
5W RESEARCH

AI VISIBILITY INDEX SERIES · VOLUME XI

The Veterinary AI Visibility Index

2026

How Mars Petcare captured nearly a third of every AI answer about veterinary care — and rendered four out of five independent practices invisible.

A research benchmark by 5W Research

Citation data: ChatGPT · Claude · Perplexity · Google AI Overviews

Methodology: 65+ consumer-intent prompts · Top 25 U.S. veterinary brands · Q1 2026

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I.

Executive Summary

Veterinary medicine is one of the most consolidated frontiers in U.S. healthcare — and AI has now ratified that consolidation. The Veterinary AI Visibility Index 2026 ranks the top 25 U.S. veterinary and animal hospital brands by citation share across ChatGPT, Claude, Perplexity, and Google AI Overviews, based on 65+ consumer-intent prompts run in Q1 2026.

One conclusion dominates the data. Mars Petcare — through Banfield, VCA, and BluePearl — captures 27 to 30 percent of every AI answer about veterinary care in the United States. The remaining 70 percent is fragmented across forty-plus corporate groups and a long tail of independents. Within that long tail, the picture is starker still: approximately 80 percent of independent U.S. veterinary practices have effectively zero AI citation share in their own metro and category.

This is the first comprehensive benchmark of how generative AI is reshaping veterinary consumer discovery. It is intended for three audiences: independent practices weighing investment versus exit; corporate operators competing for AI citation share; and the private-capital community underwriting the next wave of veterinary roll-ups, for whom AI visibility is now a diligence item.

II.

27–30%

Mars Petcare's combined AI citation share across the four leading platforms — Banfield, VCA, and BluePearl together.

80%

Independent U.S. veterinary practices with effectively zero AI citation share in their own metro.

11.5%

Banfield Pet Hospital — the single most-cited veterinary brand across ChatGPT, Claude, Perplexity, and Google AI Overviews.

40+

Corporate veterinary practice groups operating in the U.S., backed by Mars Petcare and private equity.

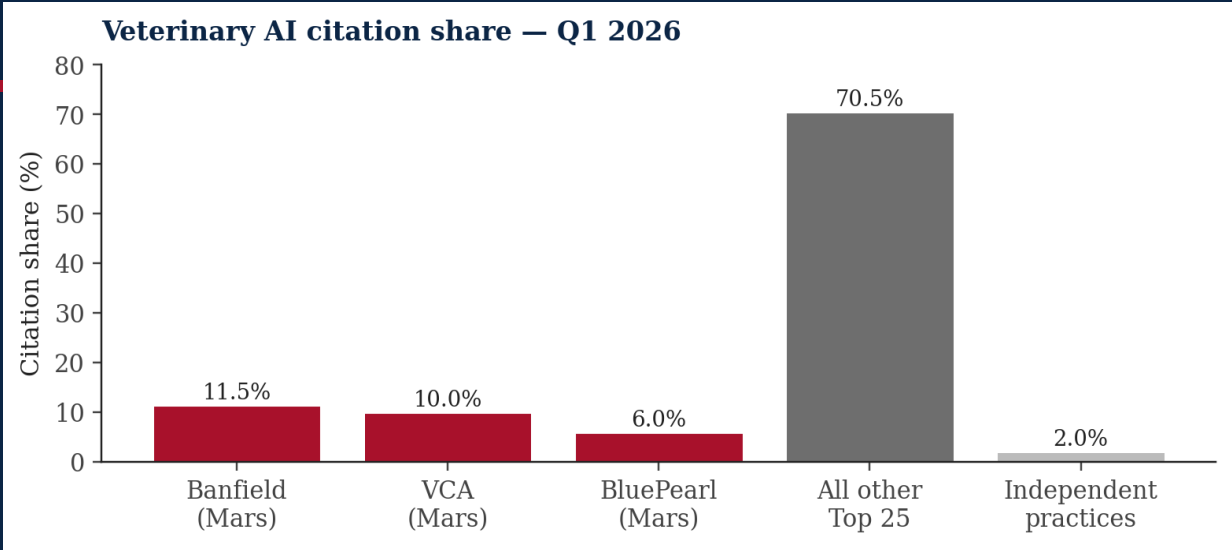
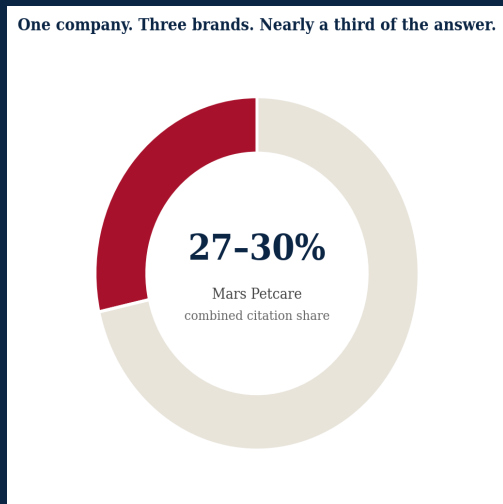


Figure 1. Citation share across ChatGPT, Claude, Perplexity, and Google AI Overviews, Q1 2026. Mars Petcare's three brands occupy the top three positions. The independent long tail registers near-zero share in metro-level queries.

III.

KEY TAKEAWAYS

Mars Petcare's dominance is not the product of marketing spend in the conventional sense. It is the product of digital infrastructure compounding over a decade — structured data, review velocity, authoritative backlinks, and national brand recognition — exactly the signals that generative engines weight when constructing a recommendation. The result is three brands, one infrastructure, and three lanes of citation traffic that no independent and few corporate competitors can match.



Banfield Pet Hospital — 11.5%

The single most-cited veterinary brand across all four AI platforms. Retail partnerships and a national footprint drive consistent recommendation in both general and location-specific queries.

VCA Animal Hospitals — 10.0%

A network of specialty and general practice hospitals delivers steady visibility across ChatGPT, Claude, Perplexity, and Google AI Overviews.

BluePearl Specialty & Emergency — 6.0%

AI platforms route complex and urgent care queries to BluePearl. Leadership in emergency and specialty veterinary medicine.

Figure 2. The combined Mars Petcare share. A single owner, three distinct brand identities, three citation lanes.

IV.

INVISIBILITY

While consolidation accelerates above, invisibility accelerates below. Four out of five independent U.S. veterinary practices register effectively zero citation share in their own metro and category. Thirty years of community reputation does not translate to AI retrieval without the digital scaffolding the engines were trained to read.

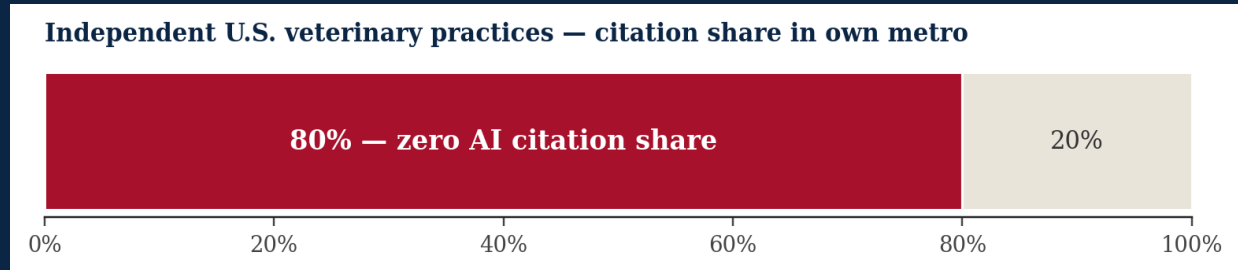


Figure 3. Of independent practices tested in their own metros, roughly 80% returned zero citations across ChatGPT, Claude, Perplexity, and Google AI Overviews.

Even on city-level and neighborhood-level queries, independents are systematically passed over in favor of corporate brands with stronger digital footprints.

Independents typically lack schema markup, review volume, and authoritative backlinks. The engines reward what they can parse — a structural disadvantage that compounds.

AI-driven discovery is becoming the dominant new-patient channel. Practices that cannot be retrieved face accelerating pressure to sell to better-optimized corporate buyers.

V.

Consolidation

U.S. veterinary medicine is consolidating faster than nearly any other healthcare-adjacent category. Forty-plus corporate practice groups now operate nationwide — Mars Petcare's portfolio at the top, a field of regional chains and private-equity platforms below. The thesis is durable: recurring revenue, high margins, demand resilient through downturns, and a fragmented ownership base ready to roll up.

From Mars Petcare's portfolio to regional chains backed by private equity capitalizing on pet care spending growth.

Veterinary is consolidating faster than nearly any other healthcare-adjacent category — favorable unit economics, fragmented ownership, durable demand.

Billions of dollars deployed over the past decade. Recurring revenue, high margins, recession-resilient consumer spending.

Scale converts to digital infrastructure, structured data, and SEO. Digital infrastructure converts to AI citation share. AI citation share converts to patient acquisition. The flywheel runs in one direction.

VI.

Scope	Top 25 U.S. veterinary and animal hospital brands by AI citation share.
Platforms	ChatGPT, Claude, Perplexity, Google AI Overviews.
Prompt set	65+ consumer-intent prompts. General veterinary, emergency, specialty, and location-specific recommendations across major U.S. metros.
Period	Q1 2026.
Metric	Citation share — percentage of total veterinary brand mentions per practice across all prompts and platforms.
Normalization	Prompt volume and platform weighting normalized to enable cross-platform comparison.

Research lead

5W Research, the research division of 5W AI Communications.

DAYS 1–30	AI Visibility Audit & Baseline	Test 20–30 relevant consumer queries across ChatGPT, Claude, Perplexity, and Google AI Overviews. Document baseline citation share. Identify which competitors are being recommended in your place.
DAYS 31–60	Digital Infrastructure Optimization	Schema markup for services, locations, and specialties. Google Business Profile fully optimized — service listings, posts, images. Systematic review generation across Google, Yelp, and industry platforms. Authoritative service pages live.
DAYS 61–90	Content Authority Building	Publish 8–12 authoritative articles addressing common pet health questions in your specialty areas. Secure 3–5 backlinks from local news, pet organizations, or veterinary associations. Re-test the original prompts. Measure lift. Make AI visibility a monthly metric.

