their staff can help you better address their challenges. Communicate that new tools have been developed precisely to help overcome their existing pain points and improve their clinical and financial outcomes.

→ Ease

Veterinarians don't have time to grapple with understanding new technologies. Messaging needs to be simple, to the point and relatable. This starts all the way back with internal portfolio strategy and operational organization.

→ Embed

Showing you understand their world – and getting involved. In-clinic activation through personalized onboarding, tailored training, healthy competition, and putting your own people on the ground can help with the implementation of new technologies.

••• Evolve

Staying close to continue to optimize and adapt the tech and the processes around it. This isn't an overnight switch and it has big implications across the entire operation: be their partner throughout.



The ➔ Veterinarian Perspective

“I'm not sure how I feel about AI. It seems promising for some areas like practice management, but I'm concerned about it removing the critical thinking component of veterinary medicine, especially among newer graduates.”

Tech Trepidation



87% of veterinarians agree that investment in tech would improve their practice.

It's clearly seen as an important tool to lessen in-clinic burdens and help improve care. Independent clinics are more likely to prioritize tech than their corporate counterparts – perhaps more keenly feeling the pinch of online retail competition and wanting to find ways to optimize revenue.

25% Strongly agree

62% Agree

11% Neutral

2% Disagree

However cost, lack of awareness and the need to invest in training are the biggest barriers veterinarians face.

Unsurprisingly, cost is more of a barrier for independent clinics than their corporate counterparts. For Corporate & Speciality (C&S), the biggest barrier to tech is the associated need for investment in training—unsurprising, given their operational scale and perhaps an opportunity for independent clinics to increase competition.

58% Cost

42% Unaware of new tech

40% Investment in training needed

In Two Minds about AI

When asked an open-ended question about trends that will have the biggest impact generally, AI was the clear leader. 31% of respondents called out AI unprompted, with many mentioning that it's already helping with record keeping and comms efficiency. The areas of biggest anticipated impact are:

AI

Treatment evolution

15%

Rising costs

11%

Consolidation and corporatization

11%

Prevention and diagnostics

9%

31%

It seems that AI as a *concept* is intimidating but AI *in practice* is already driving positive progress.

This suggests an overall awareness about its benefits, but there's a nervousness that comes hand in hand with that. This is a very human reaction, of course, trepidation around change. And there were some interesting callouts around why it exists, specifically in the realm of AI.

Qualitatively, veterinarians cited concerns about the potential for AI to replace critical thinking. It's true that in many cases, treatment protocol recommendations lag behind what AI can already do. And there's a need for education at the college level and ongoing training to define and mature the role of clinical reasoning and critical thinking, hand in hand with tech.



When it comes to the more practical aspects of running a clinic, this is where veterinarians feel more comfortable with the role of AI. Veterinarians are overburdened and understaffed. And there's potential for AI to be put to work to ease this pressure. Streamlined workflows, better comms, faster results: all can combine to reduce the resource burden on practices.

It's an area of opportunity, but older veterinarians - who also happen to be the decision makers - are more reluctant. Younger demographics see value in it, but are they being held back by generational fear?

41%

of 25-34 year olds are very interested in AI

25%

of 45-54 and 55-64 year olds said the same

This suggests the need for deeply targeted messaging when encouraging adoption in-clinic. What's going to excite the trail blazing younger generation? And what needs to be said to reassure their older, decision making counterparts?

Areas of Excitement

87% of respondents agree that investing in tech would improve their practice. But they have specific opinions on the areas in which tech can be most impactful. Improved diagnostics and workflow are seen as the main opportunities for tech, with clear benefits on both patient care and revenue.

“Improved diagnostics and artificial intelligence go hand-in-hand. A more affordable, nearly instant answer for pet diagnostics is appealing to both client and veterinarian. Improved client communication is necessary with a tech based world.”



Clinic-tailored use cases are a clear tool for providers promoting AI-based technologies. By drilling down to specific, relatable, operational moments, we can ease the overwhelm of implementing such a huge, new, tech - making it feel more tangible and applicable to the everyday.

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The ➔ Appetite for Change

“Providing quality preventative care and diagnostics will help my clinic to continue growing.”

Diagnostics



When looking to the future of their businesses, veterinarians see significant potential in improved diagnostics and preventative treatment, predicting they will have the biggest revenue impacts on their clinics within the next five years.

AI-powered diagnostics and imaging across radiology, pathology and cytology can vastly improve speed and accuracy. Traditional approaches involve extensive training to carry out in-house, and delays faced in waiting for results on samples or scans sent externally. And while AI-powered solutions reduce human error and should increase diagnostic confidence, there's still that concern around critical thinking to consider.

As AI takes on more diagnostics and preventative care, clinical reasoning and critical thinking will need to evolve into higher-order decision-making and ethical judgment. In theory, this should allow time for more patient-centered, personalized care. AI can recognize patterns, but only veterinarians can put results into the context of quality-of-life decisions.

Patient Communication

Patient communication is perhaps the most straightforward area of a practice in which to introduce tech. Whether that's through automated appointment reminders, AI-powered triage or personalized comms and disease-specific education.

These technologies, put to use most frequently by front desk staff, are more easily adopted. They don't necessarily require the intervention of a veterinarian or veterinarian tech, besides relaying the most critical information.

But there's a balance to be struck. While pet owners have come to expect the convenience of online booking and prescription ordering, for independent practices especially, the in-clinic experience needs to align seamlessly. That means consistent, collaborative work between front desk and clinical staff, so any notes or concerns from pet owners are front of mind for the person providing the first line of care.

Clinic Operations

74%

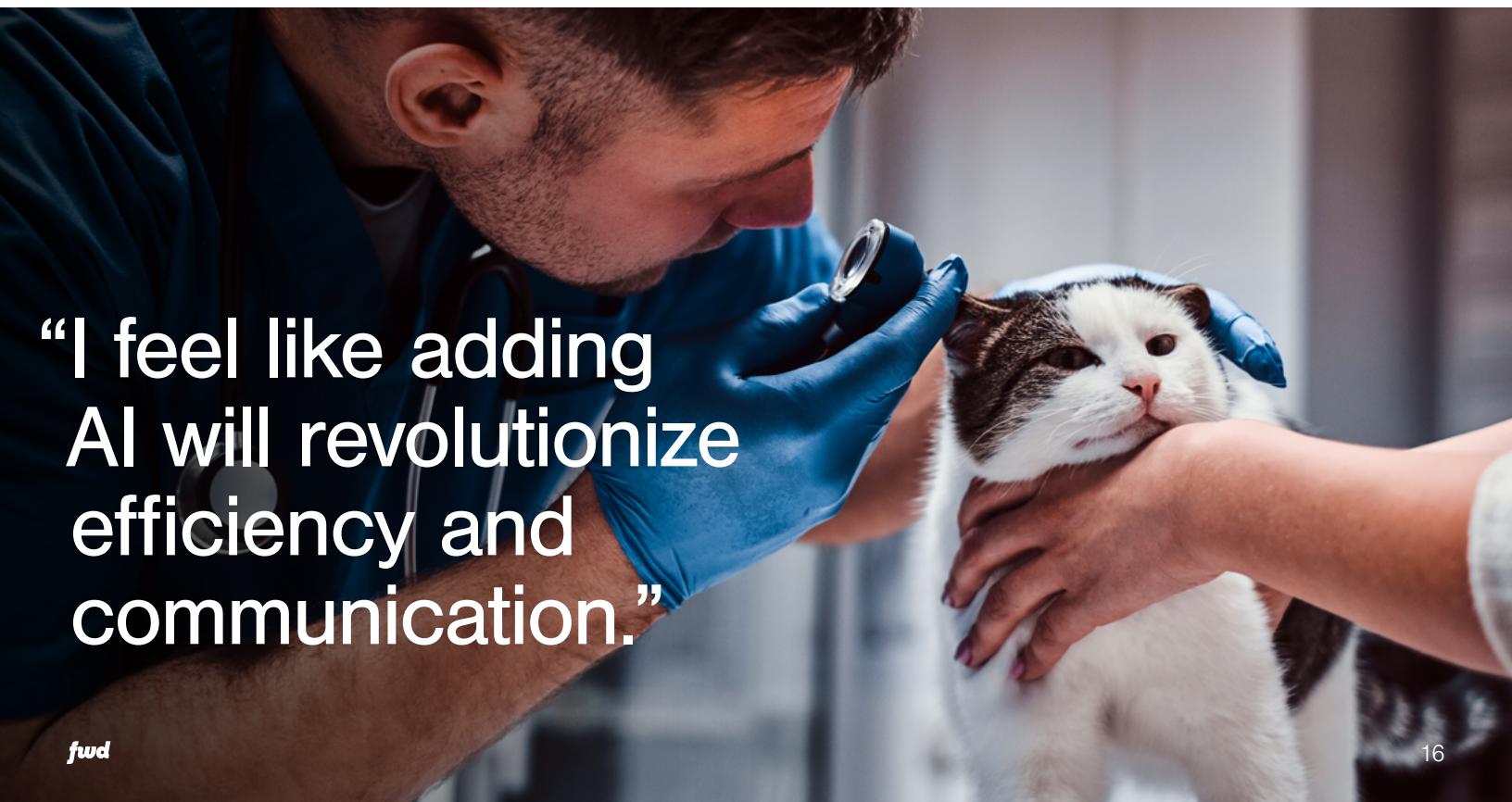
agree that investing in workflow tools would improve their practice

68%

agree that investing in connected systems would improve their practice

AI-powered Practice Management Systems (PIMS) streamline record-keeping and scheduling, reducing the burden of admin for veterinarians. But we know that for many veterinarians, the promise of PIMs does not translate to operational reality. Some systems are clunky, the UI isn't intuitive, and data and workflows are siloed across the practice, hindering efficiency and convenience in itself.

No two clinics are exactly alike. And again, we return to that issue of personalization and training - putting new tech to work as an enabler, not creating a one-size-fits-all approach.



“I feel like adding AI will revolutionize efficiency and communication.”

All Veterinarians aren't Created Equal

Corporate clinics are more able to focus on long term, strategic commercial goals, whereas independent clinics are focused on enhancing operations day to day.

Corporate vs Independent Nuance



Unsurprisingly, some clear splits emerge in the data when we consider perceptions and challenges across corporate and independent clinics.

Staff at both corporate and independent practices are interested in preventative treatment and improved diagnostics; however, corporate staff are more likely to view preventative treatment as a revenue driver, while independent staff are more likely to view diagnostics as a revenue driver.

This perhaps highlights a difference in pressure points between the two practice types. Corporate clinics are more able to focus on long term, strategic commercial goals—boosting retention, identifying upsells, and building a more predictable pipeline. Whereas independent clinics are focused on enhancing operations day to day—finding ways to care more quickly, while minimizing reliance on external services.

Demographic Disparities

When we split the data by age range, veterinarians' views on tech also differ.

25-34 year olds are most likely to be interested in diagnostic trends



But interest in AI decreases with age

This is an interesting finding. AI-enhanced diagnostics tools hold great potential, but this suggests that focus in practice is more concentrated on non-AI diagnostic innovations.



There's a clear shift in seniority across age ranges

There's also a corresponding disparity in strategic priorities vs operational realities.

While 25-34 year olds are most worried about investment in and training on new tech, 35-44 year olds report staff pushback as a bigger hurdle. Perhaps this is a sign of younger employees crying out for new tech while older decision makers are held back by barriers and need more persuasion.



A Closer Look at → Audiences

What the survey has made very clear is the need to consider nuance, demographics and location when targeting clinics with new tech.

Reaching Veterinarians and Pet Owners Effectively

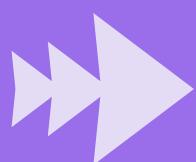
Veterinarians are overwhelmed, with businesses to run and care to deliver. They're facing a perfect storm of competition, rising supply costs, increased staff turnover, and increasingly informed customers.

To navigate these turbulent times, veterinarians need information that's accessible, easy to digest, and most importantly, targeted. Understanding the nuances of different veterinarians, and targeting appropriately, can help drive efficiency and engagement in your outreach.

Pet owners have more choice and control over their pet care than ever. They're also willing to spend more on their pets' care. In turn, they expect deep levels of empathy from their veterinarians, but they also expect convenience, transparency, data-informed decision making, and increasingly personalized diagnostics. But, the core expectation remains the connection between veterinarian, pet, and owner: something technology could never replace.



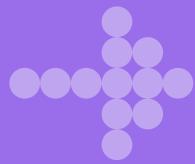
The Four E's in → Action



EMPATHY



EASE



EMBED



EVOLVE



Empathy

Finding the human touch



Be human led, rather than science led. There's plenty of time for that later.

Brands looking for ubiquity in-clinic should do as much as possible to soften the ground for the tech itself via specific use cases and practical examples. Focusing on the outcome – both clinically and financially – and showing empathy for the issues veterinarians are facing is key.

Start small, and start with stories of how this tech has worked in other practices. The tech is important, of course; it brings credibility – but not necessarily adoption. Stories of impact drive awareness and consideration, as veterinarians have practical, tangible examples to resonate with.



Ease

Supporting in-clinic adoption with a tailored approach



Training schools must continue to position AI as a tool to support decision making – not replace it.

What our survey has shown most clearly, is the disparity between available tech and the need for behavior change to embed it. In supporting adoption, providers need to consider that veterinarians themselves may not really want 'off the shelf' and SaaS solutions. While much is made of the simplicity and ease of adoption of new technologies, providers may do well to consider a more tailored, partnership-based approach.

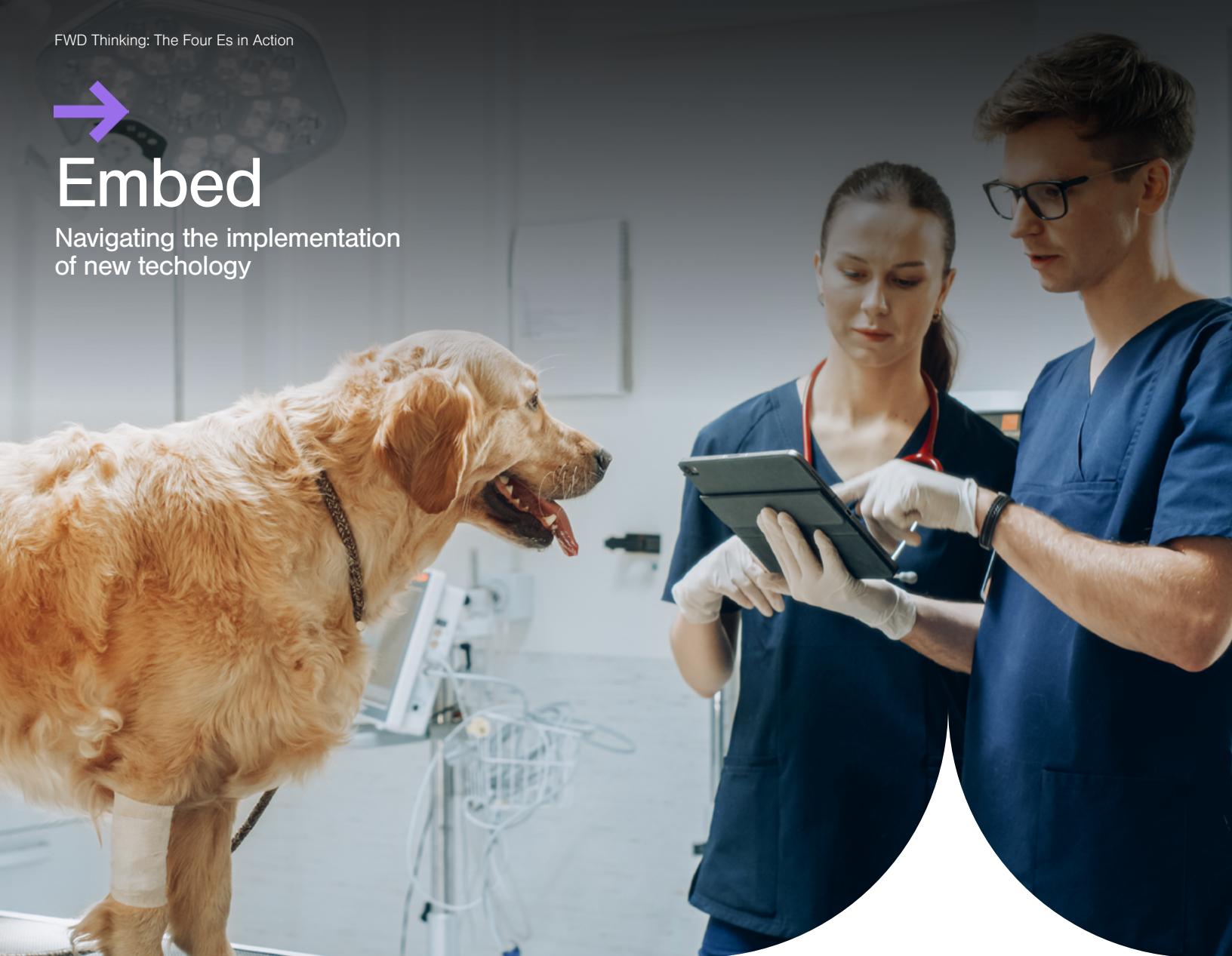
Training schools must continue to position AI as a tool to support decision making – not replace it. It's a useful tool for straightforward cases, but for more complex or rare diagnoses – human intuition and experience is irreplaceable.

For the animal health companies that are pioneering these advances, there's a responsibility to proceed with caution – perhaps considering training programs and collateral that highlights the complementary nature of tech and maintains the ultimate need for expert, human judgment.



Embed

Navigating the implementation of new technology



Tactics need to be kept simple and must be easy to act upon.

Once the decision's been made, the tech has been bought and the initial roll out has begun, it's important that work then goes deeper. To maximize value to veterinarians, and to drive retention for providers, the tech needs to be embedded at every level; shifting key messaging from the 'why' to the 'how'. The features, functionality and practical components that will help clinics see the best return on their investment.

This requires true behavior change, which never happens overnight, and tech providers should continue to educate vets — and often their customers — on the impact the new technology can have.

Consider in-clinic activation campaigns that roadmap and gamify the learning process and make technology feel more approachable. Keep in mind we know how busy vets are — so tactics need to be kept simple and must be easy to act upon, while talking clearly to the specifics of the tool. Branded prizes for completion, that vets can use directly or provide as client giveaways, can also be an effective way to keep your brand and solution front of mind, and make it feel integral to the clinic.

To uncover the tactics outlined here in more detail, take a look at the work we did with Zoetis to embed in clinics across the US.



Evolve

Maintaining a partnership now, and in the future



Early adoption is inspiring. Your first stories and most impactful changes are powerful tools to harness.

Consider the journey at each stage, it's not a linear one: it's easy to default to a launch and leave approach when so much effort and resource is dedicated to planning. But we only know how the market responds once it responds.

Once you have proven positioning and user stories that bring benefits to life, proactively put them out into the world. Here is where you'll find what builds reach, what resonates most and what needs to be honed. Don't assume too much upfront. Listen, learn and adapt.

Early adoption is inspiring. Your first stories and most impactful changes are powerful tools to harness. Consider how you're equipping the advocates of your product. How can you extract more value from the benefits they've seen? How are you leveraging their voices in your communications in the mid to long term?

A strong onboarding and welcome journey for new customers is key - and a fantastic area of opportunity for gathering feedback and focused results. Highlight how well you know them, and ask to know more. Ensure that customer support truly follows a sale. A happy customer is an invaluable voice: staying close to them across adoption doesn't just benefit their practice, but your product marketing too.

Our → Methodology

We surveyed 100 veterinary clinics, collecting both quantitative data and qualitative insights to ensure a comprehensive analysis.

A note on participants

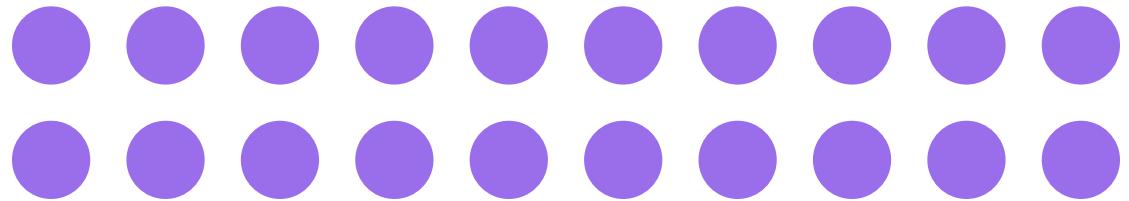
All respondents treat companion animals and are key decision makers or influencers in their clinics. We surveyed owners, operators and employees at independent and corporate clinics across the United States.

Of the participants that took part in our survey, 99% were key purchasing decision makers.

Just 13% were part of a corporate group, with the majority of those we spoke to (87%) forming private independent practices.

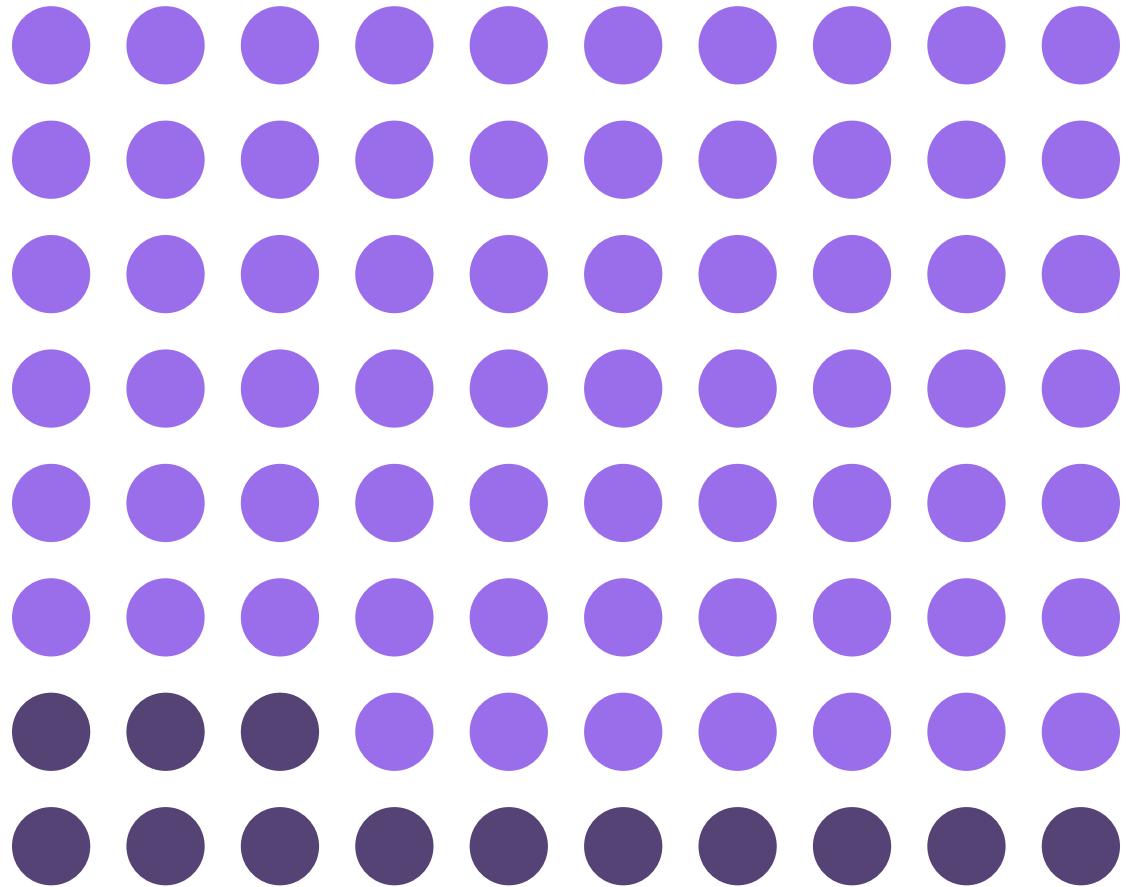
87%

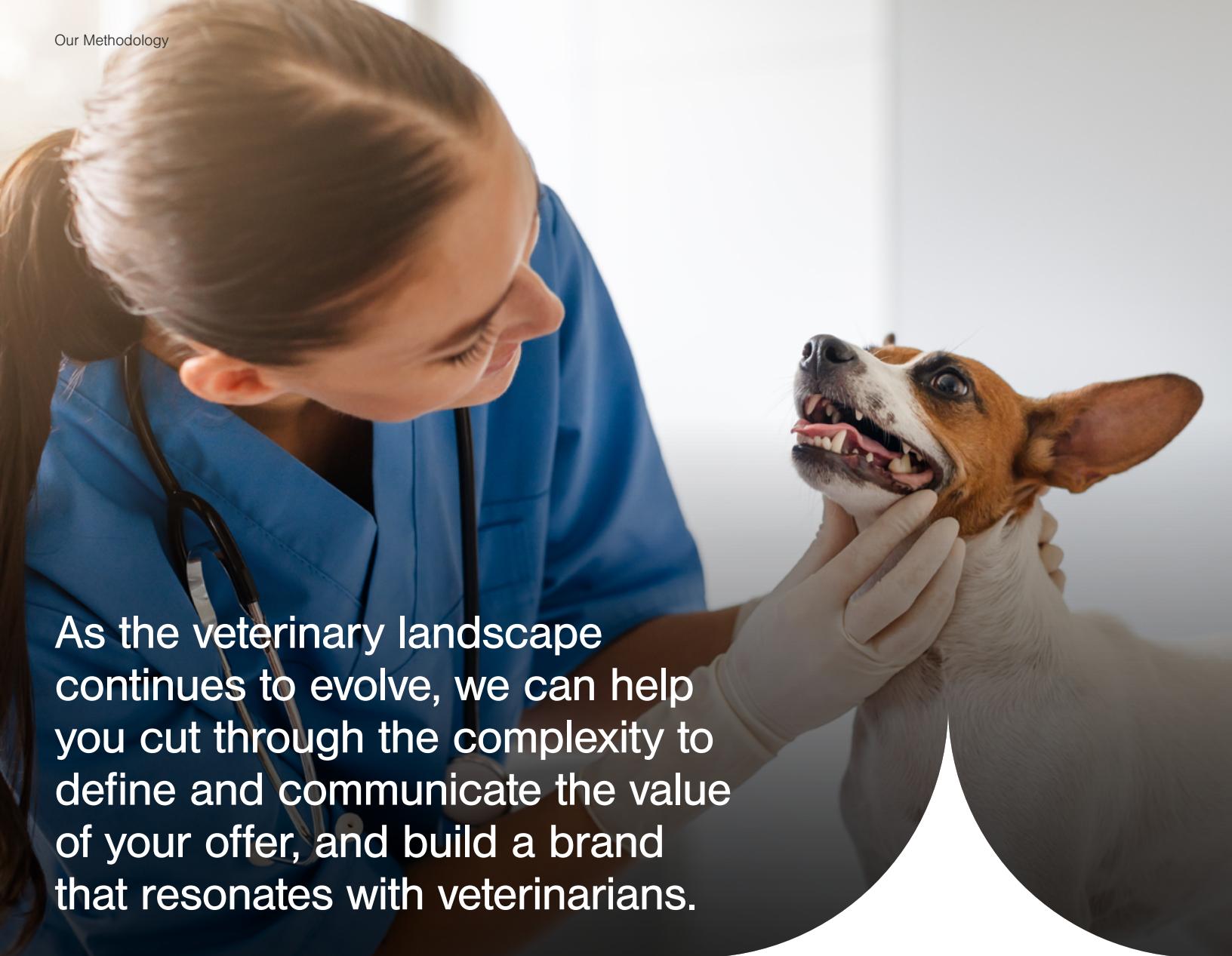
of participants
were part of private,
independent practices



13%

of participants
were part of a
corporate group





As the veterinary landscape continues to evolve, we can help you cut through the complexity to define and communicate the value of your offer, and build a brand that resonates with veterinarians.

We balance science and emotion to help animal health organizations bring clinics closer, deliver better care and ease operational burdens.

Through campaigns and communication strategy, websites and microsites, content for digital or in-person experiences, and activation, FWD helps you most effectively reach and engage with your audiences and deliver long-lasting partnership.

Brand Insights

The 2025 Veterinarian & Technology Study also explored brand awareness and propensity to buy across a number of healthcare and pet food brands. Please reach out if you'd like to learn more about your market position, awareness levels among veterinarians, and the characteristics most associated with your brand.

Areas of Interest

We look forward to speaking to veterinarians and pet owners again at the end of 2025, to understand how attitudes are changing and behaviors are tracking. We'd welcome input on areas you'd like to see explored.



Ready to
move ➔ FWD?

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

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