AI SYNDICATE RESEARCH · NOVEMBER 2026

Do AI assistants favor national chains?

15%

of US local markets: AI's #1 pick is a national chain

ChatGPT · Claude · Gemini · Perplexity · Google AI Overviews · Microsoft Copilot · Grok · Meta AI · DeepSeek · Mistral · Siri · Alexa

4,100	12	50	535
LOCAL MARKETS	AI ASSISTANTS	US STATES	CHAINS IDENTIFIED

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IN ONE PARAGRAPH

In AI Syndicate Research's November 2026 study of 4,100 US local markets and 12 AI assistants, AI's #1 pick was a national chain in 15.2% of markets (95% range 14.2–16.3%), and no chain made the top 10 in 45%. Assistants that answer from memory named a chain first in 36% of answers; assistants that search the web, in 14%. Counting every assistant equally, chains would be #1 in 27.5% of markets.

ABOUT THIS REPORT

When someone asks an AI assistant for a plumber, a mover or a hotel, does it send them to a national brand or to a local business? We classed every business AI ranked in 4,100 US markets as a national chain or a local business, and read which one each of 12 assistants named first.

CITE THIS REPORT

> AI Syndicate Research, "Do AI Assistants Favor National Chains? Chains vs Local Businesses in 4,100 US Markets," November 2026, measured 1–9 November 2026, https://www.aisyndicate.com/research/chains-vs-local-businesses-in-ai-november-2026/

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Executive summary

FIGURE 1 **Chains and local businesses in AI's recommendations, November 2026**

15%
Markets where AI's #1 pick is a national chain
4,100 US markets; 95% range 14–16%

36%
Answers from memory-only assistants that name a chain first
Grok, Meta AI, DeepSeek and Mistral

14%
Answers from live-search assistants that name a chain first
ChatGPT, Claude, Gemini, Perplexity, AI Overviews, Copilot

45%
Markets with no chain anywhere in AI's top 10
4,100 markets

28%
Chain #1s if every assistant counted the same
Against 15% when each counts by its audience

2 of 20
Trades where a chain is #1 in most markets
Water damage restoration and window and door replacement

Source: AI Syndicate Research, Do AI Assistants Favor National Chains?, November 2026 (**aisyndicate.com**)

Key findings

1. **AI's first pick is usually local.** A national chain is AI's #1 in **15.2%** of 4,100 US markets (95% range 14.2–16.3%), and in 45% of markets no chain makes the top 10. Chains hold 14% of all ranked places.

2. **It depends almost entirely on the trade.** A chain is #1 in 60% of water damage restoration markets and 55% of window replacement markets, but in none of the restaurant, cosmetic dentist or criminal defense markets.

3. **Assistants that answer from memory lean on chains.** Grok, Meta AI, DeepSeek and Mistral name a chain first in **36%** of their answers. The six live-search assistants do so in **14%**, and the reconstructed voice answers in 14%. Grok is the extreme, at 58%; ChatGPT is the least, at 9%.

4. **Which assistants you count changes the answer.** If every assistant counted the same, a chain would be #1 in 27.5% of markets. Counting each by how many people use it, it is 15.2%. The assistants with the largest audiences pick local businesses most often.

5. **Local businesses beat chains through the live-search assistants.** In water damage restoration and window and door replacement, where chains usually win, a local #1 was named by ChatGPT in 98% of markets and by Gemini in 92%, but by Grok in 6% and by Mistral in 7%.

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6 **The way you ask does not matter here.** "Best", "recommend" and "affordable" questions all get a chain first in about 20% of answers. When a chain is named, it sits at the same median position (#3) as a local business.

What it means. For most local businesses, the competition in AI answers is other local businesses, not national brands. The exceptions are a handful of trades with strong franchise networks. In those trades, the local businesses that win are the ones the live-search assistants find on the web, because the memory-only assistants mostly name the brands they already know. These are observed patterns, not proof of cause.

Scope. 4,100 markets: 205 metros in all 50 US states, times 20 types of business. 12 assistants, 3 fixed questions each, asked between 1 and 9 November 2026. Rankings are AI Syndicate Local's November 2026 edition, ranked by AI reach. The method, its limits and what we hold back are set out at the end.

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01

How did we tell chains from local businesses?

This paper reads the November 2026 edition of AI Syndicate Local, our public index of which local businesses AI assistants recommend. Each month we ask 12 assistants the same three questions about a type of business in a metro area: the best one, the one to recommend to someone who needs one, and an affordable one nearby. A market is one metro area and one type of business, so 36 answers go into each market.

- **Live web search:** ChatGPT, Claude, Gemini and Perplexity answer with web search on. Google AI Overviews is the overview Google shows for the question. Microsoft Copilot answers come mostly from Microsoft's Bing-grounded AI service, and otherwise are reconstructed from Bing results.
- **Model memory only:** Grok, Meta AI, DeepSeek and Mistral answer from what the model learned.
- **Reconstructed voice answers:** Siri and Alexa cannot be asked programmatically. We reconstruct their answers from the kinds of sources each draws on, in the short style each speaks in.

How #1 is decided. Each market's ranking is ordered by AI reach. Every answer counts by how many people use that assistant and by how high in the answer the business was named, so being named first by ChatGPT counts for more than being named fifth by a smaller assistant. No assistant counts for more than 30% of a market. The weights and their sources are on the **methodology page**. Until November the index ranked by how many answers named a business, with every assistant equal; we compare the two below.

What counts as a chain. We classed every ranked business as a national chain or a local business. A business is a chain when it operates in at least five of our 205 metros across at least three states, which we detect three ways: the same website (427 of the chain #1s, such as servpro.com or hilton.com), a franchise name of the form "Window World of Mobile" (185), or the same name in eight or more metros (13). That finds 535 chains. We checked every chain that reaches a top three in three or more markets by hand and removed common names shared by unrelated local firms, such as "Glow Med Spa". Hotels that belong to a group, such as a Hilton or Marriott property, count as chains.

Who is named first. For each assistant and question, we also record which ranked business the answer named first. This shows which way each assistant leans, independent of how the ranking adds them up.

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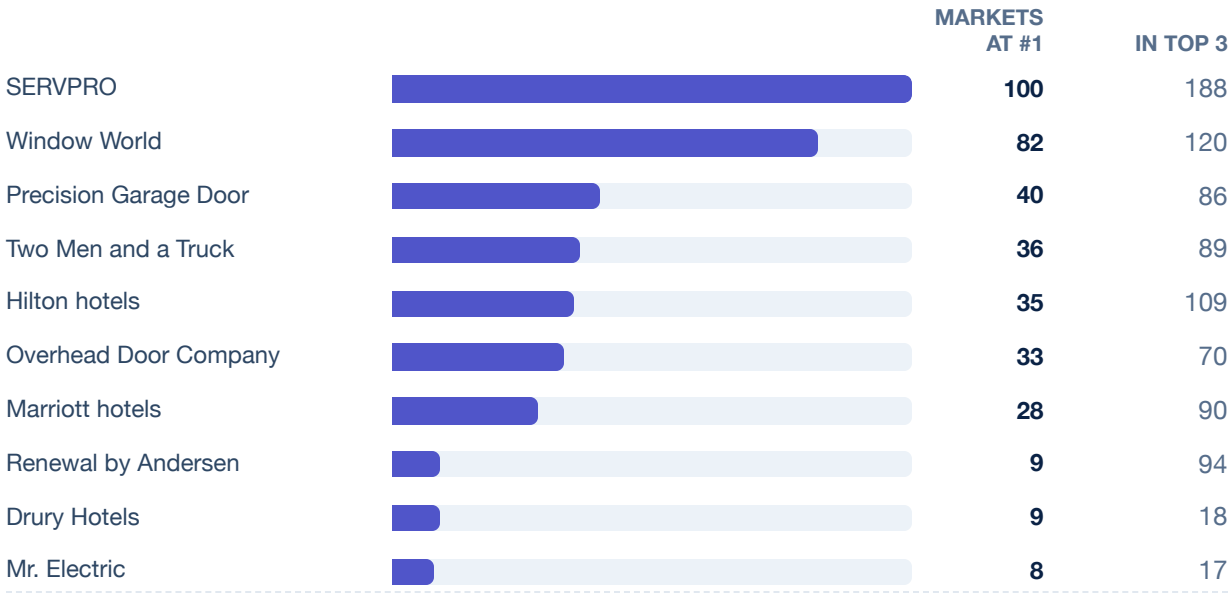
02

How often is AI's #1 local pick a national chain?

Not often. In 625 of 4,100 markets (**15.2%**), AI's #1 pick is a national chain. In the other 85% it is a local business. Chains are no more common further down the list: they hold 14% of top-three places, 14% of top-ten places and 14% of all ranked places. In 45% of markets there is no chain anywhere in the top 10.

FIGURE 2 **The national chains that are AI's #1 in the most markets**

4,100 markets, November 2026. Markets where the chain is #1; second column, markets where it is in the top three.



Source: AI Syndicate Research, Do AI Assistants Favor National Chains?, November 2026 (**aisyndicate.com**)

A few franchise networks account for most chain #1s. SERVPRO is #1 for water damage restoration in 100 of 205 metros, and Window World for window replacement in 82. In all, 121 chains hold a #1 somewhere.

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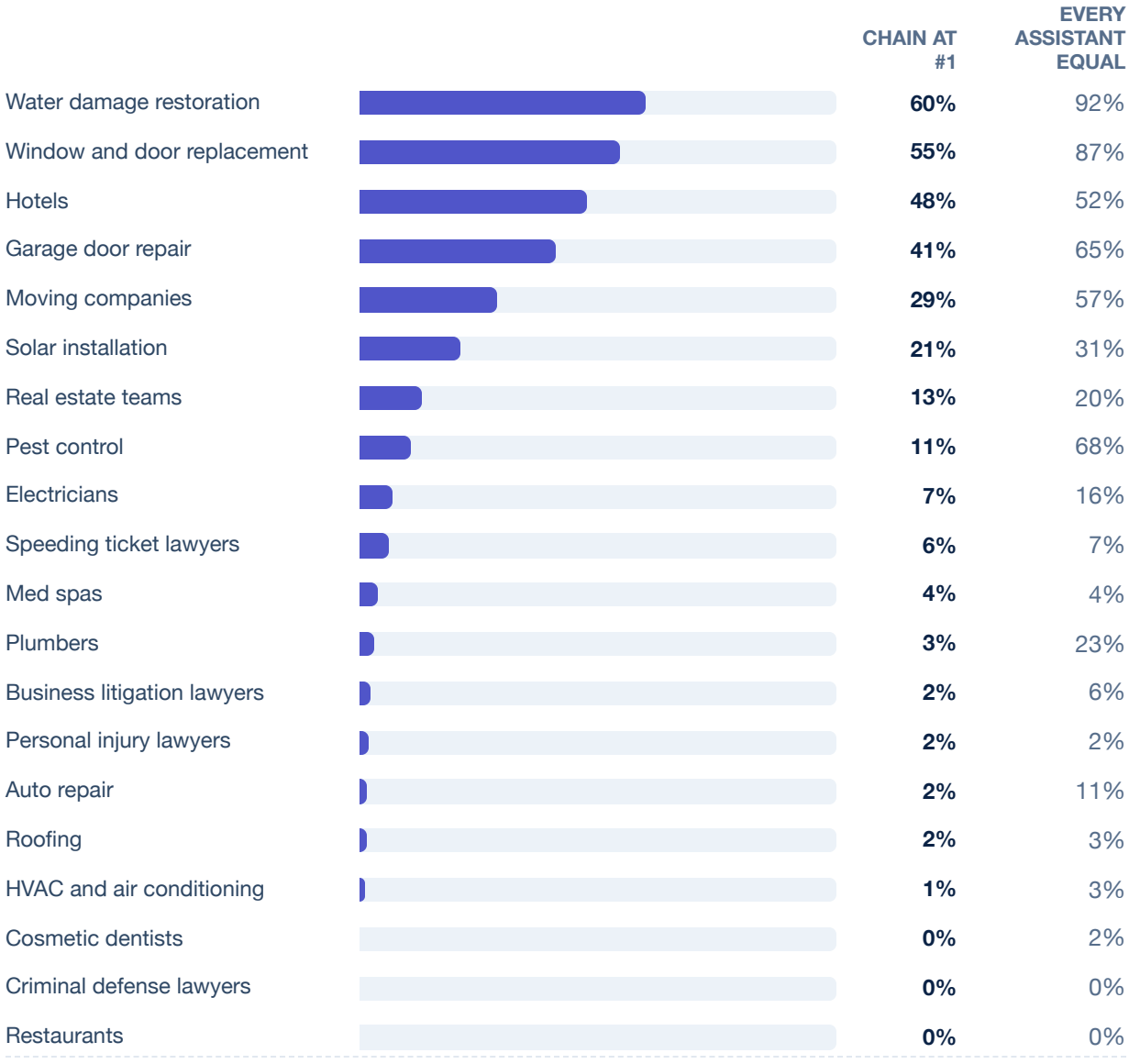
03

In which trades does AI recommend chains?

Almost entirely on the trade. The chart shows, for each type of business, the share of its 205 markets where AI's #1 is a national chain. The second column shows the same share if every assistant counted the same.

FIGURE 3 **Share of markets where AI's #1 is a national chain, by type of business**

205 markets per type, November 2026. Second column: the same share with every assistant counted equally.



	CHAIN AT #1	EVERY ASSISTANT EQUAL
Water damage restoration	**60%**	92%
Window and door replacement	**55%**	87%
Hotels	**48%**	52%
Garage door repair	**41%**	65%
Moving companies	**29%**	57%
Solar installation	**21%**	31%
Real estate teams	**13%**	20%
Pest control	**11%**	68%
Electricians	**7%**	16%
Speeding ticket lawyers	**6%**	7%
Med spas	**4%**	4%
Plumbers	**3%**	23%
Business litigation lawyers	**2%**	6%
Personal injury lawyers	**2%**	2%
Auto repair	**2%**	11%
Roofing	**2%**	3%
HVAC and air conditioning	**1%**	3%
Cosmetic dentists	**0%**	2%
Criminal defense lawyers	**0%**	0%
Restaurants	**0%**	0%

Source: AI Syndicate Research, Do AI Assistants Favor National Chains?, November 2026 (**aisyndicate.com**)

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Chains lead where franchise networks are dense and the service is the same everywhere: water damage restoration, window replacement, hotels and garage door repair. They are rare where the work is personal or local by nature. No restaurant, cosmetic dentist or criminal defense market has a chain at #1, and fewer than 3% of plumber, HVAC, roofing, auto repair, personal injury or business litigation markets do.

Pest control shows how much the counting matters. Orkin and Terminix are on the rankings in nearly every metro, and with every assistant counted equally a chain would be #1 in 68% of pest control markets. Counted by audience, it is 11%, because the assistants that put the big brands first are mostly the ones fewer people use.

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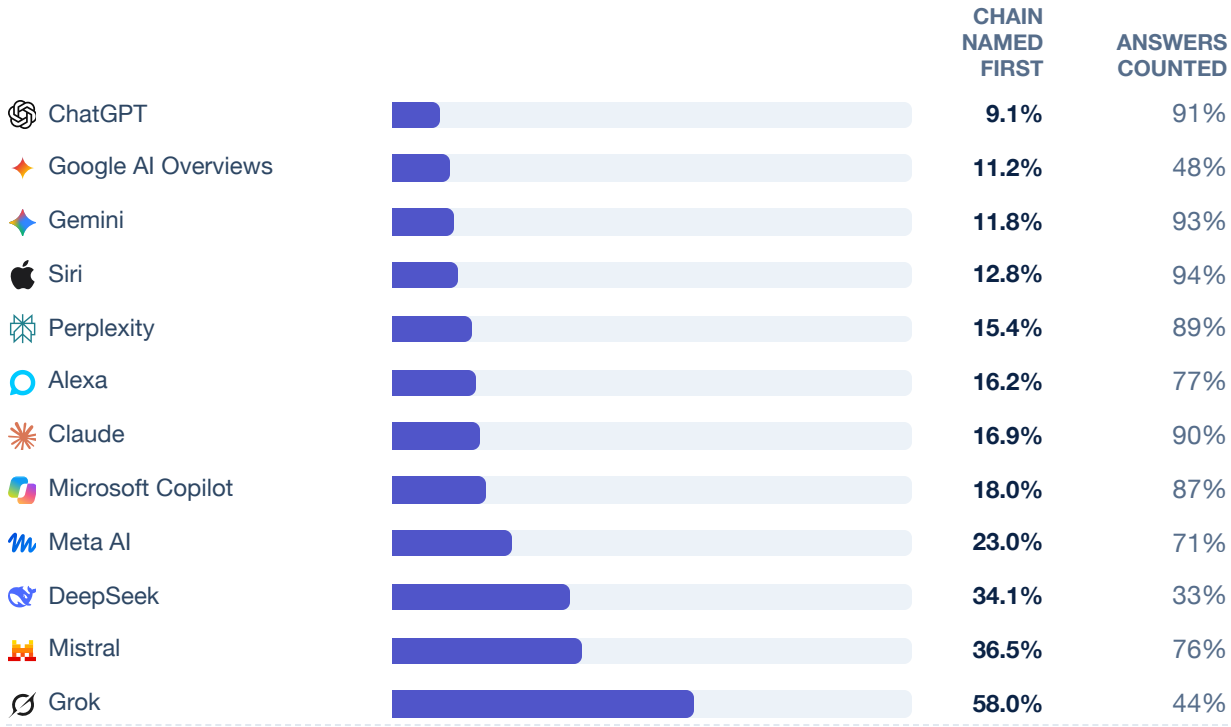
04

Do ChatGPT, Gemini, Grok and the other assistants favor chains equally?

No, and the difference follows how each assistant gets its information. For every answer, we looked at the ranked business it named first and asked whether it is a chain.

FIGURE 4 **Share of answers that name a national chain first, by assistant**

4,100 markets, November 2026. Answers whose first-named business made the market's ranking. Second column: the share of the assistant's answers where that is so.



Source: AI Syndicate Research, Do AI Assistants Favor National Chains?, November 2026 (**aisyndicate.com**)

The four assistants that answer from memory name a chain first in **36%** of answers (95% range 34.7–37.3%). The six that search the web do so in **14%** (13.2–14.5%), and the reconstructed Siri and Alexa answers in 14%. The likeliest reason: a model answering from memory knows the brands that appear across the whole web, and a national brand is a safe name to give for a city it knows little about, while an assistant that searches finds the businesses that local review sites, directories and news name for that city.

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Grok is the extreme: when its first pick made the ranking, it was a chain 58% of the time. ChatGPT, the most-used assistant, was the least likely to lead with a chain, at 9%. Weighting every assistant by its audience, **14%** of first picks are chains; counting them equally, 22%.

The pattern holds within trades. The table shows the share of answers that name a chain first, by type of assistant, in the trades where chains matter most.

Type of business	Live search	Memory only	Voice (reconstructed)
Water damage restoration	43%	84%	42%
Window and door replacement	44%	80%	53%
Hotels	44%	42%	43%
Garage door repair	26%	66%	30%
Moving companies	22%	76%	23%
Pest control	17%	69%	15%
Plumbers	4%	26%	5%
Roofing	1%	6%	1%

A caution on the memory-only assistants: their first pick often did not make the market's ranking at all (DeepSeek's in 67% of answers, Grok's in 56%), because they name businesses no other assistant confirms. If every one of those unranked first picks were local, Grok would still name a chain first in at least 25% of all its answers, against 8% for ChatGPT.

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05

Why does the way you count the assistants matter?

Because the assistants disagree, the way a ranking adds them up decides how often chains come out on top. Ranked the way AI Syndicate Local ranked until November, by how many answers named each business with every assistant equal, a chain would be #1 in **27.5%** of markets. Ranked by AI reach, where each assistant counts by how many people use it and a first mention counts for more than a fifth, it is **15.2%**.

FIGURE 5 **Share of markets where AI's #1 is a national chain, two ways of counting**

4,100 markets, November 2026, the same answers counted two ways.



Source: AI Syndicate Research, Do AI Assistants Favor National Chains?, November 2026 (**aisyndicate.com**)

The answers are the same in both. What changes is whose answers carry weight. Grok, DeepSeek and Mistral, which lean hardest on chains, have small audiences, while ChatGPT, Google AI Overviews and Gemini, which lean local, have the largest. Neither count is the true one, but a business owner should know which assistants their customers use. The November AI Local Report, written before the rankings were re-scored, used the earlier count.

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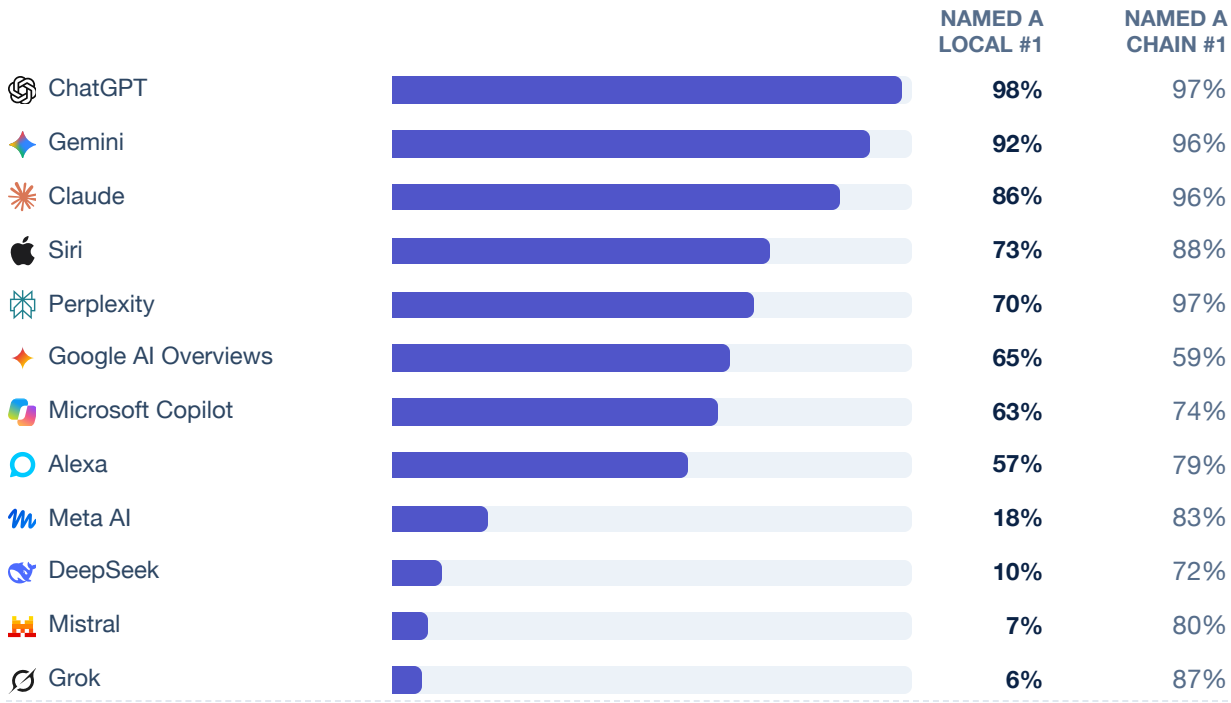
06

How do local businesses beat chains in AI recommendations?

In water damage restoration and window and door replacement, a chain is #1 in more than half of markets. We compared the 175 markets where a local business still took #1 with the 235 where a chain did.

FIGURE 6 **Which assistants named the #1, local vs chain**

Water damage restoration and window and door replacement, November 2026. Share of markets where each assistant named the #1. Local #1s: 175 markets; chain #1s: 235.



Source: AI Syndicate Research, Do AI Assistants Favor National Chains?, November 2026 (**aisyndicate.com**)

The local winners are carried by the live-search assistants. ChatGPT named 98% of them and Gemini 92%, about as often as they named chain #1s. The memory-only assistants almost never did: Grok named 6% of local #1s against 87% of chain #1s, and Mistral 7% against 80%. A typical local #1 was named by 6 of 12 assistants; a typical chain #1, by 11.

So a local business can win a chain-heavy trade without the memory-only assistants, as long as the search assistants put it first. The local #1s had their own website cited by the assistants about as often as the chain #1s (79% against 82%), so having a website is not what separates them. Their leads were narrower, though: a median 7.2 reach points over #2, against 12.4 for a chain.

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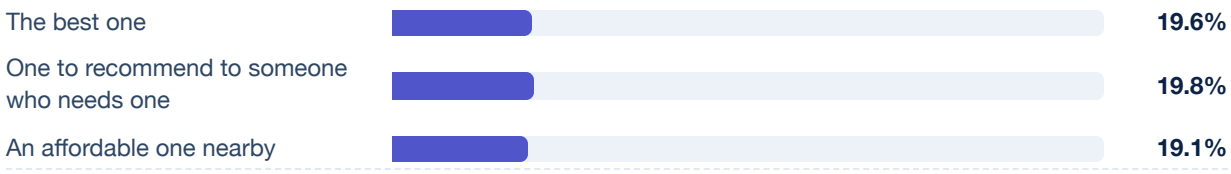
07

Does asking for something affordable, or the order of names, favor chains?

Neither changes much. A natural guess is that "affordable" questions push AI toward chains. They do not: the share of answers naming a chain first is 20% for "best", 20% for "recommend" and 19% for "affordable", differences within the margin of error.

FIGURE 7 **Share of answers that name a chain first, by the way the question is asked**

4,100 markets, November 2026, all 12 assistants.



Source: AI Syndicate Research, Do AI Assistants Favor National Chains?, November 2026 (**aisyndicate.com**)

Nor are chains placed higher when they are named. A chain's median position in an answer is #3, the same as a local business's, and each is named first in about 23% of the answers that name it (22.9% for chains, 23.6% for local businesses).

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08

Do some states see more chains in AI answers?

Somewhat. Every state has the same 20 trades, so the trade mix does not explain it. The share of markets with a chain at #1 runs from 2% in North Dakota to 35% in Alabama.

Lowest share of chain #1s	Share	Markets	Highest share of chain #1s	Share	Markets
North Dakota	2.5%	40	Alabama	35.0%	80
Wisconsin	3.8%	80	Mississippi	28.3%	60
Alaska	5.0%	40	Louisiana	27.5%	80
Arizona	6.0%	100	Ohio	23.3%	120
Utah	6.2%	80	Delaware	23.3%	60

Alabama, Mississippi and Louisiana have the highest shares. Each state has 40 to 120 markets, so treat the order within each list as rough, and the reasons for the differences are not something this data can show.

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09

What should a local business or franchise do with this?

- **Know whether you compete with chains at all.** In most trades you do not: no chain is in the top 10 in 45% of markets. In water damage restoration, window replacement, hotels and garage door repair, you probably do.
- **Win the live-search assistants first.** ChatGPT, Gemini, Google AI Overviews and Perplexity carry most of the audience and lean local. They name the businesses that review sites, directories and local news name, so that is where to be present and accurate.
- **Do not expect the memory-only assistants to find you soon.** Grok, DeepSeek and Mistral mostly name brands they learned in training. Being named by them takes years of broad coverage, not a better website.
- **Ask which assistants your customers use.** The same answers put a chain at #1 in more than a quarter of markets or in about one in seven, depending on whose answers count. Your position depends on the same question.
- **If you are a franchise, your local office is what AI names.** Window World, Overhead Door and Precision Garage Door win as "<brand> of <city>". The local listing, not only the national site, is what assistants pick up.

These are patterns in what the assistants said, not guarantees.

How this data is used. This research feeds the AI Syndicate platform, so our clients have the leading edge. Clients see where they stand in their market's AI Local ranking, which assistants name them and which name their competitors, inside their dashboard. What we learn across the whole index, such as which assistants lean on national brands, is built into the twelve-assistant measurement the platform runs for each client's own business.

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10

How was this measured, and what can it not tell you?

Data. AI Syndicate Local, November 2026 edition: 4,100 markets (205 metros in 50 states, 20 types of business), 12 assistants, 3 fixed questions each, asked between 1 and 9 November 2026 with the city named in the question and no user location or account history. A model extracts the business names from each answer in order, and spellings of the same business are merged. A business is ranked when at least two independent answers name it, and each market's published ranking lists up to 25. The edition also has early markets from Canada, the United Kingdom and six new trades; they are left out here.

Ranking. Markets are ranked by AI reach (see the **methodology page**). The "every assistant equal" comparison re-orders the same ranked businesses by how many answers named them, then by how many assistants did, as the index ranked until November.

Chains. A ranked business is a national chain if it operates in at least five metros in at least three states, detected by shared website, "<brand> of <place>" franchise name, or the same full name in eight or more metros (with a website, if any, that spells the name). Name matches whose businesses use two different website domains are treated as different firms. We removed by hand common names shared by unrelated local firms. Counting only chains that share one website, a chain is #1 in 10.4% of markets.

Who is named first. For each assistant and question in a market, the first-named business is the ranked business recorded at position 1 in that answer. Answers whose first name did not make the ranking are left out of the share; the chart shows how many answers each assistant has counted.

What this cannot tell you.

- The chain rule errs toward "local". A franchise that uses a different name and website in every city is counted as local, so the true share of chains is somewhat higher.
- It measures what assistants say, not what customers do.
- It is one month. Chain share may change as the assistants and their sources change.
- The memory-only assistants often name businesses that no other assistant confirms. Their chain shares count only first picks that made the ranking.
- Siri and Alexa answers are reconstructions, read as close approximations, not recordings.
- Associations between how a business is named and whether it is #1 do not show cause.

What stays private. The public index publishes each market's rankings and sources. Per-assistant answer sets and per-business movement are not published.

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Statistical notes

- **Unit of measurement.** Shares of markets count each market once. Shares of answers count each answered (assistant, question) pair once.
- **Ranges.** 95% ranges come from resampling markets 1,000 times. They describe uncertainty across markets.
- **Audience weighting.** The audience-weighted share of first picks uses the same capped audience shares as the AI reach ranking.
- **Small groups.** State figures rest on 40 to 120 markets each and are directional.

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Key figures

Every key figure in this report, in one table. The same figures are in **findings.json** and **findings.csv**, free to quote with credit. Ranges are 95% intervals from resampling markets.

Finding	Value	95% range	Sample
Share of US local markets where AI assistants' #1 pick is a national chain	**15.2%**	14.2–16.3%	4,100 markets
Share of US local markets with no national chain in AI's top 10	**45.4%**		4,100 markets
Share of all ranked places held by national chains	**14.1%**	13.7–14.6%	4,100 markets
Share of water damage restoration markets where AI's #1 is a national chain	**60%**		205 markets
Share of answers from memory-only assistants that name a national chain first	**36%**	34.7–37.3%	Grok, Meta AI, DeepSeek, Mistral
Share of answers from live-search assistants that name a national chain first	**13.9%**	13.2–14.5%	ChatGPT, Claude, Gemini, Perplexity, AI Overviews, Copilot
Share of Grok's answers that name a national chain first	**58%**		5,339 answers
Share of ChatGPT's answers that name a national chain first	**9.1%**		11,243 answers
Share of markets where AI's #1 would be a national chain with every assistant counted equally	**27.5%**	26.2–28.9%	4,100 markets
Share of local #1s in chain-heavy trades named by ChatGPT	**98.3%**		175 markets
Share of local #1s in chain-heavy trades named by Grok	**5.7%**		175 markets
Share of answers to an 'affordable' question that name a national chain first	**19.1%**	18.3–20%	4,100 markets

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THE DATA

Every market's rankings are published at aisyndicate.com/ai-local, with the full methodology.

SOURCES

1. AI Syndicate Local: the November 2026 edition — AI Syndicate. Read Nov 12, 2026.
2. AI Syndicate Local methodology: how the index is measured and how much each assistant counts — AI Syndicate. Read Nov 12, 2026.

See whether a chain is AI's pick in your market.

aisyndicate.com/ai-local