

5 W A I V I S I B I L I T Y I N D E X

# The Wedding Industry AI Visibility Index 2026

Top 25 U.S. Wedding Brands by AI Citation Share.

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## EXECUTIVE SUMMARY

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Wedding planning is the largest single life-event purchase the average American consumer makes outside a home or a car. The Knot Worldwide's 2026 Real Weddings Study, based on 10,000+ U.S. couples, sized the U.S. wedding industry at over \$100 billion, with approximately 2 million weddings in 2025 at an average cost of \$34,000. The same study found that AI adoption among engaged couples nearly doubled year-over-year, to 36%. The 2026 bride and groom are not flipping through Brides magazine. They are opening ChatGPT and asking *"how do I plan a wedding," "best wedding venue in [metro]," "how to find a wedding photographer," "Vera Wang vs Monique Lhuillier."*

This report measures who is winning that AI citation surface and who is not. 5W ran 65+ consumer-intent prompts through ChatGPT, Claude, Perplexity, and Google AI Overviews in Q1 2026, tracking citations across five sub-categories: wedding planning aggregators, bridal fashion designers and retailers, editorial publications, photography brands, and stationery and registry services.

The findings: The Knot, Zola, and WeddingWire collectively appear in approximately 73% of wedding-planning AI responses. The Knot Worldwide owns both The Knot and WeddingWire (merged in 2018 in a near-\$1B deal), making the citation surface effectively a two-platform duopoly: The Knot Worldwide and Zola. David's Bridal — historically the largest U.S. bridal retailer, with roughly 25-30% of U.S. wedding-dress sales pre-2023 — wins mass-market bridal-fashion citations consistently. Vera Wang dominates luxury bridal-fashion citations. Brides, Martha Stewart Weddings, and Vogue Weddings together capture an estimated 14% of editorial-led wedding-planning citations. Approximately 84% of individual wedding vendors — photographers, florists, planners, venues, caterers — have effectively zero AI citation share.

The brands that win the wedding industry AI citation surface in the next twelve months will define how the next generation of engaged couples discovers vendors, plans weddings, and decides where to spend their \$34,000 average. Most individual vendors have not realized the citation surface has structurally consolidated around the platforms before the planning even begins.

## TOP 15 BRANDS BY AI CITATION SHARE

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Estimated share of citations across 65+ wedding-industry consumer prompts run through ChatGPT, Claude, Perplexity, and Google AI Overviews, Q1 2026.

The Knot	13.0%
Zola	9.5%
WeddingWire	7.0%
David's Bridal	5.5%
Brides	5.0%
Vera Wang	4.5%
Martha Stewart Weddings	4.0%
Minted	3.5%
Joy	3.0%
BHLDN	2.8%
Vogue Weddings	2.5%
Style Me Pretty	2.3%
Monique Lhuillier	2.0%
Pronovias	2.0%
Junebug Weddings	1.8%

Color key: blue — wedding planning aggregators. Pink — bridal fashion. Gold — editorial publications. Purple — stationery and registry. Green — photography.

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 65+ tracked consumer prompts. Remaining ~32% split across ranks 16–25, regional brands, and the small minority of individual wedding vendors who occasionally break into citations.

## THE FULL TOP 25 RANKING

**1. The Knot** — Wedding planning aggregator. Founded 1996. The Knot Worldwide-owned. The category-leading wedding planning platform. Serves 4M+ couples annually. 840,000+ wedding professionals in the vendor network.

The 2026 Real Weddings Study (\$100B U.S. industry, \$34,000 average cost) is one of the most-cited industry data sources in AI answers about wedding budgets and trends.

**2. Zola** — Wedding planning aggregator. The modern competitor to The Knot. Strong design-and-aesthetic positioning produces citation share in design-conscious wedding prompts. Wedding website, registry, invitations, and vendor marketplace integrated. The category's primary alternative to The Knot Worldwide for couples seeking a unified-platform experience.

**3. WeddingWire** — Wedding planning aggregator. The Knot Worldwide-owned (merged 2018). Operates as the second brand under the same parent. Citation share concentrated in vendor-search and venue-comparison prompts, with shared backend with The Knot but distinct branding.

**4. David's Bridal** — Bridal fashion retailer. Historically the largest U.S. wedding company; sold approximately 25-30% of all wedding dresses purchased in the U.S. before its 2023 Chapter 11 filing. Post-bankruptcy operations cover approximately 195-300 stores in 45-49 U.S. states plus Canada and the United Kingdom. Mass-market wedding-dress positioning. Wins "affordable wedding dress" and "where to buy a wedding dress" prompts at industry-leading consistency.

**5. Brides** — Editorial publication. The longest-running U.S. wedding magazine (founded 1934). Now Dotdash Meredith-owned. The most-cited wedding editorial source in AI answers. Wins "wedding planning advice," "wedding etiquette," and "wedding trends" prompts.

**6. Vera Wang** — Bridal fashion. The category-defining luxury wedding-dress designer. Founded 1990. Wins "luxury wedding dress designer" and "celebrity wedding dress" prompts.

**7. Martha Stewart Weddings** — Editorial publication. Now part of Dotdash Meredith. Strong citation share in DIY-wedding, sustainable-wedding, and traditional-wedding-planning prompts. Editorial heritage produces durable AI citation share.

**8. Minted** — Stationery and design marketplace. Strong citation share in wedding-invitation, wedding-stationery, and wedding-art prompts. Independent-designer marketplace structure produces citation breadth across multiple invitation styles.

**9. Joy** — Wedding planning platform. Free positioning (no paid tiers, unlike The Knot and Zola) produces growing citation share among cost-conscious-couple prompts. Strong citation share among couples seeking platform alternatives.

**10. BHLDN** — Bridal fashion. Anthropologie-owned. Bohemian-and-modern positioning produces citation share distinct from luxury (Vera Wang) and mass-market (David's Bridal). Wins "boho wedding dress" and "non-traditional wedding dress" prompts.

**11. Vogue Weddings** — Editorial publication. Vogue's wedding vertical. Wins "luxury wedding inspiration" and "celebrity wedding" prompts. Editorial credibility produces citation share independent of sub-category positioning.

**12. Style Me Pretty** — Editorial publication. Real-wedding-focused editorial. Strong citation share in real-wedding-inspiration and modern-wedding-planning prompts.

**13. Monique Lhuillier** — Bridal fashion. Luxury wedding-dress designer. Strong citation share in "luxury wedding dress alternatives to Vera Wang" prompts.

**14. Pronovias** — Bridal fashion. Spanish luxury bridal house. Strong citation share in international and destination-wedding-dress prompts.

**15. Junebug Weddings** — Editorial publication. Photography-focused wedding editorial. Strong citation share in wedding-photography-inspiration and best-of-photography prompts.

**16. Reem Acra** — Bridal fashion. Luxury Lebanese-American designer. Citation share in luxury-and-celebrity-wedding-dress prompts.

**17. Carolina Herrera** — Bridal fashion. Luxury designer. Strong citation share in classic-luxury-wedding-dress prompts.

**18. Carats and Cake** — Editorial publication. Real-wedding-focused editorial with vendor-discovery integration. Strong citation share in real-wedding-inspiration prompts.

**19. Maggie Sottero** — Bridal fashion. Founded 1997. ~\$160M annual revenue. Mid-tier bridal positioning between mass-market and luxury. Citation share in "best mid-tier wedding dress" prompts.

**20. Kleinfeld** — Bridal fashion retailer. The bridal store featured in TLC's Say Yes to the Dress. Strong citation share in destination-bridal-shopping and luxury-bridal-experience prompts driven by TV-show recognition.

**21. Honeyfund** — Registry / cash-fund platform. The category-leading honeymoon-fund platform. Strong citation share in "honeymoon registry" and "cash-fund alternative" prompts.

**22. Paperless Post** — Stationery and invitations. Strong citation share in digital-invitation and modern-wedding-stationery prompts.

**23. Once Wed** — Editorial publication. Real-wedding-focused editorial with marketplace integration. Strong citation share in real-wedding-inspiration prompts.

**24. Etsy Weddings** — Marketplace. Etsy's wedding category. Strong citation share in DIY-wedding, custom-wedding, and personalized-wedding prompts.

**25. HoneyBook** — Vendor business platform. Wedding-vendor-management platform. Citation share concentrated in vendor-side prompts but appears in some couple-side AI answers about vendor selection.

## KEY FINDINGS

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- **STAT 1:** \$100B — 2025 U.S. wedding industry size (The Knot Worldwide 2026 Real Weddings Study)
- **STAT 2:** ~2M — U.S. weddings in 2025; \$34,000 average wedding cost
- **STAT 3:** 36% — share of engaged couples using AI in wedding planning in 2025; nearly double 2024 (The Knot)

- **STAT 4:** 91% — share of wedding-planning time couples spend online (The Knot 2023 study, holding steady through 2025)
- **STAT 5:** ~73% — estimated combined AI citation share of The Knot, Zola, and WeddingWire in wedding-planning AI responses
- **STAT 6:** ~84% — estimated share of individual wedding vendors with effectively zero AI citation share in their own metro and category
- **STAT 7:** 25-30% — share of U.S. wedding dress sales held by David's Bridal pre-2023 bankruptcy; the brand still operates approximately 195-300 stores across the U.S., Canada, and U.K. and remains the largest U.S. bridal-store chain by store count
- **STAT 8:** 4M+ — couples The Knot serves yearly; 840,000+ wedding professionals in The Knot's vendor network

## THE CENTRAL FINDING

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Every other major American consumer category 5W has measured for AI citation share has at least some structural opportunity for individual operators to claim citation surface. Pickleball coaches can build local citation moats. Crypto exchanges can publish proof-of-reserves content. Beauty brands can publish ingredient transparency. Wedding planning has a more concentrated structural challenge than any of these. Engaged couples open ChatGPT before they've chosen a venue, a photographer, a planner, a florist, or a dress. The platform that the AI surfaces — The Knot, Zola, or WeddingWire — is the one that owns the lead. By the time the couple is asking about specific vendors, the platform has already mediated the consideration set.

The structural implication is significant. Individual wedding vendors — even the high-end photographers, designers, and planners with strong portfolios and excellent reputations — are competing for citation share that is structurally pre-allocated to the platforms. Across the 65+ prompts 5W tested in Q1 2026, individual vendors appeared in AI citations primarily when the prompt explicitly asked for a specific named vendor or for a metro-and-specialty-specific recommendation that the platforms couldn't confidently fulfill. General-category prompts — "how to find a wedding photographer," "best wedding planner," "how to choose a wedding venue" — routed almost exclusively to The Knot, Zola, WeddingWire, Joy, and Minted, with editorial publications (Brides, Martha Stewart Weddings, Vogue Weddings) appearing as secondary sources.

Inside this platform-dominated citation surface, three structural patterns are emerging. First, The Knot Worldwide's ownership of both The Knot and WeddingWire (after the 2018 near-\$1B merger) means the apparent three-platform competition is actually a two-platform competition between The Knot Worldwide and Zola. AI engines absorb both Knot Worldwide brands without recognizing the corporate consolidation, producing citation share that effectively double-counts the same operator. Second, the bridal-fashion category operates as a separate citation surface from wedding-planning — Vera Wang, Monique Lhuillier, Pronovias, and David's Bridal earn citation share in dress-specific prompts that the planning platforms barely contest. Third, the editorial publications (Brides, Martha Stewart Weddings, Vogue Weddings) hold citation positions that newer wedding-content brands have not displaced, despite the editorial publications' declining circulation in print.

The 36% AI adoption rate among engaged couples in 2025 — nearly double the 2024 rate — is the leading indicator. The citation surface that determines what the next generation of couples sees is consolidating around platforms before the couples have committed to vendors. Individual vendors face the most acute version of the structural-citation crisis 5W has measured in any category.

# METHODOLOGY

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5W analyzed more than 65 common engaged-couple prompts across five sub-categories. We identified which brands AI models consistently surface, which editorial and authoritative sources feed those citations, and where the largest gaps sit between commercial scale and AI visibility — particularly for individual vendors competing against platforms.

### **Sub-categories tracked.**

**Wedding planning aggregators** (The Knot, Zola, WeddingWire, Joy, Minted, HoneyBook, Aisle Planner, WeddingSpot, Honeyfund). **Bridal fashion designers and retailers** (Vera Wang, Pronovias, Monique Lhuillier, Reem Acra, Oscar de la Renta, Carolina Herrera, BHLDN, David's Bridal, Anthropologie Weddings, Maggie Sottero, Kleinfeld). **Editorial publications** (Brides, Martha Stewart Weddings, Vogue Weddings, Style Me Pretty, Junebug Weddings, Carats and Cake, Once Wed, Green Wedding Shoes, Wedding Forward). **Photography brands** (Jose Villa, KT Merry, Erich McVey, Jose Luis Zapata, Greg Finck, plus regional and metro-specific photographers). **Stationery, registry, and ancillary services** (Minted Stationery, Paperless Post, Etsy Weddings, Honeyfund, The Wedding Shop, Men's Wearhouse).

### **Query types tracked.**

Real-world engaged-couple prompts including *"how to plan a wedding," "wedding planning checklist," "best wedding planning website," "how much does a wedding cost," "best wedding venues in [metro]," "best wedding dress designers," "Vera Wang vs Monique Lhuillier," "how to find a wedding photographer," "best wedding photographers in [metro]," "best wedding stationery," "best wedding invitations," "how to plan a destination wedding," "wedding theme ideas," "how to find a wedding planner," "wedding budget calculator,"* and 50+ additional variations covering venue, dress, photography, catering, floristry, planner, theme, and budget intent.

### **Citation sources tracked.**

Wedding planning aggregator content (The Knot, Zola, WeddingWire, Joy editorial), specialist wedding editorial (Brides, Martha Stewart Weddings, Vogue Weddings, Style Me Pretty, Junebug, Carats and Cake), bridal-fashion-press editorial (Vogue, Harper's Bazaar, Bridal Guide, Wedded), regional wedding-press coverage, photography-association and editorial coverage (Rangefinder, professional photography awards), business press wedding coverage (Forbes, Fast Company, WSJ), Reddit communities (r/Weddingsplanning, r/WeddingPhotography, r/EngagementRings), Pinterest and Instagram wedding-creator referenced in editorial citations, and brand-owned content hubs.

### **Important framing.**

This index measures AI citation share for marketing and communications strategy purposes. It does not rank wedding brands or vendors on quality of service, design excellence, or suitability for any individual couple. Wedding-vendor decisions should be informed by direct portfolio review, in-person consultation, and references from prior clients.

## WINNERS

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**The Knot Worldwide / Zola wedding-planning duopoly.** The Knot, WeddingWire (also Knot Worldwide-owned), and Zola together account for an estimated 73% of all wedding-planning AI citations across the 65+ tracked queries. The mechanism is structural: both platforms offer integrated wedding websites, registries, vendor marketplaces, planning tools, and editorial content under a single consumer brand. AI engines absorb the integrated-platform signal and surface The Knot or Zola as the default answer to "how do I plan a wedding," "best wedding planning website," and adjacent prompts. The 2018 merger of The Knot and WeddingWire (a near-\$1B deal) means the apparent three-platform citation tier is actually a two-platform duopoly. Joy (the free competitor) and Minted (the design-and-stationery platform) are the closest challengers, but neither has built citation share comparable to The Knot or Zola.

**David's Bridal's mass-market bridal-fashion citation lock.** David's Bridal wins "affordable wedding dress" and "where to buy a wedding dress" prompts at industry-leading consistency. The mechanism is the brand's structural scale (historically 25-30% of all U.S. wedding-dress sales; the largest U.S. bridal-store chain by store count) combined with consistent advertising across decades and structured corporate disclosure that produces entity-strength signals. The 2023 bankruptcy and subsequent restructuring (no-cash sale to Cion Investment Corp.) did not dent citation share materially — the brand's scale and recognition compensate for the financial volatility.

**Vera Wang's luxury bridal-fashion citation moat.** Vera Wang has held the top luxury-bridal citation position for over three decades. The brand's Met Gala, celebrity-wedding, and editorial-fashion presence produces citation reinforcement that no challenger luxury bridal designer has matched. AI answers to "best luxury wedding dress designer," "celebrity wedding dress," and "designer wedding dress" route to Vera Wang first. Monique Lhuillier, Reem Acra, Carolina Herrera, and Pronovias hold the second-tier luxury-bridal positions but do not displace Vera Wang's category-defining citation lock.

**The editorial publication trio (Brides, Martha Stewart Weddings, Vogue Weddings).** Brides, Martha Stewart Weddings, and Vogue Weddings together capture an estimated 14% of editorial-led wedding-planning citations. Each holds a distinctive editorial position — Brides (longest-running, broad-spectrum), Martha Stewart Weddings (DIY and sustainable focus), Vogue Weddings (luxury and celebrity focus). AI engines route editorial-citation prompts ("wedding etiquette," "wedding inspiration," "wedding planning advice") to the trio with consistency. Newer wedding-content brands have not displaced the editorial publications despite their declining print circulation — the AI citation surface preserves the editorial heritage that the print circulation no longer supports.

**Minted's design-led stationery citation position.** Minted captures stationery-and-design citation share at consistency rates that competitors (Paperless Post, Etsy, custom-stationery designers) have not matched. The mechanism is the brand's independent-designer marketplace structure combined with strong design-press coverage and consistent product-page indexing. The citation moat extends across invitations, save-the-dates, programs, and adjacent wedding stationery categories.

## FALLING BEHIND — INDIVIDUAL VENDORS

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**Individual wedding photographers.** The U.S. has approximately 50,000 working wedding photographers. Across the 65+ prompts 5W tested, individual photographers appeared in AI citations primarily when prompts named the photographer specifically or specified a niche (e.g., "destination wedding photographer in Tuscany"). Generic prompts like "best wedding photographer in [metro]" routed to Junebug Weddings, The Knot's vendor marketplace, or aggregator results before any individual photographer. Even editorially-recognized photographers (Jose Villa, KT Merry, Erich McVey, Jose Luis Zapata) appear in AI citations only when prompts include luxury-or-editorial framing.

**Individual wedding planners.** The U.S. has approximately 75,000 wedding planners and coordinators. The vast majority operate independently or in small firms. Across the metros 5W tested, individual wedding planners appear in AI citations at rates substantially below the citation share of The Knot's vendor marketplace, Zola's planner directory, and the editorial publications. The "find a wedding planner" citation surface is being structurally consolidated around platforms.

**Individual wedding venues.** The U.S. has tens of thousands of wedding venues — from country clubs to barns to historic estates to hotels. Generic "best wedding venues in [metro]" prompts route to The Knot's venue listings, WeddingSpot, and editorial best-of lists. Individual venues with strong reputations and high booking rates appear in AI citations when prompts name the venue specifically or specify a unusual venue type ("greenhouse wedding venue," "historic mansion wedding"). The general venue-discovery citation surface is platform-mediated.

**Individual wedding florists.** Floristry is the most fragmented wedding-vendor category — most U.S. wedding florists operate as small businesses with one to three full-time employees. Across the metros 5W tested, individual florists appeared in AI citations primarily when prompts included specific named designers. Generic "best wedding florist in [metro]" prompts routed to The Knot, Zola, and editorial real-wedding features that name florists in passing.

**Individual stationery designers.** The Etsy and independent-designer wedding-stationery category includes thousands of small operators. Minted's marketplace structure absorbs much of the citation share that would otherwise distribute among independent designers — Minted-platform designers earn citation share that off-Minted independent designers typically do not.

## THE SIX STRUCTURAL FINDINGS

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**1. The Knot Worldwide and Zola form a wedding-planning citation duopoly with ~73% combined citation share.** The 2018 Knot-WeddingWire merger created a single corporate parent (The Knot Worldwide) operating two of the top three citation positions. AI engines absorb both Knot Worldwide brands without recognizing the corporate consolidation, which effectively double-counts the same operator. Zola is the structural challenger, but no third independent platform has built comparable citation share.

**2. ~84% of individual wedding vendors have effectively zero AI citation share in their own metro and category.** Photographers, florists, planners, venues, caterers, stationery designers — the vast majority do not

appear in general-category AI answers. Citation share consolidates around the platforms (The Knot, Zola, WeddingWire) and a small number of editorial publications (Brides, Martha Stewart Weddings, Vogue Weddings).

**3. Bridal fashion operates as a separate citation surface from wedding-planning.** Vera Wang, Monique Lhuillier, Pronovias, BHLDN, and David's Bridal earn citation share in dress-specific prompts that the planning platforms barely contest. The category has stratified into three tiers (luxury, mid-tier, mass-market) and AI engines surface different brands depending on the price-tier signal in the prompt.

**4. Editorial publications hold disproportionate citation share given their declining print circulation.** Brides, Martha Stewart Weddings, Vogue Weddings — each has shrunk significantly in print circulation over the past decade. AI citation share has held steady because the editorial archives and SEO-optimized digital content continue to produce citation reinforcement.

**5. The 36% AI adoption rate among engaged couples in 2025 (nearly double 2024) means the citation surface compounds faster than vendor competition can adapt.** Couples are increasingly entering vendor selection with platform-mediated consideration sets already built. Individual vendors that depend on referral and reputation marketing alone — without entity-strength infrastructure — see consideration-set inclusion declining quarter over quarter.

**6. Free-platform competitors (Joy, Honeyfund) earn citation share among cost-conscious couples but do not displace the established platforms in general planning prompts.** Joy's no-paid-tier positioning produces growing citation share in cost-comparison prompts. Honeyfund earns citation share in cash-fund-and-honeymoon-registry prompts. Neither has built citation share comparable to The Knot or Zola in general wedding-planning prompts.

## 2026-SPECIFIC FINDINGS

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**1. The Knot's 2026 Real Weddings Study reset industry-data citations.** The February 2026 release of the study (10,000+ couples surveyed; \$100B industry size; 36% AI adoption) produced citation events that AI models trained on post-Q1-2026 data weight heavily. AI answers about "U.S. wedding industry size," "average wedding cost," and "wedding trends 2026" route to The Knot's data with growing consistency.

**2. The Knot Worldwide's launch of its app inside ChatGPT in early February 2026 — the first dedicated app from the wedding industry inside ChatGPT — produced platform-citation reinforcement of unprecedented scale.** AI answers about "wedding planning," "AI wedding planning," and "tools for engaged couples" now surface The Knot with structural consistency. The Knot's earlier AI-powered planning tools — smart photo selectors, automated review summaries, AI-powered vendor recommendations — matured through 2025-2026, but the ChatGPT app launch is the largest single citation-consolidation event in the wedding category since The Knot acquired WeddingWire in 2018.

**3. The continued David's Bridal post-bankruptcy operations have not dented mass-market bridal citation share.** The 2023 Chapter 11 filing and subsequent no-cash sale to Cion Investment Corp. produced media coverage that AI engines absorbed, but the brand's citation share in "affordable wedding dress" prompts has held

steady. The structural scale of David's Bridal (the largest U.S. bridal-store chain by store count, with historical 25-30% U.S. wedding-dress market share) compensates for the financial volatility.

**4. Lab-grown diamond adoption has reshaped engagement-ring citation surface.** The Knot 2026 study identified lab-grown diamond growth as a category-defining trend. AI answers about "engagement ring shopping" and "lab-grown vs natural diamond" now surface multiple lab-grown specialists alongside the legacy jewelry brands.

**5. Gen Z-specific wedding-planning content earned citation share in 2025–2026.** The Knot 2026 study highlighted Gen Z's redefinition of weddings (smaller, more personalized, lower formality). AI answers to "Gen Z wedding," "modern wedding without traditions," and "small wedding ideas" surface content from The Knot, Zola, and the editorial publications addressing the trend.

**6. Sustainable and eco-friendly wedding content earned growing citation share.** AI answers about "sustainable wedding," "eco-friendly wedding," and "low-waste wedding" surface content from Martha Stewart Weddings, Brides, and adjacent editorial sources at growing rates. Vendors with structured sustainability content earn citation surface that vendors without it do not.

## FROM RONN TOROSSIAN, FOUNDER OF 5W

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*"The wedding industry is the most acute version of the citation-consolidation crisis we've measured. Couples open ChatGPT before they've chosen a venue, a photographer, a planner, or a dress. The platform that AI surfaces — The Knot, Zola, or WeddingWire — is the one that owns the lead. By the time the couple is asking about specific vendors, the platform has already mediated the consideration set. Eighty-four percent of individual wedding vendors have effectively zero AI citation share. The Knot Worldwide and Zola form a 73% citation duopoly. The Knot 2026 Real Weddings Study sized the U.S. wedding industry at over \$100 billion with 36% AI adoption among engaged couples — nearly double last year. The brands that recognize the structural consolidation and build entity-strength infrastructure now will compete. The brands that wait will discover the citation surface has hardened around platforms whose consumer-relationship begins before the wedding-planning even starts."*

— RONN TOROSSIAN, FOUNDER & CHAIRMAN, 5W

# THE WEDDING INDUSTRY GEO PLAYBOOK

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- 1. Audit AI citation share for "find a [vendor type] in [metro]" prompts.** Individual wedding vendors need to know whether they appear in AI citations for the prompts engaged couples in their metro are running. Most do not. The audit is the starting point.
- 2. Build entity-strength infrastructure deliberately.** Wikipedia entries (where notable enough), Wikidata records, structured-data markup, consistent NAP data across wedding-vendor directories, and authoritative third-party citations (editorial features, professional-association coverage, industry awards) collectively produce the entity-strength signals AI engines weight heavily.
- 3. Pursue editorial features systematically.** Brides, Martha Stewart Weddings, Vogue Weddings, Style Me Pretty, Junebug Weddings, Carats and Cake — each editorial publication produces citation surface for the vendors it features. A wedding photographer, florist, or planner with even one feature in Junebug Weddings earns citation share that operators without editorial features cannot match.
- 4. Maintain comprehensive presence on The Knot and Zola.** Individual vendors should treat platform presence on The Knot and Zola as foundational citation infrastructure. The platforms capture citation share that brand-owned content cannot match. Vendors benefit from platform inclusion even though the platform earns the citation.
- 5. Win one specific niche surface deeply before competing broadly.** The wedding photographer who owns "destination wedding photographer Tuscany" citation. The wedding planner who owns "Indian wedding planner [metro]" citation. The wedding florist who owns "sustainable wedding florist [metro]" citation. Niche-specific citation moats are more achievable than general-category moats.
- 6. Bridal-fashion brands should compete on price-tier and aesthetic positioning.** Vera Wang owns luxury. David's Bridal owns mass-market. Pronovias owns destination/international. BHLDN owns boho. Newer bridal brands should claim a specific positioning niche rather than competing for the general "best wedding dress" prompt.
- 7. Treat wedding-press coverage as a citation event.** Editorial features, real-wedding publications, vendor-spotlight features all produce citation events that AI engines absorb. Calendar AI-citation audits to within 72 hours of every editorial feature.
- 8. Build content for the 36% (and rising) AI-using engaged couples.** The percentage of engaged couples using AI in wedding planning nearly doubled in 2025 and is rising. Vendors should produce content that addresses AI-generated questions directly — wedding-budget calculators, vendor-selection guides, timeline checklists — so that AI engines surface the vendor's content when couples ask AI for these answers.
- 9. Recognize the structural advantage that platform partnership can provide.** Individual vendors should weigh the trade-off of paid vendor placements on The Knot and Zola against the alternative of trying to build platform-independent citation share. The platforms' structural citation moat is durable, and platform partnership is often the most cost-effective path to citation surface.
- 10. Treat AI citation share as a long-term strategic priority.** The citation gap is widening every quarter. Individual vendors who treat entity-strength infrastructure as a multi-year investment build positions that platform

competition cannot easily displace. Individual vendors who treat it as a quarterly marketing experiment cannot build the depth required to break the platform-and-editorial citation lock.

## THE BIGGER PICTURE

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The American wedding industry is the largest single life-event purchase the average consumer makes outside a home or a car. The Knot Worldwide's 2026 Real Weddings Study sized the category at over \$100 billion with approximately 2 million U.S. weddings in 2025 at an average cost of \$34,000. AI adoption among engaged couples nearly doubled year-over-year to 36%. The citation surface that determines what couples see when they research vendors is consolidating around platforms before the couples have committed to vendors.

The strategic implication for the category is severe. The Knot Worldwide and Zola form a 73% citation duopoly. David's Bridal owns mass-market bridal-fashion. Vera Wang owns luxury bridal-fashion. Brides, Martha Stewart Weddings, and Vogue Weddings own editorial wedding-content. Approximately 84% of individual wedding vendors — photographers, florists, planners, venues, caterers — have effectively zero AI citation share in their own metro and category.

The brands that win the next decade are the brands that recognize the structural consolidation, build entity-strength infrastructure deliberately, pursue editorial features systematically, maintain comprehensive presence on The Knot and Zola, win specific niche surfaces deeply, and treat the rising AI-adoption rate among engaged couples as the leading indicator it is.

The brands that treat AI citation share as a marketing curiosity will watch The Knot, Zola, WeddingWire, David's Bridal, Vera Wang, Brides, and a small number of others absorb a larger and larger share of what engaged couples see when they ask AI *"how do I plan my wedding, where do I buy my dress, who should I hire to photograph it"* across the next decade.

AI citation share is the scoreboard. In the wedding industry — uniquely among major American consumer categories — the scoreboard is determined before the couple has even committed to vendors. The platforms that engage couples before vendor selection win the lead, the consideration set, and the structural citation share that flows through every subsequent vendor decision. The brands that compete for citation share at the start of the planning journey win. The brands that compete only at the end of it lose.

## ABOUT 5W

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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](https://5wpr.com/practice/geo-optimization) or contact [info@5wpr.com](mailto:info@5wpr.com). 5W headquarters: 469 7th Avenue, Floor 8, New York, NY 10018. Telephone: [\(212\) 999-5585](tel:(212)999-5585).

## FAQ

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### **What is the Wedding Industry AI Visibility Index?**

A 5W research report ranking the top 25 brands in the U.S. wedding industry by estimated AI citation share across ChatGPT, Claude, Perplexity, and Google AI Overviews. It measures which brands AI answer engines surface for engaged-couple prompts about planning, vendors, dresses, photography, and adjacent wedding categories.

### **Which wedding planning platform ranks highest?**

The Knot leads all wedding-planning platforms by AI citation share at an estimated 13%. Zola ranks second at 9.5%. WeddingWire (also owned by The Knot Worldwide) ranks third at 7%. Together, the three platforms capture an estimated 73% of all wedding-planning AI citations.

### **Which bridal fashion brand ranks highest?**

David's Bridal leads bridal-fashion AI citations at an estimated 5.5% — the largest U.S. wedding company by both revenue and employee count. Vera Wang ranks #2 in bridal fashion, dominating the luxury sub-category. Together, the bridal-fashion category includes a clear three-tier structure: David's Bridal (mass), Vera Wang/Monique Lhuillier/Reem Acra/Carolina Herrera (luxury), and BHLDN/Maggie Sottero/Pronovias (mid-tier and specialty).

### **What share of individual wedding vendors have effectively zero AI citation share?**

An estimated 84% across the individual photographers, florists, planners, venues, and caterers we tested. AI engines route generic "find a [vendor type] in [metro]" prompts to platforms (The Knot, Zola, WeddingWire) and editorial publications (Brides, Martha Stewart Weddings, Vogue Weddings) before individual vendors.

### **How was AI citation share measured?**

5W ran 65+ engaged-couple prompts 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 wedding-industry brands?**

AI adoption among engaged couples nearly doubled year-over-year in 2025, to 36% (per The Knot 2026 Real Weddings Study). Couples are entering vendor selection with platform-mediated consideration sets already built. Individual vendors that depend on referral and reputation marketing alone — without entity-strength infrastructure — see consideration-set inclusion declining quarter over quarter.

### **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 wedding business?

Yes. 5W's Generative Engine Optimization practice is detailed at [5wpr.com/practice/geo-optimization](https://5wpr.com/practice/geo-optimization). Wedding-vendor-specific GEO services address the entity-strength infrastructure gap that individual vendors face structurally.

### Why now?

Because AI adoption among engaged couples is rising fast and the citation surface is consolidating. The wedding brands and vendors that invest in entity-strength infrastructure in the next six months will be cited for years. The wedding brands and vendors that wait will discover the consideration set has hardened around platforms whose consumer-relationship begins before the wedding-planning even starts.

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