5W AI VISIBILITY INDEX

The Local Services AI Visibility Crisis 2026

National Chains, Aggregators, and the 78% Independent Invisibility Gap.

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EXECUTIVE SUMMARY

Local services is the largest sector of the American consumer economy that AI engines treat as if it barely exists. The plumber, the electrician, the personal injury lawyer, the family doctor, the dentist, the HVAC contractor — together these six categories employ tens of millions of Americans and account for hundreds of billions of dollars in annual consumer spending. And yet across the 60 metro-category combinations 5W tested in Q1 2026, an estimated 78% of independent local operators have effectively zero AI citation share. The same 22% who do appear are overwhelmingly the same handful of national chains and platform aggregators in every metro.

This is the AI visibility crisis the local-services category does not yet realize it has. 5W ran 320+ consumer-intent prompts across 10 U.S. metros and six service categories through ChatGPT, Claude, Perplexity, and Google AI Overviews in Q1 2026, tracking citations across national chains, platform aggregators, multi-location regional firms, and independent operators.

The findings: Roto-Rooter dominates plumbing-and-emergency citations across virtually every metro. Mr. Rooter, with 250+ U.S. and Canadian locations under the Neighborly umbrella, is the durable second. Morgan & Morgan — "America's Largest Injury Law Firm" with 1,000+ lawyers across 50 states and a $350M annual marketing budget — wins personal injury law citations at consistency rates that competitor firms cannot match. Aspen Dental and One Medical capture dental and family-medicine citations respectively at scale. Yelp, Angi, and Thumbtack collectively capture more aggregate citations than every national service chain combined. Zocdoc and Healthgrades dominate the healthcare-finder citation surface. Independent operators with deliberate entity-strength infrastructure occasionally break into AI citations — but the median independent local operator has effectively zero AI citation share in their own metro, in their own category, in 2026.

The brands that win the local-services AI citation surface in the next twelve months will define how the next decade of American consumers find service providers. The independents that don't build entity-strength infrastructure will be structurally locked out of a category their forebears built.

TOP 15 BRANDS BY AI CITATION SHARE ACROSS LOCAL SERVICES

Estimated share of citations across 320+ local-services consumer prompts run through ChatGPT, Claude, Perplexity, and Google AI Overviews, Q1 2026.

Yelp	9.0%
Roto-Rooter	7.5%
Angi	7.0%
Zocdoc	5.5%
Morgan & Morgan	5.0%
Healthgrades	4.5%
Mr. Rooter	4.0%
Aspen Dental	4.0%
Thumbtack	3.5%
One Medical	3.0%
HomeAdvisor	2.8%
CityMD	2.5%
Justia	2.5%
Benjamin Franklin Plumbing	2.0%
MinuteClinic	2.0%

Color key: blue — platform aggregators. Green — plumbing/HVAC national chains. Orange — healthcare aggregators and chains. Gold — legal aggregators and firms. Purple — dental national chains.

Source: 5W analysis of AI-generated responses across ChatGPT, Claude, Perplexity, and Google AI Overviews, Q1 2026. Share represents estimated proportion of brand citations across 320+ tracked consumer prompts spanning 10 U.S. metros and six service categories. Remaining ~36% split across ranks 16–25, regional chains, and the small minority of independent operators who occasionally break into citations.

THE FULL TOP 25 RANKING

1. Yelp — Aggregator. The category-leading consumer-review aggregator. Wins "best [service] near me" citations across virtually every metro and category. AI engines treat Yelp as the "neutral" answer when consumer prompts include "best" or "near me" framing.

2. Roto-Rooter — Plumbing chain. The largest plumbing services provider in North America with 600+ franchisees and affiliates. Founded 1935. Wins virtually every "emergency plumber" and "drain cleaning" prompt at consistency rates approaching 80%.

3. Angi — Aggregator (formerly Angie's List). Strong citation share in home-services prompts, especially plumbing, HVAC, and electrical. Wins "find a contractor" prompts across most metros.

4. Zocdoc — Healthcare aggregator. The category-leading doctor-finder. Wins "find a doctor near me," "primary care doctor [metro]," and "dentist near me" prompts at industry-leading consistency.

5. Morgan & Morgan — Personal injury law. America's Largest Injury Law Firm. 1,000+ attorneys across 50 states and DC. Over $30B recovered for 700,000+ clients. $350M annual marketing budget produces citation density that competitor firms cannot match.

6. Healthgrades — Healthcare aggregator. Wins "doctor reviews," "best [specialty] in [metro]," and "find a specialist" prompts. Strong citation share in physician-comparison queries.

7. Mr. Rooter — Plumbing chain. Founded 1970. 250+ locations under the Neighborly umbrella. Wins regional plumbing prompts where Roto-Rooter has limited density.

8. Aspen Dental — Dental chain. The largest dental support organization in the U.S. by location count. Wins "affordable dentist near me" and "no-insurance dentist" prompts at consistency.

9. Thumbtack — Aggregator. Strong citation share in "find a [service]" prompts across multiple categories. Mobile-first interface produces strong AI citation share for "near me" prompts on mobile-context AI queries.

10. One Medical — Primary care chain. Amazon-owned. Membership-based primary care. Wins "concierge primary care" and "primary care subscription" prompts.

11. HomeAdvisor — Aggregator. Now part of Angi (IAC). Strong citation share in homeowner-service prompts despite the brand consolidation under Angi.

12. CityMD — Urgent care chain. Strong East Coast presence, especially New York. Wins urgent-care prompts in NY metro and adjacent geographies.

13. Justia — Legal aggregator. The dominant legal-information aggregator. Wins "find a lawyer in [metro]" prompts in jurisdictions where Justia has indexing depth.

14. Benjamin Franklin Plumbing — Plumbing chain. Authority Brands-owned. Strong franchise pipeline. Citation share concentrated in markets where the brand has multiple locations.

15. MinuteClinic — Walk-in healthcare. CVS-owned. Wins "walk-in clinic near me" and "minor illness clinic" prompts.

16. Avvo — Legal aggregator. Strong attorney-rating and review presence. Wins "lawyer reviews [metro]" prompts.

17. Mr. Electric — Electrical chain. Neighborly umbrella. Citation share in electrical-service prompts at consistency.

18. Western Dental — Dental chain. West Coast and Texas-focused. Strong citation share in California and Texas dental prompts.

19. Service Experts — HVAC chain. Citation share concentrated in HVAC-specific prompts.

20. Mister Sparky — Electrical chain. Authority Brands-owned. Wins "emergency electrician" prompts in markets with franchise density.

21. Heartland Dental — Dental chain. Operates branded and white-labeled dental practices. Citation share concentrated in markets where the brand operates under its own name.

22. ARS / Rescue Rooter — HVAC chain. Citation share in "AC repair near me" prompts in markets with franchise density.

23. 1-800-DENTIST — Dental aggregator. Wins "find a dentist" prompts that include phone-call-friendly framing.

24. Lawyers.com — Legal aggregator. Citation share in attorney-search prompts where Justia and Avvo do not have indexing depth.

25. WebMD Care — Healthcare aggregator. Citation share in "doctor near me" prompts adjacent to WebMD's general-health-information citation surface.

KEY FINDINGS

- **STAT 1:** 78% — estimated share of independent local operators across the 60 metro-category combinations 5W tested with effectively zero AI citation share
- **STAT 2:** 8x — estimated entity-strength multiplier (Wikipedia presence, Wikidata records, structured national-chain entity) for AI citation share; the largest signal effect in any category 5W has measured
- **STAT 3:** 600+ — Roto-Rooter franchisees and affiliates in the U.S. and globally; the largest plumbing services franchise network
- **STAT 4:** 250+ — Mr. Rooter franchisee locations across the U.S. and Canada under Neighborly
- **STAT 5:** 1,000+ — Morgan & Morgan attorneys across 50 states and Washington, D.C.; the largest U.S. personal injury law firm
- **STAT 6:** $30B — total recovered by Morgan & Morgan for 700,000+ clients; $350M annual marketing budget
- **STAT 7:** ~14,000 — estimated independent dental practices in the U.S. operating outside the Aspen Dental, Heartland Dental, and Western Dental national networks; nearly all invisible in AI citations
- **STAT 8:** Aggregator dominance — Yelp, Angi, Thumbtack, HomeAdvisor, Justia, Avvo, Lawyers.com, Zocdoc, Healthgrades together capture more citation share in "find a [service] near me" prompts than every national service chain combined

THE CENTRAL FINDING

Every other major American consumer category 5W has measured for AI citation share has at least some structural opportunity for independent or smaller operators to claim citation surface. Pickleball facilities can build content moats. Crypto exchanges can publish proof-of-reserves. Cannabis brands can publish state-specific compliance content. Beauty brands can publish ingredient transparency. Local services has none of these structural levers — or rather, the levers exist but require a category of brand-content investment that local independent operators historically have never made and structurally cannot match.

The result is the most consolidated AI citation surface 5W has measured. Across the 320+ prompts we ran in Q1 2026, AI engines surface a strikingly small set of brands repeatedly: a national chain in the category (Roto-Rooter, Mr. Rooter, Aspen Dental, Morgan & Morgan, One Medical, Service Experts), one or two platform aggregators (Yelp, Angi, Zocdoc, Justia), and occasionally one or two regional chains. The independent plumber, dentist, family doctor, or personal injury attorney — even one with strong local reviews and decades of operating history — typically does not appear in the answer at all.

The mechanism is structural, not coincidental. AI engines weight entity strength heavily — the cleanly identifiable, structured, repeated, citation-rich representation of a brand in training data. National chains and platform aggregators have entity strength: Wikipedia entries, Wikidata records, Bloomberg articles, business-press coverage, structured corporate disclosure. Independent local operators almost never have any of these. The asymmetry is approximately 8x — the largest entity-strength multiplier 5W has measured in any consumer category. A national chain with a Wikipedia entry, multi-state operating disclosure, and dozens of business-press articles produces approximately eight times the AI citation share of an independent operator with strong Yelp reviews and a Google Business Profile.

The strategic implication for the category is severe. The independent local-services operator who has built thirty years of customer relationships, family-business reputation, and community trust now competes for AI citation share against operators who built brand-content infrastructure deliberately. The community-trust assets do not transfer to AI citation share automatically. The independent operator's customer base — older, longer-tenured, less reliant on AI search — is aging out of the consumer market every year. The next-generation customer base — younger, AI-search-native, less geographically loyal — is being directed to the national chains and aggregators by default.

METHODOLOGY

5W analyzed more than 320 common consumer-intent prompts across six local-services categories and 10 U.S. metros — 60 distinct metro-category combinations. We identified which brands AI models consistently surface, which editorial and authoritative sources feed those citations, and how dramatically independent operators are excluded from AI answers compared to national chains and platform aggregators.

Categories tracked.

Plumbing (Roto-Rooter, Mr. Rooter, Benjamin Franklin Plumbing, Rooter-Man, regional chains, independents). **Electrical contracting** (Mr. Electric, Mister Sparky, regional chains, independents). **Personal injury law** (Morgan & Morgan, Cellino Law, Allen Allen Allen & Allen, regional firms, solo practitioners). **Family medicine and primary care** (One Medical, MinuteClinic, CityMD, Forward, regional chains, independent practices). **Dentistry** (Aspen Dental, Western Dental, Heartland Dental, 1-800-DENTIST, independents). **HVAC contracting** (Service Experts, ARS / Rescue Rooter, One Hour Heating & Air Conditioning, regional chains, independents).

Metros tracked.

New York, Los Angeles, Chicago, Houston, Phoenix, Philadelphia, San Antonio, San Diego, Dallas, Austin. The 10 largest U.S. metros by population, selected to control for metro-specific variation while producing a diverse citation surface.

Query types tracked.

Real-world consumer prompts including *"best plumber in [metro]," "plumber near me [neighborhood]," "emergency plumber [metro]," "best electrician in [metro]," "best personal injury lawyer in [metro]," "best family doctor in [metro]," "primary care doctor near me [metro]," "best dentist in [metro]," "emergency dentist [metro]," "HVAC contractor in [metro]," "AC repair near me [metro]," "highest rated [service] [metro]," "affordable [service] in [metro],"* and additional category-and-metro-specific variations.

Citation sources tracked.

National-chain content and franchise pages (corporate websites, location finders, franchise marketing pages), platform aggregators (Yelp, Angi, Thumbtack, HomeAdvisor, Justia, Avvo, Lawyers.com, FindLaw, Zocdoc, Healthgrades, WebMD Care), business press coverage (Forbes franchise lists, business journals, regional press), structured-data sources (Wikipedia, Wikidata, structured corporate disclosure), Google Business Profile content (where indexed), and consumer-review aggregators.

Important framing.

This study measures AI citation share for marketing and communications strategy purposes. It does not rank service providers on quality of service, customer outcomes, professional licensing, or suitability for specific needs. Service-provider decisions should be informed by direct verification of licensing, current customer reviews, and qualified referrals. AI citation share reflects the visibility of brands in AI answers, not the quality of work performed by any operator.

WINNERS

The platform-aggregator citation duopoly (Yelp, Angi, Zocdoc). Yelp, Angi, and Zocdoc together capture an estimated 21.5% of all local-services AI citations across the 320+ tracked queries. The aggregator advantage is structural: AI engines treat these platforms as neutral information sources rather than commercial recommendations, which earns them citation surface that direct service providers cannot win. Yelp wins broad "best [service] near me" prompts. Angi wins home-services prompts specifically. Zocdoc wins healthcare-finder prompts. The three-platform aggregator citation tier is meaningfully separated from individual service-provider brands and from the next-tier aggregators.

Roto-Rooter's plumbing citation lock. Roto-Rooter wins virtually every "emergency plumber" and "drain cleaning" prompt at consistency rates approaching 80%. The mechanism is structural entity strength: Roto-Rooter has 90 years of operating history, 600+ franchise locations, a Wikipedia entry, dozens of business-press articles, and structured corporate disclosure. AI engines absorb this entity strength and surface Roto-Rooter as the default plumbing answer. The brand has effectively become the AI-era equivalent of "calling the plumber" — the generic-and-specific answer simultaneously.

Morgan & Morgan's personal-injury citation moat. Morgan & Morgan wins personal injury law citations at consistency rates that competitor firms cannot match. The mechanism is the firm's $350M annual marketing budget combined with structured nationwide presence (1,000+ attorneys, 50 states, $30B recovered, 700,000+ clients) and entity-strength signals (Wikipedia, billionaire-founder coverage, NIL endorsement deals, sports-sponsorship coverage in major media). The "For The People" slogan and Morgan family identity produce citation density that local solo-practitioner attorneys structurally cannot match. Morgan & Morgan has effectively done to personal injury law what Roto-Rooter did to plumbing — produced the citation-defining brand for the category.

Aspen Dental's affordable-dental citation lock. Aspen Dental wins "affordable dentist near me" and "no-insurance dentist" prompts at scale. The mechanism is the brand's positioning as the largest dental support organization by location count combined with consistent advertising and entity-strength signals. The independent affordable-dentistry positioning that competing dental practices have built in their local markets does not translate to AI citation share. Aspen Dental's citation moat compounds quarter over quarter.

One Medical and CityMD's primary-care citation positions. One Medical (Amazon-owned, membership primary care) and CityMD (urgent care, East Coast-focused) each occupy distinctive positions in primary-care AI citations. The Amazon acquisition of One Medical produced citation reinforcement that compounded the brand's existing entity strength. CityMD's New York-area dominance produces consistent citation share for NY metro urgent-care prompts. Independent primary-care practices and small group practices structurally do not compete in either citation surface.

FALLING BEHIND — THE INDEPENDENTS

Independent plumbers across all 10 metros. The independent plumber operating with 20-50 years of customer relationships, strong Yelp ratings, and a Google Business Profile typically does not appear in AI citations for "best plumber in [metro]" prompts. The citation surface routes to Roto-Rooter, Mr. Rooter, Benjamin Franklin Plumbing, and Yelp/Angi listings — the customer-facing answer is rarely the independent. Of approximately 50 independent plumbers across the 10 metros 5W tested, fewer than 10 appeared in any AI citation across the full prompt set.

Independent dentists outside the chain footprint. The U.S. has approximately 200,000 licensed dentists. The vast majority are independent or in small group practices. Across the 10 metros 5W tested, independent dental practices appear in AI citations at roughly 1/8 the rate of independent practices that have published structured content (Wikipedia entries, news coverage, dental association leadership, academic affiliations). The 8x entity-strength multiplier shows up most starkly in dental.

Independent personal injury attorneys outside the Morgan & Morgan footprint. Solo-practitioner and small-firm personal injury attorneys with significant local reputation, court experience, and customer reviews typically appear in AI citations only when prompts include attorney-name-specific framing or jurisdiction-specific niche framing. Generic "best personal injury lawyer in [metro]" prompts route to Morgan & Morgan and the platform legal aggregators (Justia, Avvo, Lawyers.com, FindLaw) before any independent attorney.

Independent family physicians. The U.S. has approximately 245,000 primary care physicians. The vast majority practice in independent or small-group settings. Across the metros 5W tested, independent primary care practices appear in AI citations at rates substantially below the citation share of One Medical, CityMD, MinuteClinic, and the healthcare aggregators (Zocdoc, Healthgrades, WebMD Care). The "find a primary care doctor" citation surface is being structurally consolidated around chain operators and aggregators.

Independent HVAC contractors. HVAC is the most consolidated of the home-services categories around national chains, regional aggregators, and equipment-brand-aligned dealer networks. Independent HVAC contractors face the steepest citation challenge — even strong local Google reviews do not reliably translate into AI citation surface for "best HVAC contractor in [metro]" prompts.

THE SIX STRUCTURAL FINDINGS

1. The 8x entity-strength multiplier is the largest signal effect 5W has measured in any consumer category. National chains and platform aggregators with Wikipedia presence, structured corporate disclosure, and business-press coverage produce approximately eight times the AI citation share of independent operators with strong local reviews and Google Business Profiles. The asymmetry is structural — not a function of relative service quality.

2. Platform aggregators (Yelp, Angi, Zocdoc) capture more aggregate citation share than every national service chain combined. AI engines route "find a [service] near me" prompts to aggregators rather than to direct service providers. The aggregator structural advantage in local services is the same advantage we observed in cannabis aggregators (Leafly, Weedmaps) and travel aggregators in adjacent categories. The pattern compounds.

3. The independent operator citation gap widens as AI search adoption grows. The next-generation customer base — younger, AI-search-native, less geographically loyal to long-established local businesses — defaults to whatever AI surfaces. The independent operator's customer base — older, longer-tenured, less reliant on AI search — is aging out every year. The citation gap is not stable; it is widening.

4. Local-services categories where the national chain has mass-media advertising compound citation share fastest. Roto-Rooter's century of advertising. Morgan & Morgan's $350M annual marketing budget. Aspen

Dental's national TV presence. The mass-media advertising signal feeds entity-strength signals in AI training data, producing compounding citation share that local advertising alone cannot generate.

5. Local-services categories without dominant national chains see citation share consolidate around aggregators alone. Where no Roto-Rooter-equivalent national chain exists in a category (some specialty trades, some healthcare specialties), citation share consolidates around the platform aggregators with even greater concentration. The category does not have a "national-chain alternative" — it has only the aggregator.

6. Independent operators with deliberate entity-strength infrastructure occasionally break into citations. The exception that proves the rule: independent operators who have Wikipedia entries, news coverage, professional-association leadership positions, or academic affiliations sometimes earn AI citation share. The exceptions are rare. Most independent operators have none of these and structurally cannot acquire them within their normal business operating budget.

2026-SPECIFIC FINDINGS

1. Morgan & Morgan's continued advertising scale and 2025 sports-sponsorship expansion compounded citation share. The firm's NIL endorsement deals, UFC and NHL sponsorships, and continued $350M annual marketing budget produced citation events that compounded the brand's entity strength quarter over quarter through 2025 and into 2026.

2. Amazon's continued investment in One Medical reset primary-care citation patterns. The 2023 Amazon acquisition of One Medical and the 2025 expansion of Amazon Pharmacy and Amazon Health adjacencies produced citation events. AI answers about "concierge primary care," "Amazon healthcare," and "primary care subscription" route to One Medical with growing consistency.

3. The Angi-HomeAdvisor consolidation under IAC has resolved enough that AI engines now cite Angi as the consolidated brand. The 2017 merger took several years to settle in AI citation patterns. By 2026, Angi appears more frequently than HomeAdvisor in home-services AI answers, though the HomeAdvisor citation residual remains.

4. Roto-Rooter's continued operational consolidation produced citation reinforcement. The brand's continued franchise-and-affiliate expansion, water-damage-restoration adjacency, and 24/7 service positioning produced citation events that compounded the existing entity strength.

5. Aspen Dental's continued location expansion (now exceeding 1,200 locations) hardened the affordable-dental citation moat. AI answers to "affordable dentist near me" and "dentist with no insurance" route to Aspen Dental at consistency rates that no other dental brand matches.

6. The independent local operator citation crisis is not yet on most operators' radar. Across the 60 metro-category combinations 5W tested, almost no independent operators have built deliberate entity-strength infrastructure. The citation gap is widening because the independents are not yet competing for citation share — most do not realize the citation surface has structurally moved away from them.

FROM RONN TOROSSIAN, FOUNDER OF 5W

> *"This is the local-services AI visibility crisis the category does not yet realize it has. Across 60 metro-category combinations we tested, 78% of independent local operators have effectively zero AI citation share. National chains and platform aggregators capture the rest. The plumber, the dentist, the personal injury attorney, the family doctor who built a thirty-year reputation in their community is now invisible in AI answers about their own category in their own metro. The asymmetry is approximately 8x — the largest entity-strength multiplier we've measured in any consumer category. This is not a marketing curiosity. This is the structural exclusion of the small-business backbone of the American consumer economy from the search surface that is becoming consumers' primary discovery tool. The brands that recognize the crisis and build entity-strength infrastructure now will win the next decade. The brands that do not will discover that the customer base they built generationally is being structurally redirected to operators with bigger marketing budgets."*
>
> **— RONN TOROSSIAN, FOUNDER & CHAIRMAN, 5W**

THE LOCAL SERVICES GEO PLAYBOOK

1. Audit AI citation share by metro and category. Independent operators need to know whether they appear in AI citations for "best [their service] in [their metro]" prompts. Most do not. The audit is the first step.

2. Build entity-strength infrastructure deliberately. Wikipedia entries (where notable enough), Wikidata records, structured-data markup on the operator's website, consistent NAP (name-address-phone) data across 50+ directories, and authoritative third-party citations (trade press, regional press, professional-association coverage) collectively produce the entity-strength signals AI engines weight heavily.

3. Pursue category-specific authoritative citations. The independent plumber should pursue trade-press coverage (Plumbing & Mechanical Magazine, regional plumbing-contractor association coverage). The independent attorney should pursue Bar Association leadership positions and Avvo / Justia / Super Lawyers verification. The independent dentist should pursue dental-association leadership and academic affiliations. The independent doctor should pursue medical-association leadership and academic affiliations. Each produces entity-strength signals AI engines absorb.

4. Build content that addresses the prompts AI engines route to chains and aggregators. "Emergency plumber [metro]," "best dentist for anxiety patients [metro]," "personal injury lawyer for [specific scenario] [metro]," "primary care doctor accepting new patients [metro]." Independent operators that publish content explicitly addressing the high-frequency citation prompts in their category and metro can break into citation surface that less-targeted content does not earn.

5. Win one specific niche surface deeply before competing broadly. The independent plumber who owns "tankless water heater [metro]" citation. The independent attorney who owns "trucking accident [state]" citation. The independent dentist who owns "sleep apnea dentistry [metro]" citation. Niche-specific citation moats are more achievable than general-category moats.

6. Pursue aggregator visibility actively. Yelp, Angi, Zocdoc, Justia, Avvo, Lawyers.com, Healthgrades, WebMD Care — independent operators should maintain consistent, current, comprehensive presence on every aggregator their category supports. The aggregators capture citation share that brand-owned content alone cannot generate. Independent operators benefit from being inside the aggregator surface even though the aggregator brand earns the citation.

7. Treat local press and association leadership as citation events. Local-business-press coverage, Chamber of Commerce leadership, professional-association board membership, community-foundation board membership all produce entity-strength signals that AI engines absorb. The investments are typically inexpensive relative to mass-media advertising and produce durable citation signals.

8. Build a content cadence that produces ongoing entity-strength reinforcement. A monthly substantive content publication on category topics (HVAC efficiency, dental anxiety, primary-care preventive medicine, plumbing winterization) reinforces entity-strength signals across years. The cadence matters more than any single piece of content.

9. Recognize the structural advantage that national chain affiliation can provide. Some independent operators may benefit from joining a national chain or franchise system specifically for the entity-strength inheritance. Mr. Rooter, Benjamin Franklin Plumbing, Mr. Electric, and Aspen Dental all offer this trade-off — operational independence in exchange for entity-strength inheritance and citation surface.

10. Treat AI citation share as a long-term strategic priority, not a marketing experiment. The citation gap is widening every quarter. Independent operators who treat entity-strength infrastructure as a multi-year investment build positions that compounding marketing-budget chains cannot easily displace. Independent operators who treat it as a quarterly marketing experiment cannot build the depth required to break the chain-and-aggregator citation lock.

THE BIGGER PICTURE

The American local-services category — plumbers, electricians, dentists, family doctors, personal injury attorneys, HVAC contractors — is the largest sector of the consumer economy that AI engines treat as if it barely exists. National chains and platform aggregators capture the vast majority of AI citations. Independent local operators capture an estimated 22% of citations across the 60 metro-category combinations 5W tested — and the gap is widening every quarter.

The implication for the category is severe and underappreciated. The plumber, dentist, family doctor, and attorney who built a thirty-year reputation in their community are now invisible in AI answers about their own category in their own metro. The customer base that knows them by reputation is aging out. The next-generation customer base, which defaults to whatever AI surfaces, is being directed to the national chains and aggregators by structural design.

The brands that win the next decade are the brands that recognize the structural asymmetry and build entity-strength infrastructure deliberately. Wikipedia entries, structured-data markup, authoritative third-party citations, professional-association leadership, academic affiliations, local press coverage, content cadence — each produces entity-strength signals that AI engines absorb. The investment cost is small relative to the mass-media advertising budgets the national chains deploy. The investment time is significant — multi-year, consistent, compounding.

The brands that treat the AI citation crisis as a marketing curiosity will watch Roto-Rooter, Morgan & Morgan, Aspen Dental, One Medical, Yelp, Angi, Zocdoc, and a small number of others absorb a larger and larger share of what consumers see when they ask AI *"who do I call for [my service need]"* across every American metro.

AI citation share is the scoreboard. In local services — uniquely among major American consumer categories — the scoreboard is structurally tilted against the small-business operators who built the category. The brands that recognize the tilt and build for it will compete. The brands that do not will be quietly excluded from the consumer-discovery surface their forebears took generations to earn.

ABOUT 5W

5W is a leading public relations and digital marketing agency, and the AI communications firm behind the AI Visibility Index Series. With a dedicated Generative Engine Optimization (GEO) practice, 5W helps the world's leading brands earn citation authority across ChatGPT, Claude, Perplexity, and Google AI Overviews while continuing to deliver the consumer, corporate, crisis, healthcare, technology, sports and lifestyle, and public affairs PR services that have made 5W one of the largest independent PR agencies in the United States.

The AI Visibility Index Series

The AI Visibility Index is 5W's research franchise measuring how generative AI engines surface brands in consumer search. Each Index covers a single consumer category — pickleball, crypto, cannabis, beauty, local services, the wedding industry, and others — and ranks the top 25 brands by AI citation share across ChatGPT, Claude, Perplexity, and Google AI Overviews. The Series exists because the citation surface is where consumer category formation now happens, and most brands do not yet realize the implications.

5W's Generative Engine Optimization Practice

5W's Generative Engine Optimization practice helps brands build durable AI citation share through entity-strength infrastructure, ingredient and credibility transparency content, structured editorial citation building, and the deliberate content cadence AI engines reward. Engagements include AI citation audits across ChatGPT, Claude, Perplexity, and Google AI Overviews; competitive citation-share benchmarking; entity-strength remediation including Wikipedia, Wikidata, structured-data markup, and authoritative third-party citation building; sub-category citation surface strategy; and ongoing citation-share measurement and reporting.

Category Expertise

5W operates dedicated practices across the categories the AI Visibility Index Series covers: Consumer Products & Brands, Cannabis PR & Digital Marketing, Beauty & Grooming, Health & Wellness, Financial Services & Fintech, Technology, Lifestyle, Travel & Hospitality, Food & Beverage, Home & Housewares, Crisis Communication, Litigation PR, Real Estate PR, Public Affairs, and more. Every AI Visibility Index produced by 5W is informed by category practice depth, not by category-agnostic methodology alone.

Engage with 5W

For inquiries about Generative Engine Optimization engagements, AI Visibility Index licensing, or category-specific PR and communications: visit 5wpr.com/practice/geo-optimization or contact info@5wpr.com. 5W headquarters: 469 7th Avenue, Floor 8, New York, NY 10018. Telephone: (212) 999-5585.

FAQ

What is the Local Services AI Visibility Crisis study?

A 5W research study of how generative AI engines treat U.S. local-services brands across six categories (plumbing, electrical, personal injury law, family medicine, dentistry, HVAC) and 10 U.S. metros. The study measures the structural asymmetry between national chains, platform aggregators, and independent operators in AI citations across ChatGPT, Claude, Perplexity, and Google AI Overviews.

What share of independent operators have effectively zero AI citation share?

An estimated 78% across the 60 metro-category combinations 5W tested. The asymmetry is the largest of any consumer category 5W has measured.

Which national chain ranks highest?

Roto-Rooter ranks #2 overall (behind only Yelp) and dominates plumbing-and-emergency citations. Morgan & Morgan ranks #5 overall and dominates personal injury law citations. Aspen Dental ranks #8 and dominates affordable-dental citations.

Which aggregator ranks highest?

Yelp ranks #1 overall in local services AI citations. Angi ranks #3, Zocdoc ranks #4. The three platform aggregators together capture an estimated 21.5% of all local-services AI citations.

How was AI citation share measured?

5W ran 320+ consumer-intent prompts across 10 U.S. metros and six service categories through ChatGPT, Claude, Perplexity, and Google AI Overviews in Q1 2026, then measured the frequency of brand citations across all responses. Citation share is the proportion of total brand mentions captured by each brand.

Why does AI citation share matter for local-services operators?

The next-generation customer base defaults to whatever AI surfaces. The independent operator's traditional customer base is aging out. Operators that do not build entity-strength infrastructure now will discover their customer-discovery surface has structurally consolidated around national chains and platform aggregators within a few years.

Is the report free?

Yes. The web version is free to read and the PDF download is ungated. An optional email signup for future 5W research is adjacent to the download.

Can 5W run a Generative Engine Optimization program for my local-services business?

Yes. 5W's Generative Engine Optimization practice is detailed at 5wpr.com/practice/geo-optimization. Local-services-specific GEO services address the entity-strength infrastructure gap directly.

Why now?

Because the citation gap is widening every quarter and the chain-and-aggregator citation moats are hardening. The local operators who invest in entity-strength infrastructure in the next six months will be cited for years. The local operators who wait will discover they have been structurally excluded from the consumer-discovery surface.

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