HERM.IO RESEARCH · TURKEY EVENING & OCCASION WEAR

AI Visibility Report

The first AI-visibility snapshot of Turkey's evening and occasion wear (abiye / davet) market: how do large language models see and rank brands?

997	40	191	33
Total Responses	Questions Analyzed	Brands Tracked	Qualified Brands

Author: Mert Can Elkaya · 20 July 2026 · Herm.io AI Visibility Database

KEY FINDINGS

At a glance

This report reproduces the real Turkish-language questions consumers ask AI assistants about evening dresses, abiye and occasion wear, and measures how often, in what order, and across how many models five large language models name each brand.

1. **Trendyol** leads the main leaderboard with a 91.9 score, appearing in 47.7% of all responses across all five models; **Carmen** (73.4) is the highest-scoring standalone brand, an 18.5-point gap behind.
2. Of 191 tracked brands, **33** cleared the 5% mention threshold in the main market — 31 Turkish and only 2 foreign (Pronovias #14, Zara #28); with the five marketplaces/retailers removed, Carmen, adL and AlfaBeta lead the brand-only view.
3. This is the **most Turkish-dominated market in the series so far**: in the origin-neutral open cut, mentions split 82.4% Turkish / 17.6% foreign, and foreign names are confined to premium bridal/couture (Pronovias, Chanel, Elie Saab, Valentino) plus Zara and Forever New.
4. **Grok** has by far the widest repertoire (9.9 brands/answer); GPT-4o-mini (3.7) and Claude Haiku (4.1) the narrowest. Search was near-universal — 97.7% of all answers were web-grounded.
5. AI's picture of this market is built mostly on brands' own websites — **65.5%** of cited sources — led by trendyol.com, cited by 58.5% of responses.

SCOPE & METHOD

Vertical: Evening & occasion wear (abiye / davet giyim) — Turkey. Method: a single point-in-time study of 997 responses; five large language models (GPT-4o-mini, Gemini, Claude, Perplexity, Grok), each asked 40 Turkish-language questions five times. Collection date: 4 July 2026.

HOW TO READ THIS REPORT — VISIBILITY IS NOT QUALITY

This report measures one thing: how often, how prominently, and across how many AI assistants a brand is named when people ask about evening and occasion wear in Turkey. A high score means these systems currently have a lot of information available about a brand and surface it readily — not that the brand is better, more elegant, cheaper or higher quality. AI visibility reflects information availability and discovery, not product quality, fit, price or trustworthiness.

Key terms: AI visibility, AI Visibility Score, evening wear brands, occasion wear brands, abiye / davet elbisesi, Turkish (yerli) evening-wear brands, LLM brand recommendations, ChatGPT/Gemini/Claude/Perplexity/Grok brand recommendation, Generative Engine Optimization (GEO).

CONTENTS

Report contents

01

SECTION 01

Executive Summary

AI visibility in Turkey's evening and occasion wear market is led by marketplaces — Trendyol first — with Carmen the most visible standalone brand, on a shelf that is overwhelmingly Turkish and where foreign names appear only in a thin premium niche.

EXECUTIVE SUMMARY

A marketplace-led shelf, overwhelmingly Turkish

ONE-SENTENCE TAKEAWAY

AI visibility in Turkey's evening and occasion wear market is led by marketplaces — Trendyol first, Sefamerve close behind — with Carmen the most visible standalone brand, on a shelf that is overwhelmingly Turkish and where foreign names appear only in a thin premium niche.

1. **Trendyol leads; Carmen is the top brand.** Trendyol tops the main leaderboard at 91.9, appearing in 47.7% of all responses across all five models. Carmen (73.4) is second and the highest-scoring standalone brand — an 18.5-point gap. Sefamerve (64.3), adL (63.9) and AlfaBeta (62.5) complete the top five.
2. **33 brands qualified for the main ranking.** Of 191 tracked brands, 33 cleared the 5% mention threshold across all 40 questions — 31 Turkish and just 2 foreign (Pronovias at #14 and Zara at #28). The average score of the 33 qualified brands is 52.5.
3. **The headline shelf is aggregator-led.** Five of the 33 qualified entities are marketplaces or retailers — Trendyol, Sefamerve, Modanisa, Hepsiburada and Boyner. Remove them and the brand-only top three is Carmen, adL and AlfaBeta; the assistants reach for the big marketplaces first, then a cluster of Turkish occasion-wear specialists.
4. **This is the most Turkish-dominated market in the series.** On the 20 origin-neutral (open) questions, mentions split 82.4% Turkish / 17.6% foreign — the least contested origin balance Herm.io has recorded. Only 6 foreign brands qualify in the open cut, clustered in premium bridal/couture (Pronovias, Chanel, Elie Saab, Valentino) plus two fast-fashion names (Zara, Forever New).
5. **The local shelf is entirely Turkish.** When questions explicitly ask for Turkish/yerli brands (the 20 local questions), all 33 qualified brands are Turkish — not a single foreign name survives the filter.
6. **The models see the same market at very different breadths.** Grok lists ~9.9 distinct brands per answer and Perplexity reaches the widest vocabulary (154 distinct brands); GPT-4o-mini (3.7) and Claude Haiku (4.1) are the most selective. Yet Trendyol tops all five models.
7. **Search was near-universal.** 97.7% of all answers were web-grounded; four of five models searched on ~100% of answers and only Gemini fell below (88.8%). With almost no "memory-only" answers, this edition does not include a web-search-vs-memory comparison (see Chapter 5).
8. **Sources are brand-owned first.** 65.5% of cited sources are brands' own websites; the single most-cited domain is the marketplace trendyol.com (58.5% of responses), followed by a wall of brand sites (carmen.com.tr, alfa-beta.com.tr, adl.com.tr).

Why it matters

Shoppers are shifting discovery from search engines and marketplaces to AI assistants. Whether an evening- or occasion-wear brand appears in those assistants' answers is becoming a discovery channel in its own right. This report captures the first snapshot (baseline) of this new "visibility shelf" for Turkey's evening and occasion wear sector. A reminder: the numbers describe visibility and information availability — not which brands are best.

02

SECTION 02

Methodology

Five large language models were asked 40 Turkish questions five times each — with no system prompt — producing 997 usable responses; brands were ranked with a three-component (45/30/25) score, computed separately for the main, local and open cuts.

METHODOLOGY

How the study was run

ONE-SENTENCE TAKEAWAY

Five large language models were asked 40 Turkish questions five times each — with no system prompt — to produce 997 usable responses; brands were identified by automated extraction plus human validation and ranked with a three-component (45/30/25) score, computed separately for the main, local and open cuts.

2.1 SCOPE AND MODELS

The study queried five large language models directly via API with identical questions. All models received only the user question — no system prompt was used, temperature was not set manually (provider default), and no region/locale parameter was defined. Because the questions are in Turkish, models infer the Turkish market from language alone.

Model	Version	Web search	Rate
GPT-4o-mini	`openai/gpt-4o-mini`	Enabled — web search tool	100.0%
Gemini 2.5 Flash-Lite	`gemini-2.5-flash-lite`	Enabled — Google Search grounding	88.8%
Claude Haiku 4.5	`anthropic/claude-haiku-4.5`	Enabled — web search tool	100.0%
Perplexity Sonar	`perplexity/sonar`	Always search-grounded	100.0%
Grok 4.3	`x-ai/grok-4.3`	Enabled — web search tool	99.5%

Scale: 40 questions × 5 repeats × 5 models = 1,000 responses; 3 were excluded (empty Gemini generations), leaving 997 usable. Single run, 4 July 2026. The 40 questions carry no topical sub-categories, so the category breakdown uses three behavioural types — discovery, attribute and use_case (14 / 13 / 13). Final brand dictionary: 191 entities (158 Turkish, 33 foreign).

2.2 THE THREE MARKET CUTS

Rather than two side-by-side markets, this vertical is read in three cuts of the same questions.

Cut	Questions	Resp.	Qual.	What it answers
Main	40 (all)	997	33	Overall visibility across every question
Local	20 TR-only	497	33	Who is named when the question asks for yerli brands
Open	20 neutral	500	32	Fair Turkish-vs-foreign comparison (no origin restriction)

NOTE

Local + open = the full 40-question set; the main cut spans both.

2.3 WEB-SEARCH CONFIGURATION

Web search was offered as an enabled tool to all five models; each decided for itself whether to use it (Perplexity's Sonar is search-grounded by design). Whether a response drew on web search or the model's own knowledge was inferred from whether the provider returned any citation/source: a citation means "web-search," none means "own knowledge." This is a reasonable proxy, not direct proof of the model's internal process. In this run 97.7% of answers were grounded (see Chapter 5).

2.4 QUESTIONS

The 40 questions reproduce the real Turkish-language queries people bring to an assistant about evening dresses, abiye and occasion wear — general discovery ("abiye elbise önerisi"), specific attributes (fabric, fit, plus-size, non-creasing), and use cases (weddings, henna nights, graduations, engagements). They are balanced across the three behavioural types and split evenly by origin scope. Of the 40, 20 are local (they explicitly ask for Turkish/yerli brands) and 20 are open (no origin restriction). The Turkish-vs-foreign comparison in Chapter 7 rests solely on the 20 open questions.

2.5 BRAND EXTRACTION AND VALIDATION

Brands were extracted in two stages: automated extraction (emphasised brand names and citation domains, variants merged into a canonical name) and human validation (real brands confirmed, non-brands filtered, aliases merged, each brand labelled Turkish/foreign). Final dictionary: 191 entities. Per study scope, marketplaces and retailers (Trendyol, Hepsiburada, Modanisa, Sefamerve, Boyner) are kept as entities so the shelf is described as shoppers meet it; a brand-only view is given in §3.2. Fast-fashion names with their own labels and stores — Koton, LCW, Roman — are treated as brands.

> **ORIGIN RULE**
>
> A brand is Turkish if founded and headquartered in Turkey; foreign otherwise, even when widely sold in Turkey (e.g. Zara, Mango, Pronovias, Elie Saab). A mention is counted once per response (presence, not frequency); position is the mean reciprocal rank of first appearance; breadth is the number of the five models that name the brand.

2.6 AI VISIBILITY SCORE (0–100)

$$\text{Score} = 0.45 \times \text{Mention} + 0.30 \times \text{Position} + 0.25 \times \text{Breadth}$$

Component	Weight	Basis
Mention	45%	mention rate within the cut
Position	30%	MRR (how early the brand is named)
Breadth	25%	number of models covering it (0–5)

Each component is scaled so the leading qualified brand in each cut = 100, then combined with the weights. Qualification (≥5% rule): only brands mentioned in at least 5% of that cut's responses are ranked (33 main, 33 local, 32 open). Unfiltered metrics for all 191 brands appear in Chapter 11.

2.7 NEUTRALITY AND SELF-EXCLUSION

This is a market-wide, neutral study with no focus brand. To prevent any conflict of interest, all citations to Herm.io's own domains were excluded from the source data before analysis, so the company's own content neither appears among the most-cited domains nor influences any figure.

03

SECTION 03

Overall Visibility Leaderboards

Marketplaces lead every cut; the difference between cuts is what happens behind them — the local shelf is entirely Turkish, and even the open shelf is only lightly contested by foreign brands.

OVERALL VISIBILITY LEADERBOARDS

Marketplaces lead, Carmen leads the brands

ONE-SENTENCE TAKEAWAY

Marketplaces lead every cut; the difference between cuts is what happens behind them — the local shelf is entirely Turkish, and even the open shelf is only lightly contested by foreign brands. As a reminder, these rank visibility, not product quality, fit, price or reliability.

3.1 Main leaderboard — 33 qualified brands

TABLE 1 — AI VISIBILITY SCORE (MAIN) 40 questions · 997 responses

#	Brand	Origin	AI Score
1	**Trendyol**	TR	91.9
2	Carmen	TR	73.4
3	Sefamerve	TR	64.3
4	adL	TR	63.9
5	AlfaBeta	TR	62.5
6	VznModa	TR	61.7
7	Modanisa	TR	59.2
8	Koton	TR	56.6
9	Abiyefon	TR	56.0
10	Hepsiburada	TR	53.8
11	Iconas Line	TR	53.4
12	Eser Giyim	TR	53.1
13	ModaSelvim	TR	53.1
14	Pronovias	Foreign	52.9
15	Roman	TR	52.6
16	Kenzel	TR	52.4
17	Lafaba	TR	52.3
18	The ZKS	TR	52.2
19	GIZIA	TR	51.8
20	Tarık Ediz	TR	50.2
21	Rengin	TR	50.2
22	Cengiz Aktürk	TR	48.0
23	Lacrima	TR	46.0
24	Setre	TR	45.8

(cont.)

#	Brand	Origin	AI Score
25	EKOL	TR	45.6
26	LCW	TR	43.4
27	Trendyolmilla	TR	43.3
28	Zara	Foreign	43.0
29	Boyner	TR	42.9
30	Setrms	TR	42.4
31	Eyyo	TR	40.9
32	Ömür Inn	TR	40.2
33	Hülya Keser	TR	32.0

AVERAGE

Average score of the 33 qualified brands: 52.5. 31 of the 33 are seen by all five models; only two foreign names appear in the whole table — Pronovias (#14) and Zara (#28).

Reading. Trendyol maxes out the mention and breadth components and tops the table at 91.9, appearing in 47.7% of answers. Carmen (73.4) is second — the most visible standalone brand — on strong, broad mentions (33.0%). Then come two entities that rank on position rather than volume: Sefamerve (#3) is named in only 13.0% of answers but very early when named (MRR 0.61), and VznModa (#6) clears the bar on just 7.1% mentions with the single highest position component in the cut (MRR 0.67) — read that rank cautiously (see Chapter 10).

3.2 Brand-only view (marketplaces removed)

Five entities above are marketplaces or retailers rather than brands — Trendyol, Sefamerve, Modanisa, Hepsiburada and Boyner. They are kept in the headline ranking because that is how shoppers meet the shelf, but removing them gives a pure brand-versus-brand picture. (Koton, LCW and Roman are treated as brands, not marketplaces, and remain in this view.)

BRAND-ONLY TOP 10 (MAIN) marketplaces set aside

#	Brand	Origin	AI Score
1	**Carmen**	TR	73.4
2	adL	TR	63.9
3	AlfaBeta	TR	62.5
4	VznModa	TR	61.7
5	Koton	TR	56.6
6	Abiyefon	TR	56.0
7	Iconas Line	TR	53.4
8	Eser Giyim	TR	53.1
9	ModaSelvim	TR	53.1

(cont.)

#	Brand	Origin	AI Score
10	Pronovias	Foreign	52.9

With the aggregators set aside, the top of the market is Carmen, adL, AlfaBeta, VznModa and Koton — all Turkish — with Pronovias the highest-placed foreign brand.

3.3 Local leaderboard — 33 qualified brands (Turkish-only questions)

When the 20 questions that explicitly ask for Turkish/yerli brands are isolated, the shelf is entirely domestic — all 33 qualified brands are Turkish.

TABLE 2 — AI VISIBILITY SCORE (LOCAL) 20 questions · 497 responses

#	Brand	Origin	AI Score
1	**Trendyol**	TR	85.2
2	Carmen	TR	82.4
3	AlfaBeta	TR	71.8
4	Sefamerve	TR	69.5
5	adL	TR	64.6
6	Koton	TR	61.7
7	Modanisa	TR	61.6
8	VznModa	TR	60.8
9	Kenzel	TR	60.5
10	GIZIA	TR	59.2
11	Abiyefon	TR	58.3
12	Eser Giyim	TR	55.8
13	Iconas Line	TR	54.6
14	Roman	TR	54.3
15	ModaSelvim	TR	53.7
16	Hepsiburada	TR	53.1
17	Rengin	TR	52.6
18	Lafaba	TR	50.5
19	Lacrima	TR	50.4
20	Yeşim Gelinlik	TR	49.6
21	Cengiz Aktürk	TR	49.5
22	Nurmelek	TR	49.2
23	The ZKS	TR	49.2

(cont.)

#	Brand	Origin	AI Score
25	Eyyo	TR	43.9
26	Trendyolmilla	TR	42.8
27	EKOL	TR	42.6
28	Ömür Inn	TR	40.1
29	LCW	TR	37.5
30	Hülya Keser	TR	37.4
31	Arya Moda	TR	34.4
32	Setrms	TR	33.2
33	DeFacto	TR	30.6

AVERAGE

Average score of the 33 qualified local brands: 52.9. All 33 are Turkish — not a single foreign name survives the yerli filter.

Reading. Trendyol (85.2) and Carmen (82.4) again lead, followed by AlfaBeta (71.8), the marketplace Sefamerve (69.5) and adL (64.6). The local cut elevates specialist domestic names: VznModa rises on position again (#8, MRR 0.70 — the highest in the cut). Because the question already constrains the answer to yerli brands, the assistants respond with an all-Turkish list; the clean absence of foreign names shows they recognise “yerli” as a real constraint.

04

SECTION 04

Differences Between Models

All five models agree on the leader — Trendyol — but they differ enormously in breadth: Grok names nearly 9.9 brands per answer and Perplexity reaches the widest vocabulary, while GPT-4o-mini and Claude Haiku stay near 4.

DIFFERENCES BETWEEN MODELS

Same leader, very different breadth

TABLE 3 — WEB SEARCH & REPERTOIRE BY MODEL ~197–200 responses each

Model	Web search	Distinct brands	Brands/answer
GPT-4o-mini	100.0%	99	3.7
Gemini 2.5 Flash-Lite	88.8%	113	6.36
Claude Haiku 4.5	100.0%	109	4.12
Perplexity Sonar	100.0%	154	7.05
Grok 4.3	99.5%	120	9.88

Web search was near-universal: four of the five models searched on essentially every answer; Gemini on 88.8%. The clearest difference is breadth: Grok lists ~9.9 brands per answer and Perplexity reaches the longest tail (154 distinct brands), while GPT-4o-mini (3.7) and Claude Haiku (4.1) name a much more selective set. Gemini (6.4) sits in between. Despite these different answering styles, Trendyol is the most-named entity in every model.

4.2 Each model's most-named brands

Each table gives a model's five most-mentioned entities across its ~200 responses (rate = % of that model's answers naming the brand). Trendyol tops all five models; Carmen is the most consistent runner-up.

GPT-4O-MINI

#	Brand	Mentions	Rate
1	Trendyol	46	23.0%
2	adL	32	16.0%
3	Carmen	29	14.5%
4	Abiyefon	26	13.0%
5	Sefamerve	26	13.0%

GEMINI 2.5 FLASH-LITE

#	Brand	Mentions	Rate
1	Trendyol	83	42.1%
2	Carmen	77	39.1%
3	AlfaBeta	71	36.0%
4	adL	49	24.9%
5	EKOL	43	21.8%

CLAUDE HAIKU 4.5

#	Brand	Mentions	Rate
1	Trendyol	49	24.5%
2	adL	39	19.5%
3	Carmen	31	15.5%
4	VznModa	27	13.5%
5	Sefamerve	24	12.0%

PERPLEXITY SONAR

#	Brand	Mentions	Rate
1	Trendyol	106	53.0%
2	Carmen	73	36.5%
3	ModaSelvim	46	23.0%
4	adL	45	22.5%
5	Sefamerve	38	19.0%

GROK 4.3

#	Brand	Mentions	Rate
1	Trendyol	192	96.0%
2	Carmen	119	59.5%
3	AlfaBeta	113	56.5%
4	Hepsiburada	91	45.5%
5	Kenzel	87	43.5%

4.3 The practical reading

Which entity leads is unusually consistent — Trendyol first, Carmen close behind — but how many brands an answer contains depends heavily on the model. In Grok, Trendyol appears in 96% of answers and the tail is long; in the more selective GPT-4o-mini and Claude Haiku, a long-tail brand's chance of being named is far lower.

05

SECTION 05

Search vs. Memory: Why This Edition Omits the Split

Almost every answer in this run used web search, so there is no meaningful "memory-only" segment to compare against — itself a finding.

SEARCH VS. MEMORY

No memory-only segment to compare

ONE-SENTENCE TAKEAWAY

Almost every answer in this run used web search, so there is no meaningful "memory-only" segment to compare against — itself a finding.

Some earlier Herm.io editions split answers into web-grounded and memory-only segments that produced different leaders. That split does not exist in this run. About 97.7% of the 997 answers returned at least one citation or search result; the "own-knowledge" segment is a handful of responses — far too small to support a comparison. Four of the five models (GPT-4o-mini, Claude Haiku, Perplexity, Grok) searched on 99.5–100% of answers, and only Gemini fell below, at 88.8%.

Because almost all queries used web search, a separate web-search-vs-memory chapter would compare ~974 grounded answers against ~23 ungrounded ones — not a meaningful contrast — so it is intentionally omitted this edition. The takeaway is that, for Turkish evening- and occasion-wear questions, these assistants reach for live web content almost every time. That makes a current, well-structured web presence especially closely tied to visibility here (see Chapter 8).

GROUNDING RATE

We will keep measuring the grounding rate each edition; if a memory-only segment grows, the comparison will return.

06

SECTION 06

Question-Type Ownership

Trendyol leads all three question types, but the runners-up reshuffle — adL is strong on open-ended discovery, while the marketplace Hepsiburada rises on need-driven use-case questions.

QUESTION-TYPE OWNERSHIP

Trendyol leads every type, the field reshuffles

ONE-SENTENCE TAKEAWAY

Trendyol leads all three question types, but the runners-up reshuffle — adL is strong on open-ended discovery, while the marketplace Hepsiburada rises on need-driven use-case questions.

The 40 questions carry no topical sub-categories, so ownership is read through three behavioural types — discovery (general "best / recommended"), attribute (specific qualities — non-creasing, plus-size, a particular fabric or colour) and use_case (occasion-driven — wedding, henna night, graduation, engagement). The table shows the most visible brands within each type (rate = relative to that type's responses).

TABLE 4 — MOST VISIBLE BRANDS BY QUESTION TYPE top 5 · rate within type

#	discovery	attribute	use_case
1	Trendyol — 43.5%	Trendyol — 47.4%	Trendyol — 52.6%
2	adL — 41.8%	Carmen — 31.4%	Carmen — 32.0%
3	Carmen — 35.4%	AlfaBeta — 26.5%	Hepsiburada — 22.5%
4	AlfaBeta — 31.1%	Sefamerve — 19.7%	adL — 19.1%
5	Iconas Line — 20.7%	ModaSelvim — 17.2%	Abiyefon — 18.2%

Reading. Trendyol leads all three types — most heavily on use-case questions (52.6%), where shoppers describe an occasion and the assistants lean on the marketplace's breadth of listings. The runners-up shift by type: adL is unusually strong on discovery (41.8%, second only to Trendyol) when the question is an open "recommend a brand," while Hepsiburada climbs to third on use-case questions (22.5%). Carmen is the most stable non-marketplace name, sitting second or third across all three types.

07

SECTION 07

Open Market: Turkish vs. Foreign

Across origin-neutral questions, 82.4% of mentions go to Turkish brands and only 17.6% to foreign — the most Turkish-dominated split Herm.io has measured, with foreign brands confined to a premium bridal/couture niche.

OPEN MARKET: TURKISH VS. FOREIGN

Turkish owns the shelf, foreign holds a niche

ONE-SENTENCE TAKEAWAY

Across origin-neutral questions, 82.4% of mentions go to Turkish brands and only 17.6% to foreign — the most Turkish-dominated split Herm.io has measured, with foreign brands confined to a premium bridal/couture niche.

This chapter relies only on the 20 open questions with no origin restriction (500 responses) — the only fair basis for comparing Turkish and foreign brands.

7.1 Origin share

ORIGIN SHARE OF MENTIONS — open market · 500 responses

Origin	Share	Mentions	Distinct brands
Turkish (TR)	82.41%	2,370	117
Foreign	17.59%	506	31

The Turkish lead here is not modest — it is decisive: 2,370 Turkish mentions to 506 foreign. Breadth tells the same story — 117 distinct Turkish brands surface in the open market versus 31 foreign. Unlike verticals where domestic and foreign brands trade the origin-neutral shelf evenly, evening and occasion wear in Turkey is answered almost entirely with Turkish names, even when the question does nothing to invite them.

7.2 Open-market top 15 brands (any origin)

TABLE 5 — OPEN-MARKET TOP 15 — 20 questions · 500 responses

#	Brand	Origin	Rate	Score
1	Trendyol	TR	49.2%	96.2
2	Carmen	TR	25.8%	62.7
3	adL	TR	23.6%	61.8
4	Sefamerve	TR	6.6%	58.2
5	Pronovias	Foreign	16.0%	58.1
6	Modanisa	TR	9.2%	56.1
7	Lafaba	TR	17.0%	55.0
8	Chanel	Foreign	5.0%	54.6
9	Tarık Ediz	TR	11.2%	53.3
10	The ZKS	TR	9.2%	53.0
11	Abiyefon	TR	17.0%	52.5
12	ModaSelvim	TR	9.8%	51.7
13	Iconas Line	TR	14.6%	51.0
14	AlfaBeta	TR	18.2%	50.9

(cont.)

#	Brand	Origin	Rate	Score
15	Tozlu	TR	6.0%	50.4

7.3 The pattern: Turkish owns the shelf, foreign holds a premium niche

The individual ranking shows the structure the aggregate hides. The open-market top three are Turkish — Trendyol, Carmen, adL — and the first foreign name is Pronovias at #5, a bridal/couture house. The other foreign qualifiers tell the same story: Chanel (#8 — named rarely but very early, so read cautiously), Elie Saab and Valentino — luxury and couture — alongside two fast-fashion outliers, Zara and Forever New. So when a shopper asks an origin-neutral evening-wear question, the answer is led by Turkish brands and includes a foreign name only when the register turns to high-end bridal or designer gowns.

08

SECTION 08

The Discovery Ecosystem

AI's picture of this market rests first on brands' own websites (65.5% of cited sources) and, above them all, the marketplace trendyol.com — rather than on editorial or review content.

THE DISCOVERY ECOSYSTEM — WHERE AI LEARNS ABOUT BRANDS

Brand-owned first, marketplace on top

ONE-SENTENCE TAKEAWAY

AI's picture of this market rests first on brands' own websites (65.5% of cited sources) and, above them all, the marketplace trendyol.com — rather than on editorial or review content.

8.1 THE 9 MOST-CITED DOMAINS

#	Domain	Citing	Source type
1	trendyol.com	583	Marketplace / Retailer
2	carmen.com.tr	322	Brand-owned site
3	alfa-beta.com.tr	297	Brand-owned site
4	adl.com.tr	241	Brand-owned site
5	iconasline.com	191	Brand-owned site
6	abiyefon.com	178	Brand-owned site
7	lafaba.com	149	Brand-owned site
8	kenzel.com.tr	142	Brand-owned site
9	sefamerve.com	136	Marketplace / Retailer

MOST CITED

The single most-cited domain is trendyol.com (cited by 58.5% of responses), followed immediately by a wall of brand-owned sites — carmen.com.tr, alfa-beta.com.tr, adl.com.tr, iconasline.com, abiyefon.com, lafaba.com, kenzel.com.tr — interleaved with a second marketplace (sefamerve.com) and a long tail of others. Across the run the models cited 355 distinct domains.

8.2 SOURCE-TYPE MIX

Source type	Share
Brand-owned site	65.5%
Marketplace / Retailer	17.7%
Other / long-tail	13.4%
Editorial / Media	1.6%
Social media	1.6%
Forum / UGC	0.3%

8.3 The brand-owned finding

The most striking pattern is concentration on official and marketplace sites: 65.5% of citations point to brands' own domains and another 17.7% to marketplaces/retailers, leaving only small shares for the long tail (13.4%), editorial/media (1.6%), social (1.6%) and forums/UGC (0.3%). The practical reading (a description, not advice): in this market, a current, machine-readable brand site — plus presence on the big marketplaces — appears closely associated with AI visibility, far more so than editorial or review coverage.

09

SECTION 09

What the Patterns Suggest

The most visible names tend to share three things — coverage across all five models, a strong own-site and marketplace web presence, and, for standalone brands, an occasion-wear specialism the assistants can attach to a query.

WHAT THE PATTERNS SUGGEST

Five structural patterns

This chapter is a neutral reading of the data. It describes patterns associated with visibility; it is not advice, a service, or a recommendation, and visibility remains separate from quality.

1. **Breadth is a baseline condition.** 31 of the 33 qualified main-market brands appear in all five models. Brands seen by only three or four models (Trendyolmilla, Hülya Keser) sit lower largely for this reason — broad model coverage is what the most visible brands share.
2. **Mention and position are different things.** Some entities are named often but late (Trendyol, Hepsiburada — high mentions, lower MRR); others are named rarely but early (Sefamerve, VznModa, Eser Giyim — thin mentions, very high MRR). A brand can clear the 5% bar mainly on position and breadth; “named often” and “named early” are independent signals.
3. **Web presence tracks with the dominant scenario.** With 97.7% of answers grounded in web search, and brand-owned plus marketplace sites the largest source types (83% combined), a current and structured web presence is the factor most closely associated with visibility here.
4. **The shelf is aggregator-led, but a brand can still lead.** No standalone brand outranks the marketplaces overall, yet Carmen shows a specialist can sit second across the whole market and lead the brand-only view — visible across every model and every question type. A brand’s context matters as much as its overall rank.
5. **Origin is settled here, not contested.** Evening and occasion wear is answered almost entirely with Turkish names (82.4% of open-market mentions). Foreign visibility is real but narrow — premium bridal and couture. The local/open gap shows the assistants can distinguish “yerli” requests; the very Turkish open balance is therefore a real market signal, not an artefact.

How a brand can locate itself in the data

Using the dataset (available on request), a brand can read four things in order: whether it appears in all five models; how often it is mentioned within its cut; how early it is named when mentioned; and which model or question type it is weakest in. These readings show where a visibility gap sits — without saying anything about whether its product is good.

10

SECTION 10

Limitations and Notes

This is a single, point-in-time snapshot of one Turkish vertical; read the figures within the limitations below.

LIMITATIONS AND NOTES

How to read the findings

- **Single, point-in-time measurement.** Collected in one run on 4 July 2026 — a snapshot, not a trend. This is the first (baseline) edition; quarterly editions will enable trend analysis.
- **Small-sample position inflation.** A few brands clear the 5% bar but rank high mainly on position and breadth despite thin mentions (e.g. VznModa in the main and local cuts, Chanel in the open cut). Read their ranks cautiously.
- **Small score gaps are not meaningful.** In the packed middle of each leaderboard, differences of a point or two should not be over-interpreted; only larger gaps (such as Trendyol's lead) are robust.
- **Visibility is not quality.** This report measures only mention and position. It does not assess whether a brand was described positively, whether a recommendation was accurate, or whether a product is good. A score is not an endorsement.
- **Models are probabilistic.** The same question can produce different answers; five repeats reduce but do not eliminate this.
- Web search depends on momentary conditions — the content indexed and served at measurement time. "Web search vs. own knowledge" is a proxy based on whether a citation accompanied the answer.
- **Precision over recall.** Brand matching was cautious to avoid false positives; brands mentioned indirectly may be undercounted. There is no sentiment layer — the study is strictly quantitative.
- **Source-type mix is heuristic.** Domain types were auto-classified (brand-owned detected by matching the domain to a brand); treat the mix as indicative. Source coverage also varies by model, and Gemini's real source domains are read from its search-result titles rather than its redirect URLs.
- **Origin classification involves judgment.** A brand is Turkish only if founded and headquartered in Turkey; some widely-sold names are foreign-origin even with a large local presence.
- **Marketplaces/retailers are included as entities** per study scope (Trendyol, Hepsiburada, Modanisa, Sefamerve, Boyner); they compete differently from direct brands, so §3.2 gives a brand-only view. Koton, LCW and Roman are treated as brands.
- **Output-length limits and model versions** differ and date quickly; findings are specific to the versions in Chapter 2 as of July 2026.

11

SECTION 11

Appendix & Data

The study's 40 questions, all 191 tracked brands, data availability, and about Herm.io.

APPENDIX & DATA

11.1 All questions (40) and their categories

All 40 questions used in the study. Scope: 20 local (ask for yerli brands), 20 open (origin-neutral).

#	Type	Scope	Question (Turkish)
1	discovery	open	abiye elbise önerisi
2	discovery	open	en iyi abiye markaları
3	discovery	open	davet elbisesi nereden alınır
4	discovery	open	şık gece elbisesi hangi marka iyi
5	discovery	open	mezuniyet elbisesi markaları
6	discovery	open	düğün misafiri için elbise nereden bakılır
7	discovery	open	tesettür abiye hangi siteden alınır
8	discovery	local	iyi bir yerli abiye markası var mı
9	discovery	local	türk malı davet elbisesi önerir misin
10	discovery	local	yerli tesettür abiye nereden alınır
11	discovery	local	yerli mezuniyet elbisesi önerisi
12	discovery	local	Türk markalarından şık gece elbisesi
13	discovery	local	kaliteli yerli abiye nereden bakayım
14	discovery	local	davet elbisesi için yerli marka arıyorum
15	attribute	open	uygun fiyatlı kaliteli abiye
16	attribute	open	saten abiye hangi marka iyi
17	attribute	open	zayıf gösteren abiye elbise önerisi
18	attribute	open	göbek ve basen kapatan abiye nereden alınır
19	attribute	open	büyük beden abiye güzel duran markalar
20	attribute	open	kısa boylular için abiye önerisi
21	attribute	open	yazın terletmeyen abiye elbise
22	attribute	local	uygun fiyatlı yerli abiye markası
23	attribute	local	yerli saten abiye arıyorum
24	attribute	local	türk malı büyük beden abiye önerisi
25	attribute	local	iç göstermeyen astarlı yerli abiye nereden alınır
26	attribute	local	kaliteli kumaşlı yerli davet elbisesi
27	attribute	local	yerli tesettür abiye zayıf gösteren modeller
28	use_case	open	arkadaşımın kır düğünü için elbise önerisi

(cont.)

#	Type	Scope	Question (Turkish)
29	use_case	open	salon düğününde giymelik uzun abiye
30	use_case	open	nikah için sade beyaz elbise nereden alınır
31	use_case	open	kına gecesi için kırmızı elbise önerisi
32	use_case	open	oğlumun mezuniyetinde giyeceğim şık elbise
33	use_case	open	hamile abiye nereden bulunur
34	use_case	local	yerli markalardan mezuniyet elbisesi bakıyorum
35	use_case	local	türk malı kına elbisesi önerir misin
36	use_case	local	yerli markadan anne abiyesi arıyorum
37	use_case	local	evde söz için sade yerli elbise
38	use_case	local	tesettürlü biri için yerli düğün abiyesi
39	use_case	local	yerli marka kısa mezuniyet elbisesi
40	use_case	local	Türk markalarından nikah sonrası yemek elbisesi

Distribution: 14 discovery, 13 attribute, 13 use_case; 20 local (Turkish-only) and 20 open (origin-neutral).

11.2 All tracked brands (191)

The table below lists all 191 brands tracked in the study (158 Turkish, 33 foreign), ordered by mention count in the main market. Rate is within the main market; brands ≥5% are marked Ranked.

Brand	Origin	Ment.	Rate	Models	Status
Trendyol	TR	476	47.74%	5	Ranked
Carmen	TR	329	33.00%	5	Ranked
AlfaBeta	TR	250	25.08%	5	Ranked
adL	TR	233	23.37%	5	Ranked
Abiyefon	TR	168	16.85%	5	Ranked
Hepsiburada	TR	159	15.95%	5	Ranked
Iconas Line	TR	156	15.65%	5	Ranked
Kenzel	TR	141	14.14%	5	Ranked
Koton	TR	133	13.34%	5	Ranked
Rengin	TR	132	13.24%	5	Ranked
Modanisa	TR	131	13.14%	5	Ranked
Sefamerve	TR	130	13.04%	5	Ranked
ModaSelvim	TR	118	11.84%	5	Ranked

(cont.)

Brand	Origin	Ment.	Rate	Models	Status
Lafaba	TR	114	11.43%	5	Ranked
Cengiz Aktürk	TR	106	10.63%	5	Ranked
GIZIA	TR	97	9.73%	5	Ranked
LCW	TR	95	9.53%	5	Ranked
EKOL	TR	94	9.43%	5	Ranked
Pronovias	Foreign	90	9.03%	5	Ranked
Lacrima	TR	88	8.83%	5	Ranked
Trendyolmilla	TR	88	8.83%	4	Ranked
The ZKS	TR	77	7.72%	5	Ranked
Hülya Keser	TR	72	7.22%	3	Ranked
Tarık Ediz	TR	72	7.22%	5	Ranked
VznModa	TR	71	7.12%	5	Ranked
Boyner	TR	64	6.42%	5	Ranked
Zara	Foreign	64	6.42%	5	Ranked
Eser Giyim	TR	53	5.32%	5	Ranked
Eyyo	TR	52	5.22%	5	Ranked
Setre	TR	52	5.22%	5	Ranked
Setrms	TR	51	5.12%	5	Ranked
Ömür Inn	TR	50	5.02%	5	Ranked
DeFacto	TR	49	4.91%	5	Tracked
Dekolte	TR	46	4.61%	5	Tracked
Arya Moda	TR	44	4.41%	3	Tracked
BSL	TR	44	4.41%	5	Tracked
Yeşim Gelinlik	TR	43	4.31%	5	Tracked
ModaZehrada	TR	40	4.01%	5	Tracked
Ardanewline	TR	39	3.91%	5	Tracked
Modacadiri.com	TR	39	3.91%	5	Tracked
TuvidXXL	TR	37	3.71%	5	Tracked
Tozlu	TR	35	3.51%	5	Tracked
esergiyim.com.tr	TR	35	3.51%	4	Tracked
Beyyoglu	TR	34	3.41%	3	Tracked

(cont.)

Brand	Origin	Ment.	Rate	Models	Status
Forever New	Foreign	33	3.31%	5	Tracked
Aysa Tekin	TR	32	3.21%	4	Tracked
Pazarium	TR	30	3.01%	5	Tracked
Pierre Cardin	Foreign	30	3.01%	5	Tracked
Elie Saab	Foreign	28	2.81%	5	Tracked
Nurmelek	TR	28	2.81%	4	Tracked
Kıyafet Sepeti	TR	27	2.71%	5	Tracked
Tesetturisland	TR	27	2.71%	4	Tracked
Valentino	Foreign	27	2.71%	5	Tracked
Esma Karadağ	TR	26	2.61%	3	Tracked
Nursenamoda	TR	26	2.61%	4	Tracked
Chanel	Foreign	25	2.51%	4	Tracked
Nefeli Store	TR	24	2.41%	3	Tracked
Oleg Cassini	Foreign	23	2.31%	2	Tracked
PodyumPlus	TR	23	2.31%	4	Tracked
Şeref Vural	TR	23	2.31%	5	Tracked
Dior	Foreign	21	2.11%	4	Tracked
Marchesa	Foreign	21	2.11%	4	Tracked
Saygı Giyim	TR	21	2.11%	3	Tracked
Beymen	TR	20	2.01%	2	Tracked
Givenchy	Foreign	20	2.01%	4	Tracked
Mango	Foreign	20	2.01%	5	Tracked
Nursena Moda	TR	20	2.01%	4	Tracked
Denizbutik	TR	19	1.91%	4	Tracked
Hürrem Aldinç	TR	19	1.91%	4	Tracked
Ilmio	TR	19	1.91%	5	Tracked
Invidiaxclsv	TR	19	1.91%	4	Tracked
Accort	TR	18	1.81%	3	Tracked
Manuka	TR	18	1.81%	3	Tracked
Nur Karaata	TR	18	1.81%	4	Tracked
Sarar	TR	18	1.81%	5	Tracked

(cont.)

Brand	Origin	Ment.	Rate	Models	Status
hm.com	Foreign	18	1.81%	4	Tracked
Hüseyin Baştürk	TR	17	1.71%	3	Tracked
Armani Privé	Foreign	16	1.60%	3	Tracked
By Saygı Giyim	TR	16	1.60%	3	Tracked
Vakko	TR	16	1.60%	5	Tracked
Şule Giyim	TR	16	1.60%	4	Tracked
Dekolte Shop	TR	15	1.50%	5	Tracked
Egelin	TR	15	1.50%	5	Tracked
Hanezza	TR	15	1.50%	3	Tracked
Giorgio Armani Privé	Foreign	14	1.40%	3	Tracked
Gökçe Moda Evi	TR	14	1.40%	3	Tracked
Zuhair Murad	Foreign	14	1.40%	4	Tracked
GILLA'S QUEEN	TR	13	1.30%	5	Tracked
Olaabiye	TR	13	1.30%	4	Tracked
Styling Park	TR	13	1.30%	3	Tracked
Abiyenial	TR	12	1.20%	2	Tracked
HEPDOLU	TR	12	1.20%	3	Tracked
Lamia Giyim	TR	12	1.20%	3	Tracked
Machka	TR	12	1.20%	3	Tracked
Modavina	TR	12	1.20%	3	Tracked
Network	TR	12	1.20%	4	Tracked
İpekyol	TR	12	1.20%	4	Tracked
Lilas XXL	TR	11	1.10%	3	Tracked
Senanur	TR	11	1.10%	3	Tracked
Zena Fashion	TR	11	1.10%	3	Tracked
Amine Hüma	TR	10	1.00%	3	Tracked
Dilekyaldiz	TR	10	1.00%	3	Tracked
Dreamon	TR	10	1.00%	2	Tracked
Elben Moda	TR	10	1.00%	3	Tracked
Love My Body	TR	10	1.00%	1	Tracked
MegaButik	TR	10	1.00%	2	Tracked

(cont.)

Brand	Origin	Ment.	Rate	Models	Status
Meliha Tarhanaci	TR	10	1.00%	2	Tracked
Nefelistore	TR	10	1.00%	2	Tracked
SpringStore	TR	10	1.00%	1	Tracked
Tubabutik	TR	10	1.00%	3	Tracked
Zenabiyem	TR	10	1.00%	2	Tracked
Aryamoda	TR	9	0.90%	2	Tracked
Ladyspecial	TR	9	0.90%	3	Tracked
Moda Çelikler	TR	9	0.90%	3	Tracked
Ruris	TR	9	0.90%	3	Tracked
Seçil Store	TR	9	0.90%	1	Tracked
Tarzkadin	TR	9	0.90%	2	Tracked
Tommy Hilfiger	Foreign	9	0.90%	3	Tracked
Züleyha Kuru	TR	9	0.90%	2	Tracked
Azazie	Foreign	8	0.80%	2	Tracked
Cercistr	TR	8	0.80%	1	Tracked
Davetcokelbisemyok	TR	8	0.80%	2	Tracked
Haza Moda	TR	8	0.80%	1	Tracked
Lenta Moda	TR	8	0.80%	1	Tracked
Nurtuba	TR	8	0.80%	3	Tracked
Tiara	TR	8	0.80%	3	Tracked
ASOS	Foreign	7	0.70%	4	Tracked
AbiyeElbisecim	TR	7	0.70%	2	Tracked
Aker	TR	7	0.70%	2	Tracked
Arzukaprol	TR	7	0.70%	3	Tracked
Karaca	TR	7	0.70%	2	Tracked
Musemma	TR	7	0.70%	2	Tracked
Opera Pasajı	TR	7	0.70%	2	Tracked
Shein	Foreign	7	0.70%	2	Tracked
Armani Exchange	Foreign	6	0.60%	2	Tracked
Beyliss	TR	6	0.60%	2	Tracked
Explosion	TR	6	0.60%	2	Tracked

(cont.)

Brand	Origin	Ment.	Rate	Models	Status
Karl Lagerfeld	Foreign	6	0.60%	2	Tracked
Modailgi	TR	6	0.60%	3	Tracked
Pepe Jeans	Foreign	6	0.60%	3	Tracked
Spazio	TR	6	0.60%	3	Tracked
Tofisa	TR	6	0.60%	2	Tracked
Armine	TR	5	0.50%	3	Tracked
Behice Sağlam	TR	5	0.50%	2	Tracked
David's Bridal	Foreign	5	0.50%	1	Tracked
Hüma Store	TR	5	0.50%	1	Tracked
JULYTWO	Foreign	5	0.50%	1	Tracked
Lentamoda	TR	5	0.50%	1	Tracked
Leyuze Boutique	TR	5	0.50%	1	Tracked
Modasena	TR	5	0.50%	1	Tracked
Newyorkdress	Foreign	5	0.50%	1	Tracked
Nihan	TR	5	0.50%	2	Tracked
Oscar de la Renta	Foreign	5	0.50%	2	Tracked
Patirti	TR	5	0.50%	3	Tracked
Paulmark	TR	5	0.50%	1	Tracked
Piennar	TR	5	0.50%	1	Tracked
Yusemtesettur.com	TR	5	0.50%	1	Tracked
Al Tatari	TR	4	0.40%	1	Tracked
Dodysdresses	Foreign	4	0.40%	1	Tracked
Faik Sönmez	TR	4	0.40%	3	Tracked
Hanimefendiabiye	TR	4	0.40%	2	Tracked
JC Penney	Foreign	4	0.40%	1	Tracked
KOZAC	TR	4	0.40%	1	Tracked
Mervems.com	TR	4	0.40%	1	Tracked
Moda Babil	TR	4	0.40%	1	Tracked
ModaMerve	TR	4	0.40%	1	Tracked
Modatalika	TR	4	0.40%	2	Tracked
Monowella	TR	4	0.40%	3	Tracked

(cont.)

Brand	Origin	Ment.	Rate	Models	Status
Pınar Şems	TR	4	0.40%	1	Tracked
Tuğba	TR	4	0.40%	2	Tracked
Twist	TR	4	0.40%	2	Tracked
Wholeskop	TR	4	0.40%	2	Tracked
4. Yeşim Gelinlik	TR	3	0.30%	1	Tracked
Alisse nuerA	TR	3	0.30%	2	Tracked
Aşkın Göksu	TR	3	0.30%	2	Tracked
Bezen Store	TR	3	0.30%	1	Tracked
Deep Atelier	TR	3	0.30%	1	Tracked
Exquise	Foreign	3	0.30%	1	Tracked
Hamit Bey	TR	3	0.30%	1	Tracked
Jovani	Foreign	3	0.30%	1	Tracked
Kayra	TR	3	0.30%	2	Tracked
Mercimsfancy	TR	3	0.30%	3	Tracked
Michelle Mason	Foreign	3	0.30%	1	Tracked
Modavitrini	TR	3	0.30%	2	Tracked
My Rental Dress	TR	3	0.30%	1	Tracked
Neva Style	TR	3	0.30%	1	Tracked
Next Turkey	Foreign	3	0.30%	1	Tracked
Suvari	TR	3	0.30%	1	Tracked
Tutku Moda	TR	3	0.30%	2	Tracked
Wejaar	TR	3	0.30%	1	Tracked

11.3 Data availability

The study tracked 191 brands; of these, 33 cleared the 5% threshold in the main market (with 33 qualifying in the local cut and 32 in the open cut). To support scrutiny and reproduction, the underlying data is available on request: response-level brand mentions, all three qualified leaderboards, full unfiltered brand metrics, per-model and per-question-type breakdowns, the open-market breakdown, the top source domains, and the methodology and data dictionary.

All figures reflect a single point-in-time run (4 July 2026) and are subject to the limitations in Chapter 10. This is the first (baseline) measurement; the study will be repeated quarterly.

11.4 About Herm.io & disclosure

Herm.io is a consumer-behavior and marketing-data company. We study how people discover and choose brands so that brands can reach the right customers. This report is part of our public research and is a recurring quarterly study.

DISCLOSURE & NEUTRALITY

Herm.io does not sell SEO or GEO (search/AI-ranking) services, and this report does not recommend any. No brand paid to be included, ranked, or described, and a brand's score is not an endorsement or a judgment of its quality — it is a measure of visibility only. To keep the analysis objective, all citations to Herm.io's own domains were excluded from the source data.

REPORT PERIOD

July 2026 · Edition 1 (baseline) of a quarterly series.