Part VII - Nearly Half of Veterinary Clinicians Now Use AI Scribes … And They're Not Using Their PIMS Vendor's

Ayers Software in Practice Survey: AI Scribe Market Analysis, Adoption

Jonathan Ayers and Adam Wysocki | April 1, 2026

TL;DR

- **Scribe adoption is double the estimates.** Nearly half (47%) of veterinary clinical staff personally use an AI scribe, and 50% of practices have at least one scribe user, roughly double our February 2026 estimate of 20–25%. Canada leads at 65% personal adoption versus 44% in the US.
- **Independent scribe vendors dominate 10-to-1.** The top six scribe-focused vendors command 80.5% of North American weighted market share versus just 8.6% for six PIMS-embedded scribes combined. Every one of the top six products by share, including ScribbleVet, Co.Vet, ScribeNote, and VetRec, is an independent vendor.
- **Satisfaction is not even close.** The top four independents average 5.75 out of 7 in satisfaction with near-zero dissatisfaction (0.6%), while PIMS-integrated scribes average 4.72 with 8.1% dissatisfied, a twelve-fold gap at the bottom. Users praise independents for customizability, ease of use, and accuracy; PIMS scribes draw complaints about verbosity, poor formatting, and glitchiness.
- **PIMS integration is the next focal point.** Nearly 15% of scribe users spontaneously cite PIMS integration in satisfaction comments. They want write-back of SOAP notes and read access to patient history even though the survey never asked about it. The scribes that close this loop, with a PIMS-open API, transform from note-taker into clinical workflow and efficiency platform.

AI Scribe Adoption: The First Comprehensive Market Data

In Part III of this series (February 2026), we estimated that 20% to 25% of veterinarians held scribe subscriptions, while fewer than 10% used them for half or more of appointments. We noted that the data was based on interviews with various players and that rigorous market research was both needed and forthcoming.

That data is now in hand. The ASIPS survey of 1,273 validated practices provides the first statistically representative measurement of AI scribe adoption and market share across English-speaking North America. The findings exceed our earlier estimates on nearly every dimension.

Finding 1: Nearly Half of Clinical Staff Personally Use an AI Scribe

Among veterinarians and veterinary technicians surveyed (the clinical staff present in exam rooms where scribes are used), **46.6%** personally use AI scribe software, at least for some of their appointments. This is not practice-level awareness; it is personal adoption by the individual clinician.

The rate is remarkably consistent between veterinarians (46.6%) and veterinary technicians (46.7%), suggesting that scribe adoption is a clinical-team phenomenon, not solely a veterinarian tool. Associates adopt at materially higher rates than practice owners (51% vs. 33% in the US), consistent with employed clinicians embracing workflow tools faster than those bearing the purchasing decision.

Table 1: Clinical Staff Personal AI Scribe Adoption Rate

Clinical Staff Role	NA Weighted	United States	Canada
Veterinarians (combined)	**46.6%**	44.4%	64.3%
Practice owners/partners	35.1%	32.6%	55.2%
Associate/employed vets	52.9%	51.0%	68.5%
Veterinary technicians	**46.7%**	44.3%	66.7%
All clinical staff	46.6%	44.4%	64.6%

Base: All clinical staff surveyed (vets + techs), whether or not they use a scribe. NA weighted by practice count (30,000 US; 3,614 English-speaking Canada).

Finding 2: Half of All Practices Have At Least One Scribe User

At the practice level, 50% of all surveyed practices (weighted properly between US and Canada) report that at least one staff member uses AI scribe software. In the United States, 48% of practices have adopted; in Canada, 67%.

Finding 3: Corporate Practices Lead, but Independent Adoption Is Broadening

US corporate practices report 66% scribe adoption versus 40% for independents. In Canada, corporate adoption reaches 84% versus 61% independent. Corporate mandates, centralized technology strategies, and corporate funding of scribe subscriptions (versus veterinarian self-funding) clearly accelerate adoption. Still, the independent rate of 40% in the US, up from reportedly negligible levels just 18–24 months ago, signals that scribe technology has crossed from early-adopter to early-majority territory across the full practice landscape.

Table 2: Practice-Level and Clinical Staff AI Scribe Adoption

Metric	NA Weighted	United States	Canada
Practices with at least one scribe user (QB7)	50%	48%	67%
Corporate practices		**66%**	84%
Independent practices		**40%**	61%
Clinical staff personal adoption rate	47%	44%	65%
Sample (practices)		n=1,057	n=216

Source: ASIPS/Kynetec (n=1,273). QB7: "Does anyone in your practice currently use AI Scribe software?" Clinical staff adoption from QB8AC personal use responses among veterinarians and technicians.

Finding 4: Focused Scribe Vendors Hold an Overwhelming Lead over PIMS Scribe Offerings

Among clinical staff who personally use AI scribes, scribe vendors who are focused exclusively on developing scribing and closely related software, and are thus independent of PIMS vendors, dominate the market. The top four products by North American weighted share are all scribe-focused: ScribbleVet (24.8%), Co.Vet (22.8%), ScribeNote (19.3%), and VetRec (5.8%). The top six scribe-focused vendors collectively[1] command 80.5% of weighted mentions, versus just 8.6% for six PIMS-embedded scribe offerings combined. That is a ratio of nearly 10 to 1.[2]

The strategic advantage of category leadership. This 10:1 focused-to-PIMS ratio carries likely compounding strategic advantages, a general phenomenon observed in AI offerings across industry.

Here is the hypothesis why:[3] In AI-native categories, market share leadership has been observed to generate a self-reinforcing advantage: each additional user interaction produces (in the case of scribes) clinical feedback (physician corrections, template refinements, terminology patterns, species-specific vocabulary) that compounds into higher accuracy, better output quality, and richer feature sets. The focused scribe vendors, with far larger installed bases, have accumulated more of these improvement cycles than PIMS vendors whose scribe modules represent one feature among many. PIMS vendors must allocate finite development resources across dozens of product categories (scheduling, billing, inventory, reminders, client communications) while simultaneously trying to build competitive scribe functionality from a standing start. The focused vendors, by contrast, have concentrated all of their engineering,

[1] Includes Talkatoo and HappyDoc which together add a combined share of 7.2%.

[2] On ScribbleVet: Instinct Science acquired ScribbleVet on January 16, 2026, positioning the combined entity as the industry's first "clinical intelligence platform." However, both companies have made explicit, parallel commitments to maintaining open third-party integrations. Rohan Relan, ScribbleVet's founder, stated: "ScribbleVet will continue to support multiple PIMS integrations." Instinct's press release confirmed: "Instinct will continue to support multiple AI scribe integrations." We classify ScribbleVet as independent in this analysis given these commitments and its continued operation as a standalone product across PIMS platforms. Their independence can be distinguished from a PIMS that develops a scribe offering exclusively for its subscribers and does not market it externally.

[3] The historical development of this strategic framework, from the BCG experience curve through the AI data flywheel, is further discussed in the Appendix.

product, and clinical-feedback resources on scribing alone, and they started earlier. The result is a product quality advantage (as evidenced by the satisfaction scores in this survey) that likely widens over time, not narrows.

The satisfaction data from customer comments bears this out. Among the named brands with sufficient sample size for measurement, the four leading independents (Co.Vet, ScribbleVet, ScribeNote, VetRec) achieve Top-2-Box satisfaction scores averaging **74%,** while the PIMS-embedded scribes as a group averaged **40%**.[4] The gap likely reflects the compounding benefit of focused development and larger installed bases. The satisfaction scores received by these leading scribe-focused vendors are at levels rarely seen in veterinary software and are above the satisfaction levels of all but one of the PIMS vendors.[5]

Part III of this series theorized that scribing software is *not* a commodity. High-quality scribing requires continuous improvement loops and domain-specific error handling. The focused vendors have had far more time in that loop, while expanding their feature list within the scribe domain.

An emerging hypothesis from this series: PIMS vendors should be focused on being the best PIMS available, which means building open database access to the third-party innovators who are doing one thing well.

Two corporate deployment patterns are also worth noting. ScribeNote has been adopted as the standard AI scribe at Mission Pet Health (a 2025 merger of Southern Veterinary Partners and Mission Veterinary Partners), which operates approximately 950 practices with over 2,000 veterinarians. In the survey, **28 of 42** US corporate ScribeNote personal users (67%) are Mission Pet Health employees. This single corporate relationship accounts for 39% of all US ScribeNote use.

Table 3: North America AI Scribe Weighted Market Share: Clinical Staff Scribe Users

AI Scribe Product	NA Weighted Share	US Share	Canada Share	Category
ScribbleVet†	24.8%	29.0%	0.9%	Independent
Co.Vet	22.8%	14.5%	70.6%	Independent
ScribeNote	19.3%	20.9%	10.1%	Independent
VetRec	5.8%	6.4%	2.8%	Independent
Talkatoo	4.6%	4.9%	2.8%	Independent
HappyDoc	3.1%	3.5%	0.9%	Independent
Top Six Independents	**80.5%**	**79.1%**	**88.1%**	
VetSoap*	3.3%	3.8%	0.9%	Corp-proprietary
All PIMS Scribes (6 in total, built-in)	**8.6%**	**9.0%**	**6.4%**	

*† ScribbleVet was acquired by Instinct Science (Jan 2026). See footnote 2 for open-integration commitments and classification rationale. * VetSoap: all 13 US respondents are VetCor employees; zero independent use. ** PIMS*

[4] Excludes five responses from Digitail. See further in the paper.
[5] Source: The same ASIPS 2026 market research. PIMS share and satisfaction analysis will be the subject of a future paper.

built-in scribes include ezyVet AI, Vetspire AI, Shepherd AI, Neo AI, Pulse/Covetrus AI, and Digitail AI. Weighted by practice count: US=30,000 (wt=31.41), Canada=3,614 (wt=17.29). Base: Clinical staff who personally use AI scribe software (US n=424, Canada n=135).

Table 4: AI Scribe Satisfaction: Named Products with Sufficient Sample

Product	n	Mean (1–7)	T2B (6+7)	B2B (1+2)	Category
Co.Vet	127	5.9	70%	0%	Independent
ScribbleVet†	100	5.8	66%	0%	Independent
ScribeNote	82	5.7	66%	2%	Independent
VetRec	25	5.0	24%	0%	Independent
PIMS built-in scribes, excluding Digitail (5)**	**30**	**4.8**	**40%**	**13%**	Built-in
Digitail (very small sample, directional only)	**5**	**6.2**	**80%**	**0%**	Built-in

*† ScribbleVet: see footnote 2. Source: QB8C/QB8D. 7-point scale. T2B = Top 2 Box (6+7, "Satisfied"). B2B = Bottom 2 Box (1+2). ** PIMS built-in scribes: ezyVet AI (n=5), Vetspire AI (n=10), Shepherd AI (n=4), Neo AI (n=6), Pulse/Covetrus AI (n=5), Digitail AI (n=5). Individual sample sizes are small; grouped figure is directional.*

Customer Sentiment: Scribe-Focused versus PIMS-Integrated Offerings

The satisfaction gap between scribe-focused and PIMS-integrated offerings extends beyond the summary statistics presented above. A detailed comparison, disaggregated to the individual product level, reveals a consistent pattern: the four leading scribe-focused products (Co.Vet, ScribbleVet, ScribeNote, VetRec) each outperform the PIMS-integrated group on every satisfaction metric, and the aggregate gap is substantial.

Table 5: Detailed Satisfaction Comparison: Top 4 Scribe-Focused vs. PIMS-Integrated Scribes

Scribe	n	Mean (1–7)	Satisfied (6–7)	Moderate (3–5)	Not Dissat. (3–7)	Dissat. (1–2)
Top 4 Scribe-Focused (Independent) Offerings						
Co.Vet	127	5.91	70.1%	29.9%	100.0%	0.0%
ScribbleVet	104	5.82	65.4%	34.6%	100.0%	0.0%
ScribeNote	84	5.64	64.3%	33.3%	97.6%	2.4%
VetRec	25	5.00	24.0%	76.0%	100.0%	0.0%
Top 4 Combined	**340**	**5.75**	**63.8%**	**35.6%**	**99.4%**	**0.6%**
PIMS-Integrated Scribes (small sample sizes; directional only)						
Digitail	5	6.20	80.0%	20.0%	100.0%	0.0%
PIMS-Integrated Excluding Digitail	**37**	**4.72**	**37.8%**	**54.1%**	**91.9%**	**8.1%**

Source: ASIPS/Kynetec (QB8C/QB8D). 7-point scale. Satisfied = Top 2 Box (6+7). Moderate = Mid-range (3–5). Dissat. = Bottom 2 Box (1+2). PIMS-integrated individual sample sizes are small; individual product figures are directional. Aggregate figures are more reliable.

Table 5 extends the summary in Table 4 by adding the moderate and not-dissatisfied columns that reveal the full shape of the distribution. Perhaps most revealing is the dissatisfaction gap: virtually no scribe-focused users express outright dissatisfaction (0.6% Bottom 2 Box), compared to 8.1% for PIMS-integrated users (excluding Digitail). That is roughly a twelve-fold difference, and it suggests that scribe-focused products rarely fail their users, while PIMS-integrated offerings produce a meaningful tail of actively unhappy adopters.

Among the individual PIMS-integrated products, Digitail's built-in scribe shows a mean of 6.20 (n=5), though the sample is far too small for statistical confidence. The Covetrus & IDEXX platforms (Neo AI, Pulse/Covetrus AI, ezyVet AI) cluster around 4.3–4.4, suggesting their scribe features are viewed as adequate but mediocre by users who have adopted them.

What Customers Are Saying: Representative Comments

The open-ended survey comments bring the satisfaction data to life. Keyword-based theme analysis of 340 scribe-focused comments and 41 PIMS-integrated comments reveals that scribe-focused users generate a 2.8:1 positive-to-negative theme ratio, while PIMS-integrated users produce a 1.3:1 ratio, more than twice the enthusiasm per frustration. The following five comments, drawn from actual survey responses, illustrate the contrast:

Scribe-focused

Co.Vet (Scribe-Focused): *"Covet has made record writing a breeze. I love it so much, especially for complicated appointments"*

ScribbleVet (Scribe-Focused): *"Once I fine tuned my templates, it is amazing. The only con is the cost!"*

ScribeNote (Scribe-Focused): *"This has been one of the greatest advancements in veterinary medicine from an everyday impact tool. I have been able to get all of my notes done, it's so easy to use, and it has generally changed my life for the better because now I do not have to worry about if I missed something in the notes or not having enough time to write them after a long shift."*

PIMS scribes

ezyVet AI (PIMS-Integrated): *"Convenient to have a reference for finishing notes at a later time but do not like the formatting or lack of ability to set a format for the notes created by AI. I still type my notes manually, just use the generated text as a reference."*

Vetspire AI (PIMS-Integrated): *"It helps record the conversation, but can be redundant, pick up on owner cues and deviate away from the veterinary importance, it also can be very lengthy and overwhelming to read through. You have to give it 'rules' which can be confusing, and it will often change its formatting randomly. We have had many bugs where it doesn't record, or mixes records together."*

The pattern across hundreds of comments is consistent: scribe-focused users describe products that feel polished, customizable, and purpose-built for veterinary workflows. PIMS-integrated users more frequently describe tools that capture content but produce poorly structured output: information placed in the wrong SOAP section, verbose notes requiring heavy editing, and AI that does not learn from corrections.

The sentiment data reinforces the quantitative satisfaction gap and suggests it reflects genuine product quality differences, not merely sampling artifact.

Comment Theme Analysis: Where the Gaps Are Largest

A keyword-based theme analysis of the open-ended satisfaction comments quantifies the qualitative patterns underlying the sentiment gap. The following tables present the frequency of positive and negative themes across the 340 top-4 scribe-focused comments and 41 PIMS-integrated comments.

Table 6: Positive Comment Themes: Scribe-Focused vs. PIMS-Integrated

Positive Theme	Top 4 Scribe-Focused (n=340)	PIMS-Integrated (n=41)	Delta (pts)
Customizable / Templates	53 (16.8%)	1 (2.4%)	**+14.4**
Easy to use / User-friendly	72 (22.9%)	4 (9.8%)	**+13.1**
Good accuracy	58 (18.4%)	5 (12.2%)	**+6.2**
Good quality notes/records	15 (4.8%)	0 (0.0%)	**+4.8**
Good PIMS integration	25 (7.9%)	2 (4.9%)	+3.1
Saves time / Fast	31 (9.8%)	3 (7.3%)	+2.5
Improves workflow	8 (2.5%)	0 (0.0%)	+2.5
Love it / Highly positive	45 (14.3%)	5 (12.2%)	+2.1

The largest positive-theme gaps favor the scribe-focused offerings on customizability (+14.4 percentage points) and ease of use (+13.1 points), the two attributes most closely tied to dedicated product investment and iterative user feedback.

Accuracy praise is also meaningfully higher (+6.2 points), consistent with the experience-curve dynamic described in Finding 4.

Table 7: Negative Comment Themes: Scribe-Focused vs. PIMS-Integrated

Negative Theme	Top 4 Scribe-Focused (n=340)	PIMS-Integrated (n=41)	Delta (pts)
Inaccurate / Errors	29 (9.2%)	4 (9.8%)	–0.5
Slow / Glitchy / Crashes	23 (7.3%)	4 (9.8%)	–2.5
Requires heavy editing	19 (6.0%)	1 (2.4%)	+3.6
Incomplete capture	10 (3.2%)	1 (2.4%)	+0.7
Verbose / Too wordy	9 (2.9%)	3 (7.3%)	–4.5
Expensive / Cost concerns	8 (2.5%)	0 (0.0%)	+2.5
Difficult to learn	7 (2.2%)	2 (4.9%)	–2.7
Privacy / Trust concerns	4 (1.3%)	0 (0.0%)	+1.3
Poor PIMS integration	4 (1.3%)	0 (0.0%)	+1.3

PIMS-integrated scribes draw disproportionately more complaints about verbosity (–4.5 points), difficulty learning (–2.7 points), and glitchiness (–2.5 points). These three negative themes reinforce the qualitative pattern described above: output that requires substantial manual cleanup before it is clinically usable. Accuracy complaints are shared at near-identical rates (~9–10%), suggesting this is a category-wide AI challenge rather than a differentiator between scribe-focused and PIMS-integrated offerings.

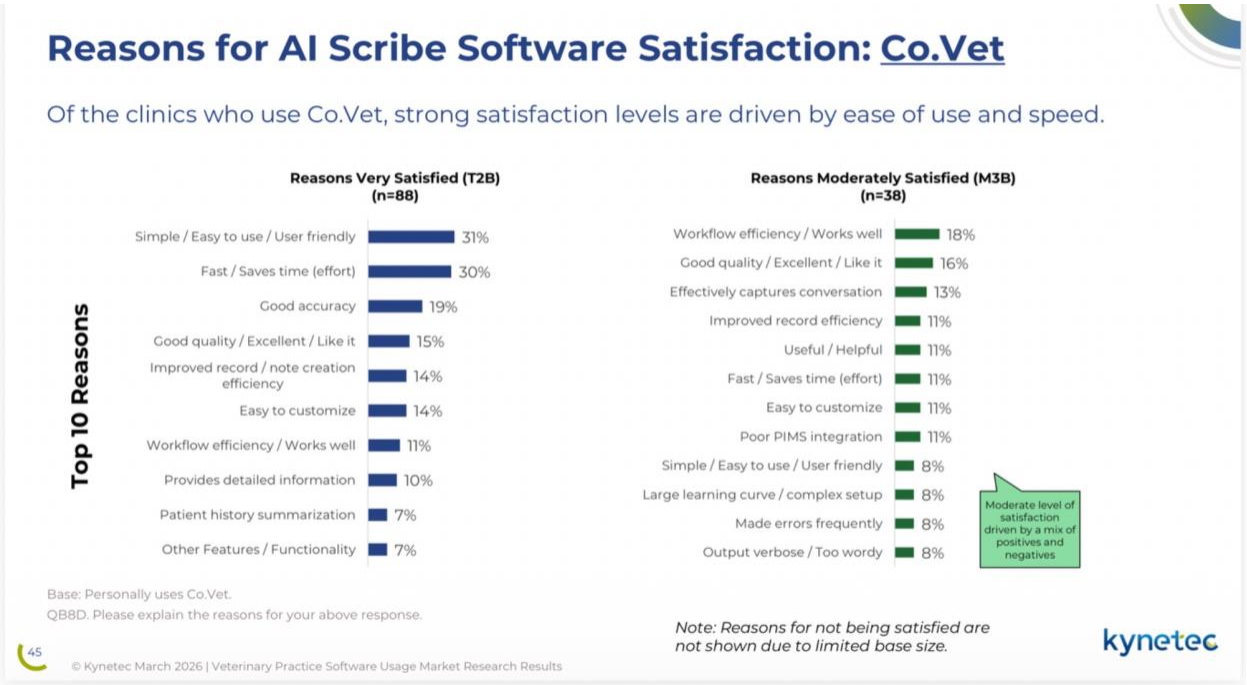
Individual Scribe Vendor Profiles: The Top Three

The three leading scribe-focused vendors (Co.Vet, ScribbleVet, and ScribeNote) collectively command two thirds of North American weighted market share and account for 316 of the 335 top-four scribe satisfaction comments in the ASIPS survey. Each has built a distinct user base and product identity. The following profiles present their satisfaction distributions and the reasons users cite for their ratings, drawn directly from the Kynetec survey data.

Co.Vet

Co.Vet holds the highest mean satisfaction score (5.91 out of 7) among the top three, with 70% of its 127 users rating satisfaction at 6 or 7 and zero users expressing dissatisfaction (Bottom 2 Box = 0.0%). This profile (strong enthusiasm with no detractors) is exceptional in veterinary software. Co.Vet's dominance in Canada (70.6% weighted share) drives much of its installed base, though its US presence (14.5% share) is growing.

Among the 88 highly satisfied Co.Vet users (T2B), ease of use (31%) and time savings (30%) are the dominant positive themes. Both are substantially higher than for ScribbleVet or ScribeNote on the same measures. Accuracy praise (19%) rounds out the top three. Among the 38 moderately satisfied users, poor PIMS integration appears at 11%, confirming that even satisfied Co.Vet users identify the integration gap as a notable limitation. Workflow efficiency (18%) leads moderate-satisfaction reasons, suggesting these users see the product's potential but experience friction that prevents full enthusiasm.

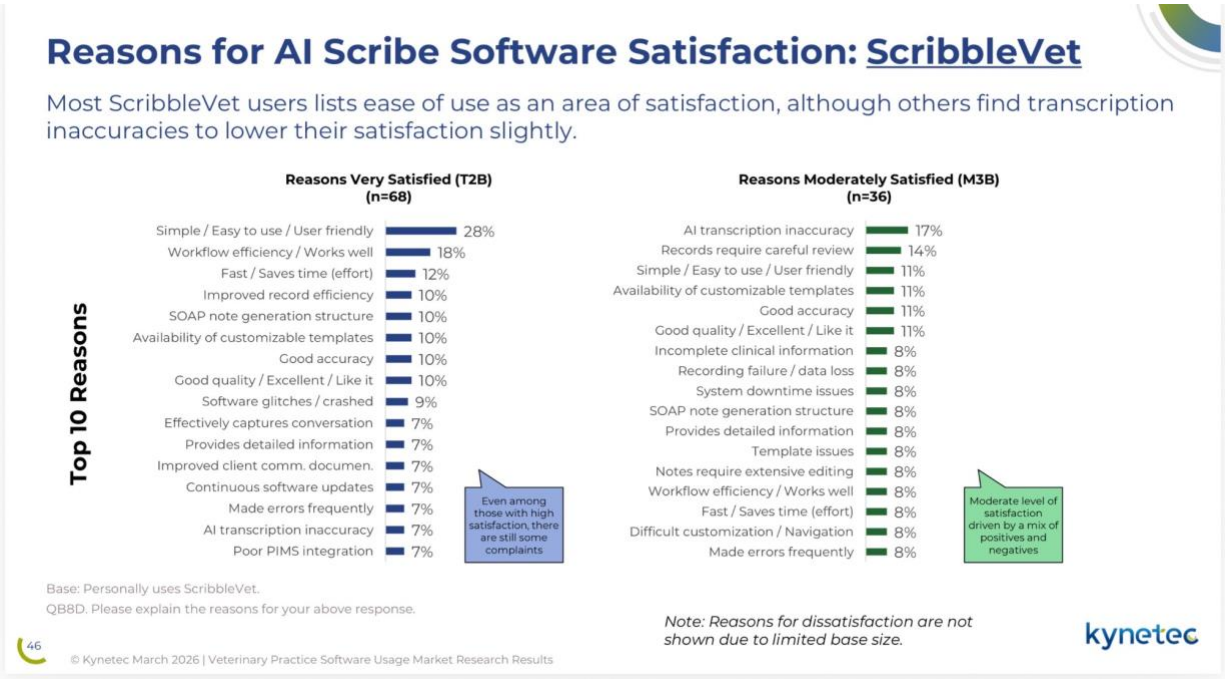


Source: ASIPS/Kynetec (QB8D). Base: Personally uses Co.Vet. T2B = Top 2 Box (Satisfaction 6+7). M3B = Mid 3 Box (Satisfaction 3–5). Percentages of respondents citing each reason.

ScribbleVet

ScribbleVet leads North America in weighted market share (24.8%), built almost entirely on US adoption (29.0% US share). Its 104-user satisfaction sample yields a mean of 5.82 out of 7, with 65% top two boxes and, like Co.Vet, zero dissatisfied users (bottom two boxes = 0.0%). (On its January 2026 acquisition by Instinct Science and the open-integration commitments, see Finding 4 above.)

ScribbleVet's satisfaction drivers are more evenly distributed than Co.Vet's. Ease of use leads (28%) but is followed closely by workflow efficiency (18%), time savings (12%), and a cluster of attributes at 10%: record efficiency, SOAP note structure, customizable templates, accuracy, and overall quality. This breadth suggests a product perceived as strong across multiple dimensions rather than dominant on one. Among moderately satisfied users (n=36), transcription inaccuracy (17%) and the need for careful record review (14%) are the leading concerns. Poor PIMS integration appears at 7% among even the highly satisfied. This is a notable signal that integration is on the mind of ScribbleVet's most enthusiastic users.

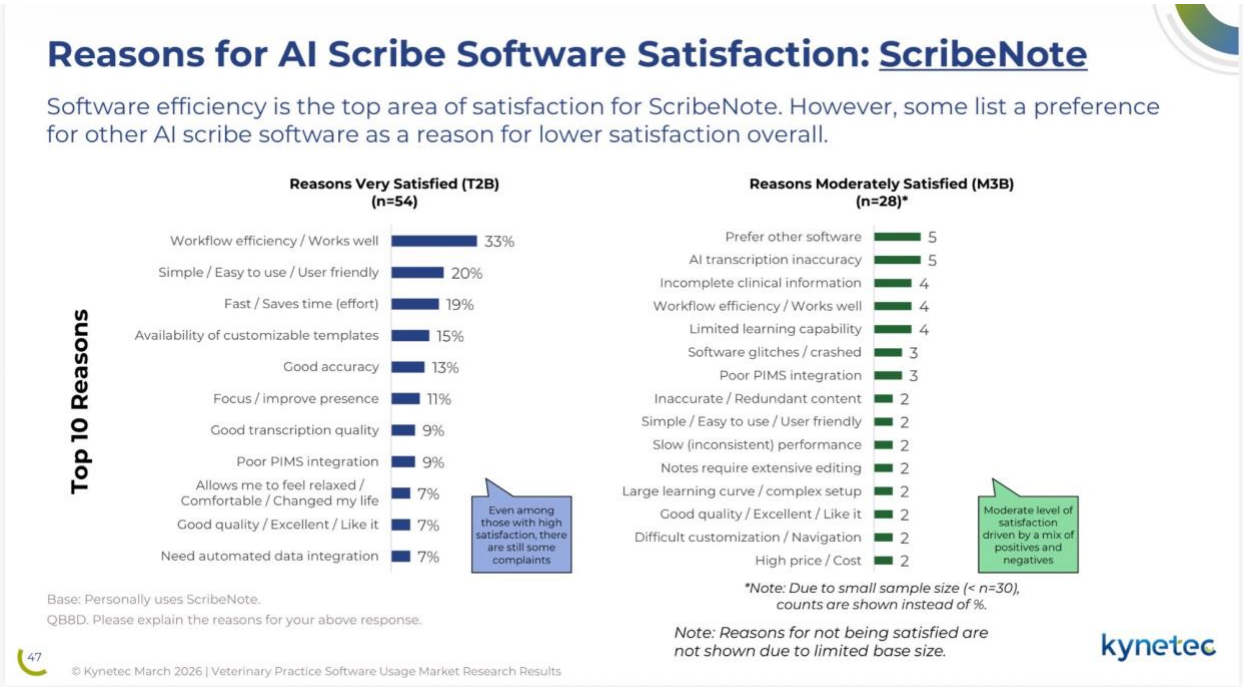


Source: ASIPS/Kynetec (QB8D). Base: Personally uses ScribbleVet. T2B = Top 2 Box (Satisfaction 6+7). M3B = Mid 3 Box (Satisfaction 3–5). Percentages of respondents citing each reason.

ScribeNote

ScribeNote ranks third in North American weighted share (19.3%), with a strong US base (20.9% share) anchored in part by its corporate deployment at Mission Pet Health. Its 85-user satisfaction sample yields a mean of 5.64 out of 7 and 64% top two boxes. ScribeNote is the only top-three vendor with any bottom 2 box dissatisfaction (2.4%), though this remains immaterial. Its satisfaction profile is solid but slightly below Co.Vet and ScribbleVet on every metric.

ScribeNote's satisfaction drivers reveal a product valued primarily for workflow efficiency (33%) and ease of use (20%), similar to Co.Vet's pattern. Time savings (19%) and customizable templates (15%) round out the top four. Among moderately satisfied users (n=28), preference for other software (5 mentions) and AI transcription inaccuracy (5 mentions) lead. Notably, some ScribeNote users are aware of alternatives they consider superior. Poor PIMS integration appears among both highly satisfied (9%) and moderately satisfied (3 mentions) users, making ScribeNote the vendor whose users most frequently cite integration as a concern in their satisfaction comments. This is consistent with the 19.3% keyword rate noted above.



Source: ASIPS/Kynetec (QB8D). Base: Personally uses ScribeNote. T2B = Top 2 Box (Satisfaction 6+7). M3B = Mid 3 Box (Satisfaction 3–5). Due to small sample size (< n=30), counts shown for M3B instead of percentages.

Across all three vendors, the satisfaction data tells a consistent story: these are products that clinicians find genuinely valuable, with satisfaction levels well above what PIMS-integrated scribes achieve. The differences between the three are matters of degree, not kind. The most common improvement request, appearing organically in satisfaction comments for all three, is deeper PIMS integration, particularly the ability to write completed notes directly into the medical record without copy-and-paste. This is not a product deficiency; it is a workflow gap that requires PIMS vendor cooperation to close.

Finding 5: PIMS Integration Will Become a Scribe Expectation Soon

Today, most AI scribes operate as standalone applications: recording audio, generating SOAP notes, and leaving the clinician to copy and paste the output into their PIMS. This workflow works, and it is why adoption has reached 47% without deep integration. But it leaves significant additional value on the table.

Elsewhere in the ASIPS survey (Part VI), 87% of practices rate *as important* Independent Software Vendor (ISV) read or write access to their PIMS data, including by scribes. Fewer than 4% of practices affirmatively rate both read and write-back access as unimportant.

For scribes specifically, read access means the scribe can pull patient history, medication records, and prior visit context *before* the appointment begins. This enables pre-visit preparation that transforms the scribe from a note-taker into a clinical workflow tool.

Write-back access means the completed SOAP note flows directly into the medical record after doctor review, editing, and approval, without a manual cut-and-paste operation. This closes the loop and delivers the full time savings that scribe technology promises.

See the detailed analysis in Part VI of this series,[6] which also reviews the specific barriers to PIMS integration: absent APIs, access fees, complicated and time-consuming processes, NDAs, and selective exclusion.

The experiences of scribe innovators (as well as many others) in attempting to establish read and write PIMS integration with the 14 leading PIMS will be documented in detail in a future chapter of this series, coming in the next week or two.

What Scribe Users Say About PIMS Integration: Ten Representative Voices

The scribe satisfaction comments collected in the ASIPS survey contain dozens of unsolicited references to PIMS integration. These users, when asked simply to explain their satisfaction rating, volunteered that integration with their practice management system was either a significant gap or a valued capability. The following ten comments, drawn from users of the four leading scribe-focused vendors, illustrate both directions of the integration need: writing completed notes back into the PIMS, and reading patient context from it.

Write-Back to PIMS: Seven Comments on the Desire to Send Notes Directly into the Medical Record

These respondents describe a consistent pattern: the scribe itself works well, but the last mile (getting the finished note into the PIMS without manual copy-and-paste) remains an unresolved friction point.

> **ScribbleVet** (US, Satisfaction: 6/7): *"Very costly for multiple use DVMs, does not immediately write back to PIMS."*
>
> **ScribbleVet** (US, Satisfaction: 5/7): *"Quite accurate, even with multiple pet appts, customizable templates. I just wish it integrated right into Cornerstone rather than cut and paste."*
>
> **Co.Vet** (US, Satisfaction: 6/7): *"Pretty easy to use after the initial learning curve, nice setup, does a better job than the other 4 AI scribes I've tried of capturing what is said and assimilating, has the use of personalization of mis-spellings etc into a correct term, easy for team to use and set up for the doctor at check-in. I would like it to integrate with Pulse so I don't have to copy and paste."*
>
> **Co.Vet** (Canada, Satisfaction: 6/7): *"Amazing software! Wish it could integrate into Neo."*

[6] Part VIII of this series will go into far more detail on the PIMSs' headwinds and barriers faced from the perspective of the ISV.

> **ScribeNote** (US, Satisfaction: 7/7): *"It has all the functionality I want except full integration with our PIMS, so records are still manually transferred."*
>
> **ScribeNote** (US, Satisfaction: 7/7): *"Easy to use. Good complete notes. Reviewing is important but only have had to correct very few notes. Wish it automatically downloaded into Avimark."*
>
> **VetRec** (US, Satisfaction: 5/7): *"Occasionally will not record, integration with PIMS is inconsistent."*

Read from PIMS: Three Comments on the Value of Pulling Patient Context into the Scribe

A smaller but revealing set of comments highlights the other direction of integration: the scribe's ability to read patient history, prior visit notes, and uploaded records from the PIMS. These users already see value in record-review features and implicitly confirm the demand for deeper read access that would allow pre-visit preparation and context-aware note generation.

> **Co.Vet** (US, Satisfaction: 4/7): *"I appreciate and mostly use the AI previous medical record summary generator. Helps with efficiency for new client/patient exams."*
>
> **ScribbleVet** (US, Satisfaction: 6/7): *"ScribbleVet is very good at filtering out information it captures that is not relevant to the appointment so I usually only have to make very minor edits to my SOAP. It keeps a progressive history/summary the more times I use it with a particular patient. It has a chat feature for the audio transcript and any imported records and can also do a chronologic or problem-based summary of uploaded records."*
>
> **ScribeNote** (US, Satisfaction: 5/7): *"Very helpful for client callbacks and history. Inconsistent with actually gathering PE information and logging it correctly. Often 'glitches' or has periods where it is slow to process and create the records, therefore slowing down my ability to edit and upload them into my PIMS."*

The pattern is clear: users of the leading scribe-focused vendors are already asking for both directions of PIMS integration.

A keyword analysis of all 335 open-ended satisfaction comments from users of the top four scribe-focused vendors finds that 49 (14.6%) spontaneously reference PIMS integration: mentioning the desire for write-back, frustration with copy-and-paste, or the wish for direct connection to their practice management system, even though the question asked only to explain their satisfaction rating, not about integration. ScribeNote users raise the issue most frequently (19.3% of comments), followed by ScribbleVet (13.9%) and Co.Vet (13.5%).

The write-back demand is more frequently articulated. The copy-and-paste workaround is a daily friction. The read-access demand, while less often stated explicitly, reflects a deeper strategic opportunity. A scribe that can read patient context before the appointment becomes a fundamentally different product: not merely a note-taker, but a clinical preparation tool.

Both directions require the PIMS to provide API access that many vendors have been slow to offer, a subject Part VI of this series examined in detail and will be the further topic of a future part of the series.

Analysis and Potential Implications

The speed of scribe adoption is striking. In Part III, published just seven weeks ago, we estimated 20–25% of veterinarians had subscriptions. The ASIPS data, collected over the same period, shows 47% of clinical staff personally using a scribe. That is roughly double the estimate. The gap may reflect the difference between subscription counts (which miss corporate deployments and shared accounts) and actual personal usage. However, before ASIPS there was simply no reliable research data on the question, just conjecture.

The focused independent scribe vendors hold a commanding lead in adoption, satisfaction, capability and installed base. All four market leaders (ScribbleVet, Co.Vet, ScribeNote and VetRec) are scribe-focused, collectively holding nearly three quarters (72.7%) of North American share of scribes in use.

PIMS vendors offering embedded scribes have achieved single-digit *aggregate* share, and 1% to 2% individual share, despite the theoretical advantage of integration. This suggests that product quality, clinical accuracy, and speed of innovation matter more than convenience of bundling, at least at this stage of the market.

Integration will increasingly matter. As scribes evolve from standalone software tools into clinical workflow platforms (reading patient history, preparing pre-visit summaries, generating client communications, and supporting clinical decision-making), the question of PIMS access becomes central.

But this third-party ISV integration is a much larger issue than just for scribes. It is the central structural question for every veterinary PIMS over the next six months. As AI agents begin to act directly on behalf of clinicians and practice owners, the PIMS that is open and accessible becomes the platform everything else connects to. The one that is closed gets routed around. More on this in the chapters ahead.

Perhaps this experienced advice to founders is relevant in this context:

> “Jason Calacanis, you mentor tons of startups. David Sacks, you have done it. David Friedberg has done it. I do it.
>
> “What is the one thing we tell folks? *Focus, focus, focus,* 100%! Do *one,* maybe one and a half things, but do it incredibly, incredibly well, and everything else, you start to bleed and smear.
>
> “It is the Brad Garlinghouse famous “Peanut Butter Manifesto” from 2006. You spread the peanut butter too far out.”
>
> Chamath Palihapitiya, All-In Podcast, March 27, 2026 (paraphrased)

Survey Methodology and Statistical Notes

The data in this paper, from a survey entitled ASIPS (Ayers Software in Practice Survey), is drawn from the Kynetec Veterinary Practice Software Usage Market Research Study (PRJ17655).

The survey consisted of a 15-minute online questionnaire conducted among a dedicated panel of veterinary professionals between **January 13 and March 4, 2026.** The study was

commissioned by Jon Ayers in November of 2025 and fielded by Kynetec, a global research firm specializing in animal health and agriculture. The full questionnaire utilized was provided as an appendix to CAVSG Pt VI.

The total validated sample comprises **1,273 practices**: 1,057 in the United States and 216 in English-speaking Canada (Quebec was excluded because the survey was conducted in English only).

Respondent screening. To qualify, respondents were required to be a companion animal veterinarian, veterinary technician (RVT/LVT/CVT), practice manager, or other practice staff member; to be familiar with or knowledgeable about all software used in the clinic; and to be located in the US or Canada (excluding Québec).

Only one respondent was permitted per practice. Clinical staff, as the primary user base for AI scribe technology, are defined as veterinarians (practice owners/partners and associate/employed veterinarians) and veterinary technicians present in exam rooms during patient consultations.

Mars Veterinary Health exclusion. Practices operating under the Mars Veterinary Health umbrella, including VCA Animal Hospitals, BluePearl Specialty and Emergency, and Banfield Pet Hospital, were purposely excluded from the study.[7] These organizations enforce standardized internal practice management systems across their networks and operate as a closed ecosystem with respect to software selection. Their inclusion would distort both the PIMS market share analysis and the scribe adoption data, as individual practice-level software choice is not applicable within these groups. Mars Veterinary Health collectively operates approximately 2,200 US and Canada locations across its three brands.[8] Their exclusion should be considered when interpreting the practice-level adoption figures.

Market-size weighting. All market share figures in this paper are weighted by practice count to reflect actual country market size rather than raw survey proportions. The weighting uses third-party data to establish the practice population in each country, then applies weight factors so that each survey respondent represents a proportional share of their national market.[9] The

[7] Some VCA Woofware users managed to make it into the study, regardless.

[8] Mars Veterinary Health location estimate: Banfield Pet Hospital operates “more than 1,000” hospitals in the US and Puerto Rico (banfield.com/about-banfield). VCA Animal Hospitals operates “more than 1,000” hospitals across the US and Canada (vcahospitals.com/about-us; AVMA, “VCA launches urgent care hospitals,” 2022, reporting “more than 1,000 hospitals across 46 states and five Canadian provinces”). BluePearl Specialty and Emergency Pet Hospital operates approximately 100 locations in the US (BluePearl Facebook page; Fortune, “Candy maker Mars is the biggest vet provider in the country,” January 2025, noting BluePearl “has nearly doubled to about 100 hospitals”). The combined US and Canada total is approximately 2,100–2,300 locations. Mars Veterinary Health’s frequently cited “nearly 3,000” figure is a worldwide total that includes European operations (AniCura, Linnaeus) and other international brands (Fortune, January 2025).

[9] Market-size weighting calculation: The US practice count of 30,000 is drawn from converging industry estimates (range: 30,000–32,000); the conservative end of the range was used. For Canada, the Canadian Veterinary Medical Association reports 4,694 total veterinary practices nationally (CVMA, 2024). Because the survey was conducted in English only and excluded Quebec, Quebec’s 23% share of Canadian practices (Statistics Canada Census, 2021) was removed from the weighting base, yielding 3,614 English-speaking Canadian practices. Weight factors were then calculated as: US weight = 30,000 practices ÷ 955 US clinical staff respondents = 31.41; Canada weight = 3,614 practices ÷ 209 Canadian clinical staff respondents = 17.29. Each US respondent thus receives 1.82× higher weight than each Canadian respondent (31.41 ÷ 17.29), reflecting the US market’s 8.3:1 size advantage. Weighted brand users are calculated as: (unweighted US users × 31.41) + (unweighted Canada users × 17.29). Market

resulting US:Canada weighting ratio is 8.3:1, reflecting the US market's dominant share of the English-speaking North American practice population. This ratio is different than the ratio of respondents, which overweights Canada.

Without proper weighting, Co.Vet would appear to lead North America at 34.4% simple-average share (driven by its Canadian dominance), when the actual market-size-weighted position is second at 23.0%. Adoption rates throughout this paper are unweighted survey percentages. Multiple product use is permitted; brand percentages may sum to more than 100%. (Note: Co.Vet is an independent scribe vendor, not affiliated with Covetrus despite the name similarity.)

Margin of error and significance testing. At the 95% confidence level, the maximum margin of error for the full base of each key subgroup is as follows:

Subgroup	Sample (n)	Margin of Error
Total Sample	1,273	**±2.75%**
Total US	1,057	**±3.02%**
Total Canada	216	**±6.68%**
US Independent Clinics	715	**±3.67%**
US Corporate Clinics	325	**±5.44%**

Where individual product sample sizes fall below n=30, counts are shown in place of percentages and significance testing is not applied; grouped figures are directional.

Appendix: The Strategic Logic of Compounding AI Advantage

Finding 4 of this paper observes that focused scribe vendors hold a compounding strategic advantage over PIMS vendors entering the scribe category. This appendix traces the intellectual lineage of that observation, from its origins in manufacturing strategy through its application to AI-native software markets.

The Experience Curve

The experience curve thesis, first articulated by Bruce Henderson at the Boston Consulting Group in 1968, holds that unit costs decline by 20 to 30 percent each time cumulative production experience doubles. Unlike the older "learning curve" (which applied only to labor inputs), Henderson's insight encompassed all costs, including production, distribution, and administration, and the effect persisted as cumulative volume grew. The strategic implication was that market share leadership confers a self-sustaining cost advantage. Increased activity

share for each brand equals its weighted total divided by the sum of all brands' weighted totals. For example, ScribbleVet: (100 US users × 31.41) + (1 Canada user × 17.29) = 3,159 weighted users ÷ 12,628 total = 25.0% market share.

leads to increased learning, which leads to lower costs and better products, which in turn leads to greater market share and further dominance.

Henderson's research, initially conducted for a semiconductor manufacturer, found that unit production costs declined by 20–30% each time cumulative production experience doubled. His work was reprinted in *The Boston Consulting Group on Strategy: Classic Concepts and New Perspectives*, 2nd ed., Carl W. Stern and Michael S. Deimler, eds. (Wiley, 2006).

The AI Data Flywheel

Applied to AI-native software categories such as veterinary scribing, the experience curve operates through clinical data rather than manufacturing volume. Each additional appointment transcribed generates feedback, including physician corrections, template refinements, terminology patterns, and species-specific vocabulary, that compounds into higher accuracy, better SOAP note structure, and richer feature sets.

In AI, this dynamic is known as the "data flywheel": a self-reinforcing cycle in which a product's adoption generates user data that improves the model, which enables further adoption. Gurkan and de Véricourt formalize the "AI Flywheel effect" in their 2022 paper, demonstrating that this feedback loop fundamentally shapes pricing, contracting, and competitive dynamics. (Gurkan, H. and de Véricourt, F. "Contracting, Pricing, and Data Collection Under the AI Flywheel Effect." *Management Science* 68, no. 12 (2022): 8791–8808.)

Empirical Confirmation at Enterprise Scale

BCG's own longitudinal research confirms the compounding dynamic at the enterprise level. Based on a global study of 1,250 companies, BCG found that "future-built" AI leaders achieve 1.7 times the revenue growth, 3.6 times the three-year total shareholder return, and 1.6 times the EBIT margin of laggards. Future-built companies reinvest returns into enhanced capabilities, creating what BCG describes as "virtuous cycles of accelerating performance while laggards face vicious cycles of constrained investment." (Apotheker, J., et al. *The Widening AI Value Gap: Build for the Future 2025*. Boston Consulting Group, September 2025.)

Application to the Veterinary Scribe Market

The focused scribe vendors, with their larger installed bases, have accumulated far more of these clinical improvement cycles than PIMS vendors whose scribe modules represent one feature among many. The PIMS vendors face a compounding disadvantage: they are allocating their finite development resources across dozens of product categories (scheduling, billing, inventory, reminders, client communications) while simultaneously trying to build competitive scribe functionality from a standing start. The focused vendors, by contrast, have concentrated all of their engineering, product, and clinical-feedback resources on scribing alone, and they started years earlier. The result is the same pattern Henderson identified in manufacturing: the leaders' cumulative experience produces a product quality advantage that widens over time, not narrows.

The satisfaction data presented in the body of this paper, a twelve-fold dissatisfaction gap between PIMS-integrated and scribe-focused offerings, is consistent with this framework. The focused vendors' head start in cumulative clinical feedback loops has translated into measurably superior product quality, exactly as the experience curve would predict.