Future Commerce

SIGNAL REPORT



Celebrity Brands

Are celebrity founders doing the work in the new age of influence?

A SIGNAL REPORT BY FUTURE COMMERCE

RESEARCH WITH Merciv

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Product quality decides how long a celebrity brand lasts

Celebrities are increasingly starting and funding their own brands. They serve as media platforms, distribution channels, sales channels and, in some cases, equity holders. This market has reshaped retail's competitive landscape around the tastes and aesthetics of individuals.

Future Commerce and Merciv set out to find the limits of that influence. Would consumers give up money, effort, and quality to back a product because their favorite celebrity was behind it? A celebrity's name does its work early, in winning funding and retail doors. After the first purchase, product quality decides whether a customer comes back.

Even if your brand doesn't associate with celebrity in any capacity, it is still worth understanding this space and how it shapes the way consumers respond to brand positioning, marketing campaigns, and even product innovation. If consumers are being programmed to consider and purchase products solely because a celebrity is attached, that will seismically shift how our digital and physical aisles are merchandised in the future.

THE COMMERCIAL QUESTION

BEFORE PURCHASE	AFTER PURCHASE
Capital and partners	Product performance
Retail access	Price and perceived value
Awareness and discovery	Delivery and service

Celebrity helps most before the first purchase. After it, the product and the service carry the brand.

Product talk outweighs persona talk by 8× to more than 1,000×.

Across more than 594,000 first-party reviews of thirteen celebrity-founded brands, buyers wrote about the product far more often than the person behind it. **See page 14.**

Future Commerce / Merciv · Celebrity Brands research; first-party review analysis, 594,000+ reviews across 13 brands.

Where celebrity influences the customer journey

New celebrity brands keep entering the market, and a fair share flounder. What actually dictates success? We first set out to model how trust, celebrity involvement, and scale relate. Merciv's data told a clearer story: where the value of celebrity ends, and where the business model and the product take over.

THE EIGHT-STAGE JOURNEY / DOES CELEBRITY HELP?

01 CAPITAL ACCESS

Likely

CONFIDENCE: DIRECTIONAL

Celebrity capital lowers perceived risk; higher multiples reported. No matched-control benchmark.

02 RETAIL DISTRIBUTION

Yes

CONFIDENCE: HIGH

7–10 years of CPG distribution compressed to 2–3. Prime shelf space before sales history.*

03 AWARENESS / DISCOVERY

Yes

CONFIDENCE: HIGH

Founder search: 68× / 37× / 30×. MrBeast 138.1M followers; Feastables 4.5M. [S1]

04 TRIAL

Partly

CONFIDENCE: MODERATE

47% bought on an influencer recommendation; 58% because of an endorsement. [R91]

05 CONSIDERATION

No

CONFIDENCE: HIGH

26% do not trust influencers; 5% trust completely. [R91] "Nepo / overhyped / mid."

06 PURCHASE DECISION

No

CONFIDENCE: MODERATE

18% of buyers can name the founder. [R92] No lift in purchase intention or product attitude.

07 REPEAT / RETENTION

No

CONFIDENCE: MODERATE

Recommendation: beauty 75% vs 81%; food & beverage 60% vs 79%. [R92]

08 ADVOCACY

Negative

CONFIDENCE: DIRECTIONAL

Founder ethics color product judgment, as with Feastables.

Merciv's qualitative assessment of celebrity contribution across the customer journey. Confidence reflects the supporting evidence.
* Retail distribution timeframes in years are separate from the launch-to-wholesale measure on page 08.



Fame helps most before the purchase.

Celebrity reliably opens capital, retail doors, and awareness. From consideration onward, the evidence shows little or no lift, and founder controversy can drag on advocacy.

[S1] Merciv search/TikTok data. [R91] BBB National Programs. [R92] Numerator. Framework: Future Commerce / Merciv.

Five operating principles

Across capital, distribution, trial, conversation and experience, the evidence points to one pattern. Fame does its heaviest lifting before a product reaches the shelf. After that, the product carries more of the load at every step.

FAME DOES THE WORK → THE PRODUCT DOES THE WORK

01

CAPITAL

Attention and marketability lower the perceived risk for investors.

A built-in audience makes a celebrity brand easier to fund, though no matched benchmark yet proves better returns.

02

DISTRIBUTION

Personal reach gets product to the shelf faster.

Celebrity brands reached retail wholesale in a median 5.1 months, against 21.8 for other brands.

03

TRIAL

Curiosity drives the first purchase, even among skeptics.

Nearly 60% of consumers say they are skeptical of celebrity brands, and beauty buyers try them anyway.

04

CONVERSATION

Aesthetic signal and cultural fit start word of mouth.

Rhode's glazed, peptide and pocket-blush vocabulary travels through its customers, well beyond its own posts.

05

EXPERIENCE

Product value and efficacy earn the repeat purchase.

In reviews, product talk outweighs persona talk by 8× to more than 1,700×.

Framework: Future Commerce / Merciv, built from the search, social, wholesale and review evidence in this report.

Five paths to market, different responsibilities

Celebrities and mega influencers have five paths to market, each with different levels of oversight and IP control. The operating model dictates the brand's future: how much risk the celebrity carries, and how much control they have over the long-term vision.

CONTROL, CAPABILITY, AND EXPOSURE

MODEL	CONTRIBUTION / OPERATING ENGINE	RISK / WHAT TO EXAMINE	EXAMPLES
Holding / investment platform	A celebrity-controlled platform deploys IP, audience, or capital across a portfolio.	**Highest.** Overextension; diluted equity and trust.	SKKY Partners; Serena Ventures; HartBeat Ventures; 11:11 Media
License without operational control	The celebrity licenses name or IP; a specialist develops, makes, and distributes the product.	**High.** Quality control and product fit.	Authentic Brands Group celebrity portfolio; MrBeast Burger
Celebrity-fronted operator	A third-party business supplies operations; the celebrity brings audience, creative direction or cultural relevance.	**High.** Operator decisions land on the founder.	PRIME; Florence by Mills; Fenty Beauty
Acquisition / continued founder role	An acquirer adds capital and infrastructure; the celebrity typically retains ownership and creative decisions.	**Moderate.** Valuation and growth risk sit with the acquirer.	Kylie Cosmetics; Aviation Gin; Rhode
Founder + professional operator	The celebrity remains a founder and owner, working with experienced executives and partners.	**Low.** The founder owns every decision and the financial exposure.	SKIMS; Teremana; Cécred; PATTERN

Illustrative arrangements; models can overlap or change over time. Rhode appears in founder-led and acquired phases. [R10]

[R10] e.l.f. Beauty · Rhode acquisition announcement. Ownership models: Future Commerce / Merciv.

“

I just wanted to create a tight edit of really great products.”

HAILEY BIEBER

FOUNDER, RHODE / SPEAKING TO MARIE CLAIRE UK



A shorter path to retail

Celebrity name and recognition clearly draw investors and operating partners. Merciv found that 17 celebrity brands studied moved from initial launch to retail wholesale partners in a median 5.1 months, compared with 21.8 months for non-celebrity brands.

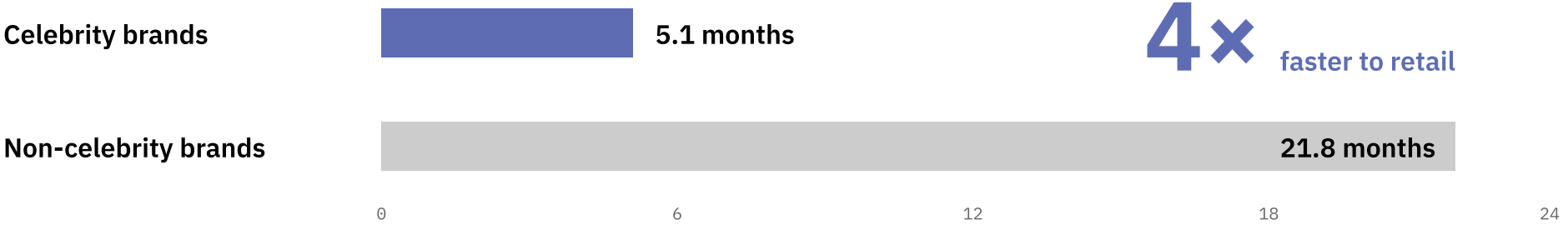
A third of celebrity brands analyzed launched directly into national retail, without having a ramp-up period in DTC. For example, Dwayne Johnson's personal care brand Papatui launched nearly simultaneously on its own DTC site, in 1,900 Target stores, and on the retailer's website. [R93]

Celebrity status opens the door to funding, top executive talent, and a robust operational foundation; together, these factors let brands skip that DTC "verification period" and immediately begin their journey to retail expansion. Papatui is already being praised as a boon for Target, and has quickly become one of the retailer's top-selling men's grooming brands. [R94, R95]

Speed to shelf is the clearest celebrity advantage.

Brands without a famous founder can borrow some of it. Category experts, scientists and authors lend a launch credibility.

MONTHS FROM LAUNCH TO FIRST WHOLESALE PARTNER



Median time from launch to a first retail wholesale partner. Merciv analysis of 17 celebrity brands against a non-celebrity benchmark.

Merciv · Wholesale analysis (n=17). [R93] WWD. [R94] Target. [R95] PAPATUI.

Search follows the founder far more than the brand

For most celebrity brands, the founder's name draws far more searches than the brand itself.

Celebrities bank on attention and attraction. They use their name and likeness to generate demand for brand partners through social posts and omnichannel campaigns. But how does their online presence transfer to the brands they launch, if at all? The data shows that celebrity rarely carries over completely.

Across 36 brands analyzed for our Index, the median founder draws 12.4 times as many US monthly searches as the brand they founded. Only two brands have broken from their founders' shadows: SKIMS and Fabletics. [S1]

12.4×

Median founder-to-brand US monthly search ratio across 36 pairs. [S1]

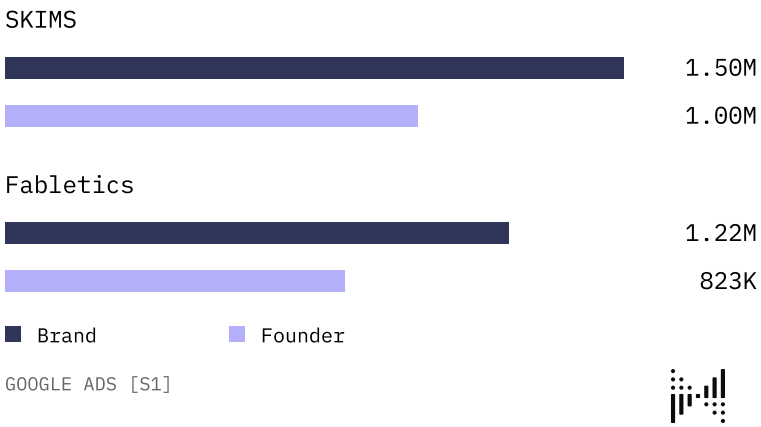
WHAT THIS MEASURES

Selected query volumes measure search activity, not sales, shared audiences, or retention. Generic names and query selection can change the comparison. [S1]

THE EXCEPTIONS / 2 OF 36

SKIMS and Fabletics are the only selected brand queries that exceed founder query volume. [S1]

AVERAGE MONTHLY US SEARCHES

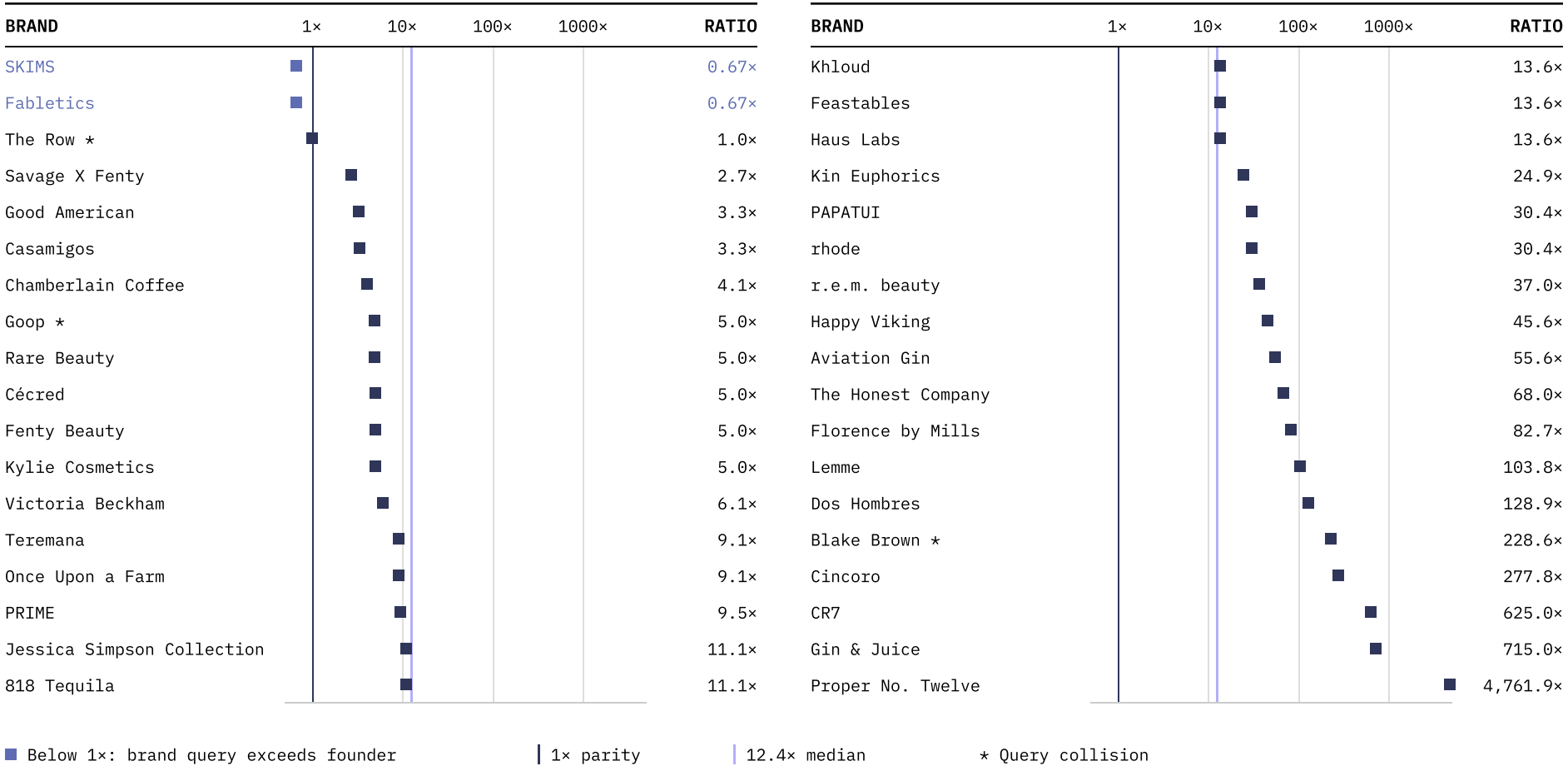


GOOGLE ADS [S1]

[S1] Merciv · Google Ads Keyword Planner, US English, trailing 12-month averages; 27 Aug 2026.

How much bigger is the founder?

Founder query volume ÷ selected brand query volume · 36 celebrity-founded brands



[S1] Merciv assessment · Google Ads Keyword Planner · US English · 27 Aug 2026

Log scale · Trailing 12-month averages. Selected queries, not total brand demand. * Generic-term collisions. Summed founder queries may overlap. Query definitions are in the research data.

[S1] Merciv assessment · Google Ads Keyword Planner · US English · trailing 12-month average · pulled 27 Aug 2026.

A large founder audience is only the beginning

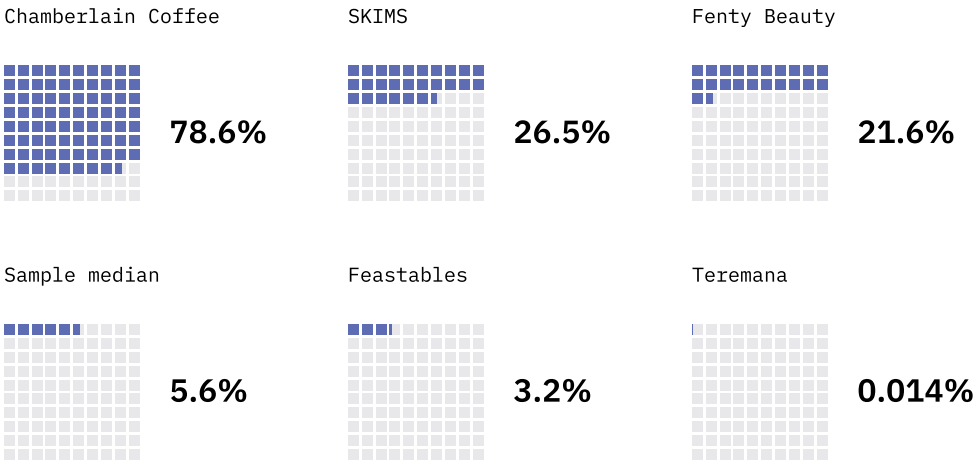
We ran the same comparison using TikTok followers. Across 19 brand and founder account pairs, the median brand follower count is 5.6% of its founder's count, about one-twentieth. The brand's audience is much smaller than the celebrity's. [S1]

Among the brands with the largest follower counts relative to their founders, very few sustain strong video reach. Chamberlain Coffee's brand account is 78.6% of its founder's size [S1], but median video views are 0.15% of its own follower count. Feastables has a much smaller account ratio, at 3.2% [S1], yet reaches 7.15% by the same video measure.

Follower count is a weak proxy for intent. Hate-following is a real phenomenon, and skeptics click on celebrity news out of curiosity. Reach tells a brand who is watching. It says little about who will buy, and for how long.

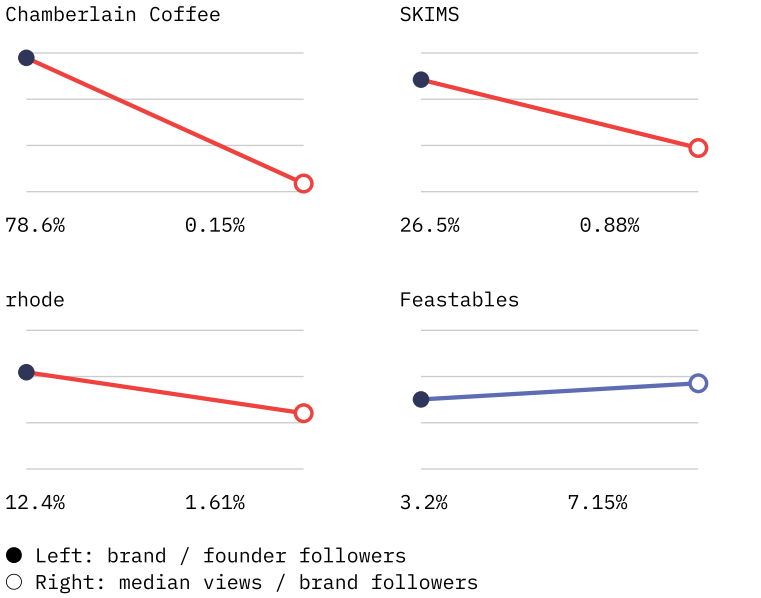
THE BRAND ACCOUNT, RELATIVE TO ITS FOUNDER

Brand followers ÷ founder followers · TikTok



[S1] 19 usable TikTok pairs · 27 Aug 2026.
Account-size ratios do not establish shared followers.

ACCOUNT SIZE VS. POST REACH



Account size [S1]; video reach: Merciv analysis.
Log scale, 0.1–100%; denominators differ.

[S1] Merciv · TikTok account comparison, 27 Aug 2026, n=19. Merciv · Recent-video reach analysis.

Skeptical shoppers still try celebrity brands

Nearly 60% of consumers say they're skeptical of celebrity brands. Up to 44% think celebrities are "just paid," while 39% don't know the founder's genuine role. Only 18% are more willing to try a brand with a celebrity involved, and 12% are more willing to trust one. [S4]

Even so, skeptics still buy. Consumers are more willing to try celebrity brands in accessible, affordable, and sometimes lower-stakes categories, such as beauty. [S4] Reluctance grows in ingestible categories, such as wellness and spirits, where false or misleading efficacy claims raise concern.

Celebrity preference among consumers under 35 has fallen to 8% [R06], yet one in three still admit they are influenced. [R24] Only 18% believe celebrities are heavily involved in product development.

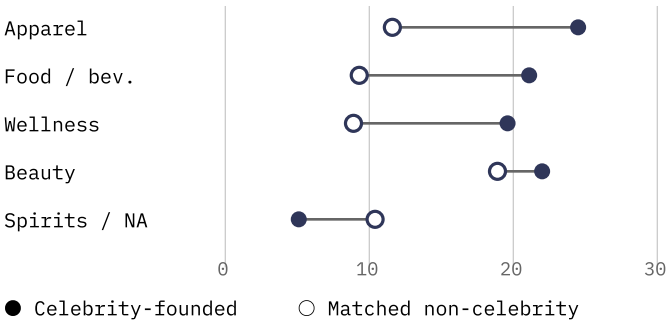
CELEBRITY BACKING WOULD ENCOURAGE TRIAL



Highlight consumer survey · Willingness to try a new brand with celebrity backing, by category. [S4]

DISPERSION OF DEMAND OUTCOMES

Standard deviation points · measures spread only



	CELEB.	MATCHED
Apparel	24.5	11.6
Food / bev.	21.1	9.3
Wellness	19.6	8.9
Beauty	22.0	18.9
Spirits / NA	5.1	10.4

Merciv · 58 brands; control cells n=3–8.
Standard deviation describes spread, not growth or decline.

Visible work builds belief.

Up to 44% of consumers think celebrities are "just paid." Showing the founder's role, from product roadmap to marketing and sales, answers that doubt.

[S4] Highlight · Celebrity-backed brands study. Merciv · Category comparisons. [R06] Amra & Elma. [R24] Ross McCreath. [R25] aytm · Authenticity research.

In beauty, fame is neither shield nor curse

The celebrity-brand category is smaller than the broader creator economy, but it is scaling fast: nearly 60% of celebrity-founded brands launched in the past six years. [R04] Celebrity beauty alone reached about $5.6 billion globally in 2025 and is projected to reach $10.4 billion by 2034. [R03]

A small set of high-trust beauty brands pair credible products with sustained founder involvement, and they have built loyal followings as a result. Beneath them, a long tail of hype-driven lines has stalled or shut down.

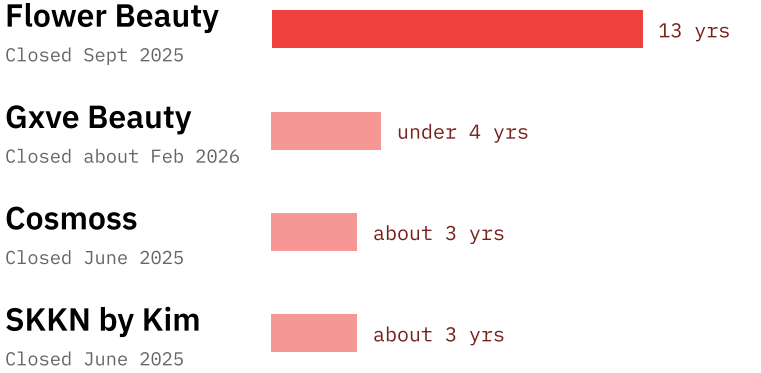
In beauty, celebrity brands are declining in lockstep with non-celebrity brands. Where celebrity brands genuinely polarize is apparel, food, and wellness. These are categories where distribution access and product credibility do the work that fame cannot. And because failed celebrity brands stay searchable long after they stop trading, the segment looks more volatile than the numbers support.

CELEBRITY BEAUTY, GLOBAL MARKET SIZE



Nearly doubles in nine years. [R03]

YEARS ON THE MARKET BEFORE CLOSING



Closure timing as reported; approximate where noted. [R53]

Credible product, visible founder.

Fenty Beauty, Rare Beauty, Rhode, Haus Labs and PATTERN Beauty pair both. Their buyers talk about the product first. **See page 14.**

[R03] MarketIntelo · Celebrity beauty market. [R04] Los Angeles Times. [R53] r/KUWTK · SKKN closure. Closures: Future Commerce / Merciv research.

Post-purchase, the product is the conversation

WHAT REVIEWERS TALK ABOUT: THE FOUNDER VS THE PRODUCT

BRAND	← FOUNDER	PRODUCT →	RATIO
Once Upon a Farm	0.02%	34.95%	1,748×
The Honest Company	0.31%	40.92%	132×
Cécred	1.61%	50.73%	31.5×
PATTERN Beauty	1.87%	56.32%	30.1×
Chamberlain Coffee	1.03%	28.48%	27.7×
Kylie Cosmetics	1.46%	54.35%	23.0×
Rare Beauty	1.71%	32.76%	19.1×
r.e.m. beauty	3.16%	51.51%	16.2×
Fenty Beauty	2.59%	42.04%	16.1×
Lemme	2.09%	30.82%	14.8×
Haus Labs	3.92%	51.23%	13.1×
Feastables	9.01%	90.29%	10.0×
Rhode	4.71%	39.18%	8.3×

Share of reviews mentioning the founder, celebrity or hype (left) and product attributes (right), on one 0 to 100% scale. Ratio = product share ÷ founder share. Merciv first-party review analysis, 594,000+ reviews across 13 brands. Categories may overlap.

MERCIV ANALYSIS

Across more than 594,000 reviews of thirteen celebrity-founded brands, Merciv compared reviews mentioning product attributes with those mentioning the celebrity, founder, or hype. Product talk outweighs persona talk by 8× (Rhode) to more than 1,700× (Once Upon a Farm). After purchase, product quality, delivery speed, and service matter more than the persona's popularity.

Even in cases like PATTERN, where the founder, Tracee Ellis Ross, is highly native to the product category, buyers were more likely to discuss curl definition and product formats than persona salience.

Fame gets it to market. The product keeps it there.

Celebrity helps hedge risk for investors and gets product to shelf faster. After the sale, buyers judge the formula, the delivery and the service.

Six questions shoppers ask about a celebrity brand

Using Merciv, we built a reusable framework for reading celebrity brand discourse. It sorts digital feedback and consumer sentiment into six registers, each one a question shoppers are already asking. The full scores for the four case brands are in the appendix.

01 **LEGITIMACY**

Does this person deserve to sell me this?

Loudest for Rhode and PRIME, where comments question the founder before the product.

02 **SUBSTITUTABILITY**

What is the cheaper version?

“skims dupe” is the highest-volume evaluative search in the study.

03 **VALUE FOR MONEY**

Is it worth it?

Feastables is weighed against Hershey’s, and buyers say they paid twice the price.

04 **EFFICACY AND DURABILITY**

Does it work?

“Broke me out” is the most consistent complaint in Rhode’s reviews. [S79]

05 **SAFETY**

Is this good for me?

PRIME's caffeine-free drink draws 14x times more "is it bad for you" searches per month than the 200mg can.

06 **BODY AND IDENTITY**

What does it make me?

SKIMS is described by the body it produces: snatched, smooth, and sculpted.

[79] Merciv assessment lexicon. Evidence: SKIMS, Rhode, Feastables and PRIME case studies; Comments about breakouts and formula failure lived on Reddit. On Trustpilot, customers complained about operational failure.

Are celebrity founders doing the work?

One brand from each of four paths to market, in four categories: shapewear, skincare, chocolate, and sports drinks. Together they show where fame carries the business and where the product has to.

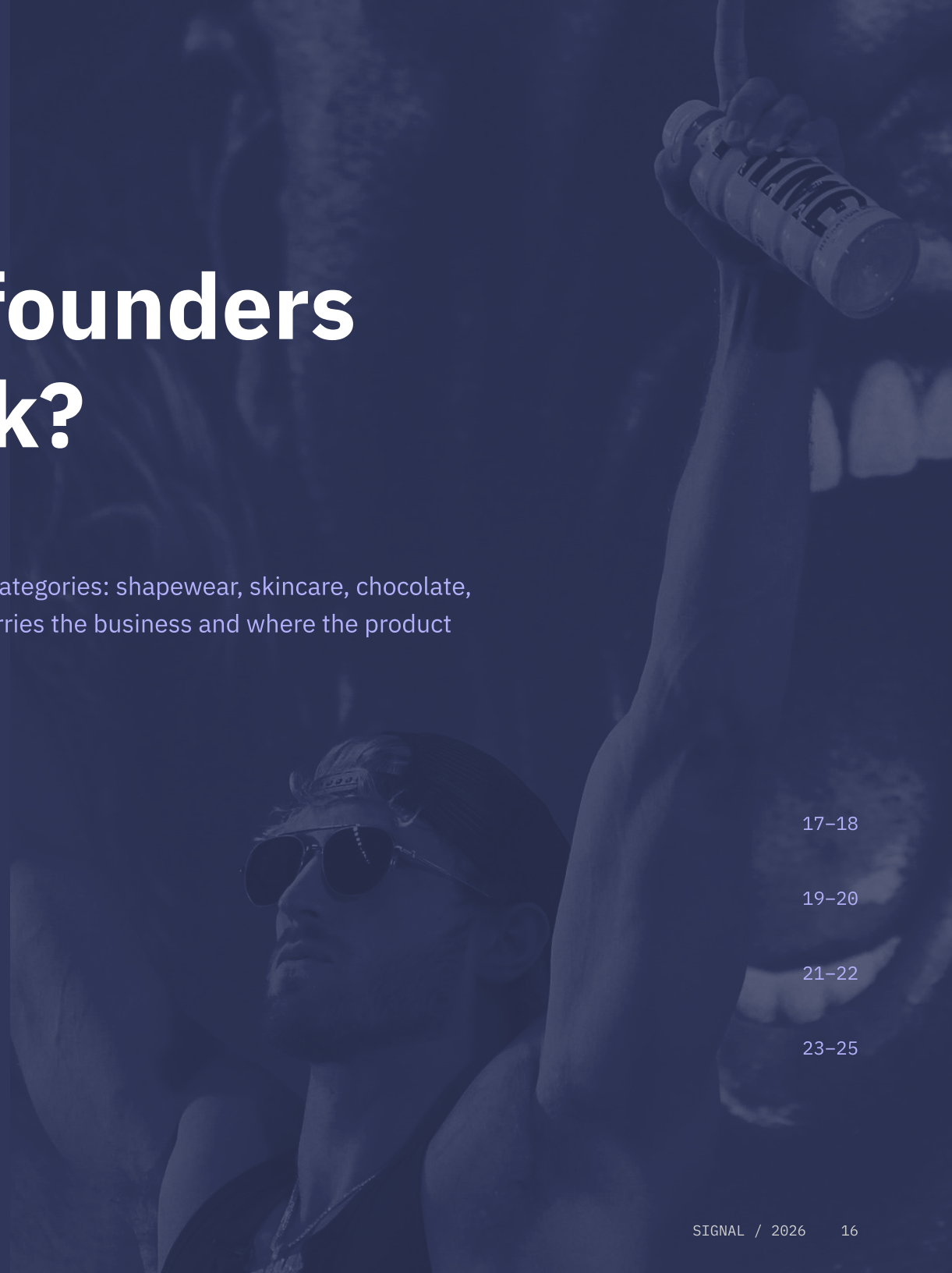
IN THIS CHAPTER

01 / SKIMS 17–18

02 / RHODE 19–20

03 / FEASTABLES 21–22

04 / PRIME 23–25



SKIMS: Snatched, smooth, sculpted

SKIMS draws more brand searches than any other brand in this study.

1.5M

Average monthly US searches for “skims”. [S1]

GOOGLE ADS / MERCIV [S1]

THE PRICE-DEFECTION

“will never spend $58 on a shirt again. bye kimmy”

The top quality post in r/SKIMSbyKKW, with 1,511 upvotes. A companion thread asks, “so what are we buying now that skims is pricing everyone out.”



Image: SKIMS
Official About campaign imagery

SKIMS commands enormous private demand. The modifiers attached to that demand show how the brand is interpreted and recalled: equally by product and by marketing. Kim Kardashian draws 1M monthly searches in the same selected-query comparison. [S1]

SKIMS has become known for carrying the marketing prowess of its founder. And although its collaborations with The North Face and Nike [R74, R75] garner their fair share of attention, SKIMS’ unique model that combines stunt marketing and limited product drops is what carries the most cultural weight.

Where SKIMS is praised, the language centers on physical transformation, which ties directly to product efficacy. “Snatched” was a signature term; a TikTok captioned “Snatched is an understatement” drew 467,857 views. Other key words: “cinch,” “hold,” “smooth,” “sculpt,” “buttery” and “supportive.” [R42, R48] Complaints were physical too, from “rib removal surgery” to an XL that didn’t fit a size 10. [R52]

SKIMS is known for the body it produces, which fits its founder’s brand. It has won the outcome (snatched, smooth, sculpted). The commercial risk is that a brand described only by outcomes will lose customers to cheaper options that deliver the same results.

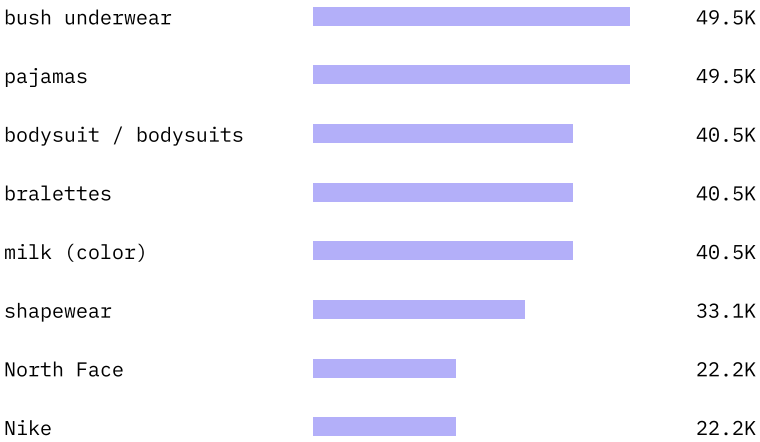
Merciv review and social analysis. [S1] Search pairs. [R42, R48, R52] Product reviews. [R74, R75] Official SKIMS collaborations.

SKIMS: Searching for the dupe

“skims dupe” draws 2,900 searches a month. “skims worth it” draws 20.

THE SEARCH LEXICON

average monthly US searches



All terms begin with “skims.” Average monthly US searches.

MERCIV ANALYSIS

The Dupes are on Amazon.

Social listening finds Amazon as the main destination in the dupe conversation.

For product-specific searches, consumers are searching more for pajamas and loungewear than shapewear. This shift reflects changing consumer tastes and aesthetic preferences. SKIMS was founded with shapewear at its core and remains a shapewear-driven company. However, the brand is driving more interest through adjacent categories that reflect consumers’ shift towards boxier silhouettes and more relaxed-fit fashion.

The top search query also tells us something notable about how SKIMS shows up in consumers’ lives: “skims bush underwear” refers to the Ultimate Bush Thong, a faux-hair string thong that sold for $32. [R76] It was a social media phenomenon, earned mainstream coverage, and sold out in under 24 hours. [R77]

“Dupe” was another defining word. At 2,900 monthly searches, “skims dupe” is the highest-volume evaluative query for any brand in this study. By comparison, “is skims good quality” draws 170. Shoppers have settled the quality question. They want the same result for less.

SKIMS has the lowest product-defect friction of any brand in the study (1.5%) and the highest value friction (4.2%). Its dominant themes are fit (52.4%) and expectation (53.2%), with durability at 26.0%. The problem is price and fit expectations. SKIMS loses customers to substitutes far more often than to defects.

Merciv keyword, review and social analysis. [R76, R77] Us Weekly; Jamaica Observer · Ultimate Bush launch.

Rhode: An aesthetic people can name

CASE 02 / RHODE **1 OF 2 · BRAND & POSITIONING**

Rhode owns a proprietary aesthetic vocabulary that consumers have made their own.

FOUNDER AND SELECTED BRAND SEARCH

average monthly US searches



US English · trailing 12-month average · 27 Aug 2026. Selected query, not total brand demand.

[S1] / MERCIV

A VOCABULARY OF TASTE

Glazed / peptide / pocket blush
Dewy · juicy · plump. Product names and sensory descriptors reinforce the same recognizable aesthetic. [R54]



Rhode’s owned vocabulary is unusually well-established and widely adopted by consumers. Terms like “glazed,” “glazing,” “peptide,” “pocket blush,” “pillowy,” “juicy,” “plump,” “dewy,” “strawberry glaze,” “sugar cookie,” and “espresso” appear well beyond web copy and social posts; the general public has adopted them. [R54]

The most-searched Rhode product is its branded phone case, at a combined 92,900 monthly US searches. It went viral as the perfect holder for the brand’s lip balm. At $38, in limited-edition colorways, the case became a status symbol, a sign that the owner was part of the moment. [R54, R78]

The selected query “rhode skin” averages 14,800 monthly US searches, against 450,000 for Hailey Bieber, a 30.4× founder-to-brand ratio. This comparison uses a defined beauty-brand query because the broader word “rhode” also captures Rhode Island searches. [S1]

Rhode is known for taste and vibes more than results. It owns the most valuable aesthetic vocabulary in this set, and it is also the brand most often asked whether that dominance is earned: “overhyped,” “overrated,” “mid.”

Merciv review/social analysis. [S1] Search pairs. [R54] Marie Claire UK. [R78] rhode Lip Case. Image: rhode [IMG-RH-01].

Rhode: Who gets served first

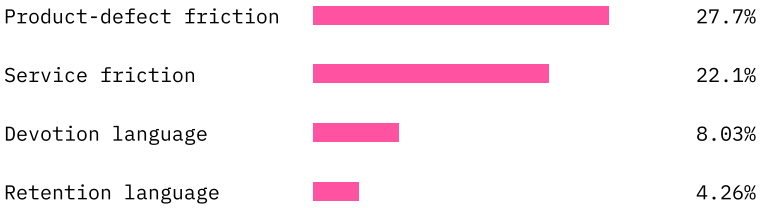
CASE 02 / RHODE

2 OF 2 · PRODUCT & SERVICE

The loudest comments question the founder’s right to sell: “nepo baby brand with connections” drew 81,730 likes.

ATTACHMENT AND FRICTION IN REVIEW LANGUAGE

Share of coded review language, %



Share of coded review language. Categories may overlap; retention language records what reviewers say about returning.

MERCIV ANALYSIS

> **I’m so sick of companies making sure their influencers have their products first over their paying customers.**

A comment with 55,829 likes. A TikTok captioned “The money grab is unmatched” reached 1.85M views.

Rhode’s product conversations are split. The same comment thread contains “My skin has never looked better using Rhode” (7,363 likes) and “I wanna love Rhode so bad because I love Hailey but Rhode broke me out so bad, and I NEVER break out.” “Broke me out” is the most consistent negative product descriptor.

Rhode has a highly influencer-driven marketing model. The brand frequently hosts pop-ups and activations at events like Coachella, where influencers get early access. [R79] For general product launches, the brand uses a rotating set of creators to generate buzz and drive demand. This is a playbook many brands use, but Rhode sparks a clear conversation about who modern beauty brands serve first.

Product reviews tell a different story from the feed. Rhode’s corpus includes 103,099 reviews at a 4.57 average, with the highest devotion (8.03%) and retention language (4.26%) of any scored brand. It also has the highest combined friction in the study: 27.7% defect and 22.1% service. When the brand has to deliver on its credibility promise, it often falls short.

In May 2025, e.l.f. Beauty agreed to acquire Rhode for up to $1 billion [R10], a clear statement of the brand’s legitimacy. But shoppers in stores, online, and in the comments will decide whether that verdict holds.

Merciv review/social analysis. [R10] e.l.f. acquisition announcement. [R79] Fashionista · Coachella activations.

Feastables: Known by the founder

CASE 03 / FEASTABLES

1 OF 2 · BRAND & POSITIONING

Feastables is known for being MrBeast's chocolate brand.

Despite its founder's global reach, Feastables draws 49,500 monthly US searches. MrBeast draws 673,000 in the same selected-query comparison, a 13.6× ratio. [S1]

The top queries identify the product: "bars" at 12,100 monthly US searches, then "chocolate milk" and "MrBeast Feastables" at 6,600 each. Evaluative searches are rare. "Are Feastables good" draws 320 a month.

People seldom evaluate Feastables on its own terms. They weigh it against Hershey's as a possible replacement for a heritage brand. [R60] The top-scoring r/MrBeast thread focuses on taste: "So I tried every Feastables bar... and honestly it just felt like I paid twice the price for a Hershey's bar." (479 upvotes, 138 comments) [R80]

The founder is both the marketing and the product description, so shoppers judge the chocolate by how they feel about him. That produces extraordinary trial and uneven growth. Net revenue reached $215M in 2024 on 33% unit growth. Unit growth then slowed to 13% in 2025 and 2% in 2026. [R46]



ORIGINAL · SEA SALT

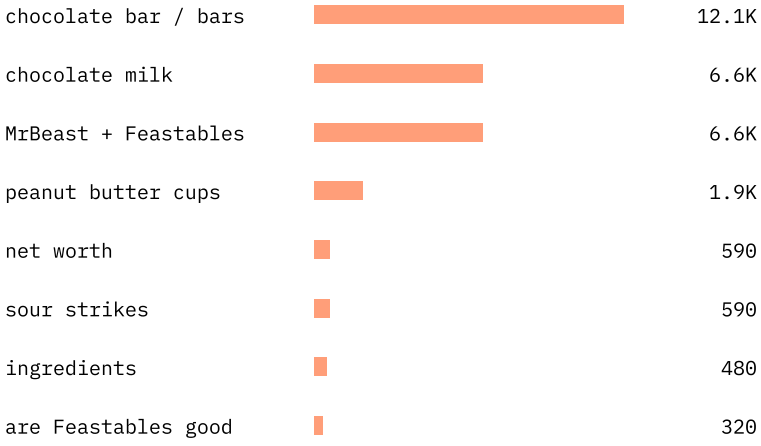


REDESIGNED · MILK CHOCOLATE

Images: Feastables, Our Cocoa Story. Different flavors; packaging hierarchy comparison, not a same-SKU test.

WHAT PEOPLE IDENTIFY FIRST

average monthly US searches



Average monthly US searches. Short labels omit repeated brand names.

MERCIV ANALYSIS

FROM r/MRBEAST

"Finally tried a Feastables, just kind of alright"

301 upvotes. Shoppers who try the bar describe it in lukewarm terms, even when they like the founder.

Merciv consumer analysis. [S1] Search pairs. [R60, R80] r/MrBeast · consumer comparisons and quoted reviews. [R46] Business Insider · Feastables growth.

Feastables: Taste, ethics, and fandom

Shoppers rate the chocolate and the founder in the same breath.

THE SENSORY FRICTION

Share of coded review language, %



Share of coded review language describing taste or texture friction.

MERCIV ANALYSIS

“they be good tho”

For every “gross” or “soulless billionaire” comment, a fan pushes back: “This package was so FIRE.”

Feastables’ dominant friction is taste (37.6%) and texture or refusal (27.0%). The defining adjectives are neither strongly positive nor negative. Words like “meh” and “mid” point to a product set that is so mediocre it’s completely forgettable.

Feastables also has the lowest five-star share of any brand measured at 63.3%, the highest switch-in language at 6.26% (5× the next brand), and the lowest devotion at 1.07%.

Hate registers in 20% of Feastables’ social mentions, the highest of any brand we analyzed. No other brand in this study is discussed in moral terms at this intensity, largely because of Feastables founder Jimmy Donaldson, aka MrBeast. A TikTok titled “Is Feastables Still Ethically Sourced” acquired more than 500K views, and “mrbeast controversy” draws 5,400 monthly searches.

Fandom conversations run in parallel, and fans defend the product as readily as the founder. Feastables keeps real affection. It has yet to turn that affection into strong product advocacy in key digital signals.

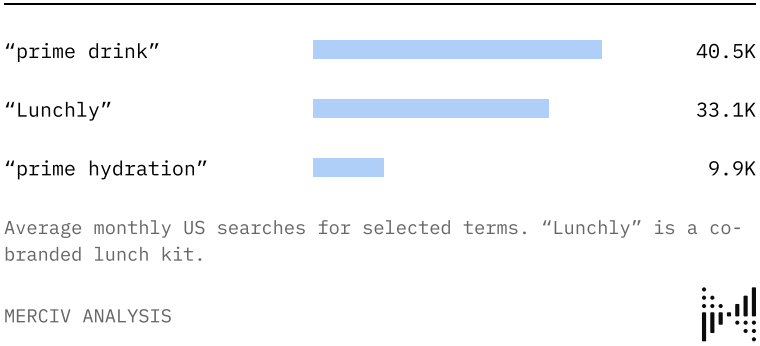
Future Commerce / Merciv · Feastables review and social analysis.

PRIME: One name, several products

Shoppers search for “prime drink” four times as often as the product’s real name.

BROAD NAME, PRODUCT NAME, ADJACENT BRAND

average monthly US searches



Average monthly US searches for selected terms. “Lunchly” is a co-branded lunch kit.

MERCIV ANALYSIS

6.0% of product-term searches name a founder.

“ksi prime” draws 1,900 searches a month and “logan paul prime” 1,300. [S1]



PRIME Hydration
Blue Raspberry
Image: PRIME

PRIME operates a segmented product architecture: Hydration, Hydration+ Sticks, Energy, Zero, Rapid Rehydration, and Shake. [R81] But consumers’ search behavior shows they have no clear differentiation: “prime drink” (40,500/mo) outruns “prime hydration” (9,900/mo) by 4.1×.

The naming problem spreads sideways. “Lunchly” (33,100/mo) outranks “prime hydration” (9,900/mo) by 3.3×. A co-branded lunch kit carries more consumer vocabulary than the flagship’s own proper name.

The selected terms “prime drink” and “prime energy” total 43,400 average monthly US searches. Logan Paul and KSI draw a combined 411,000, a 9.5× founder-to-brand search ratio. [S1]

For a four-year-old CPG brand in mass distribution, the founders remain unusually tethered to the product in shoppers’ language.

Merciv consumer analysis. [S1] Search pairs. [R81] PRIME · official product collections.

PRIME: From queues to clearance

> **My six year old is asking basically daily to drink PRIME because all his friends do it.**

A PARENT ON REDDIT [R82]

5×

resale over suggested retail at PRIME's 2023 peak, when Woolworths capped sales at five per customer and UK schools called it "something of a cult among children." [R83, R86–R88]

Consumers do not question whether Logan Paul and KSI may sell a beverage. They question who it is being sold to, especially parents. The most-upvoted reply said the brand "heavily targets youths and as you can see, it works really well." [R82] Product quality alone cannot answer that challenge.

PRIME's value register underwent the sharpest reversal in the dataset. At its peak, the vocabulary was scarcity and status: queues, purchase caps, resale at up to five times SRP and fan-made stock-tracking maps. [R88, R86, R87] By 2025, the same brand was appearing in supermarket aisles on clearance. [R67] A brand founded with scarcity as its core value proposition has no position if retailers struggle to clear it.

Yet PRIME has the largest TikTok following (5.2M) of the four brands analyzed and the highest lifetime engagement per video: 371,837 likes, against 13,470 for SKIMS. Celebrity and influence can buy attention, but they cannot build a long-term business model on their own. [S1]

Risk is a defining register, generated by schools, regulators, courts, and health bodies, and consumers inherit it. UK schools issued warnings and bans from 2023, citing distraction, cost pressure on families, and a pupil falling ill. Multiple schools banned even empty bottles as water bottles. [R83, R84, R85]

[S1] Merciv · TikTok followers. [R67] Creator's Blueprint. [R82] Reddit. [R83–R85] School reporting. [R86–R88] Retail reporting.

PRIME: Regulators join the conversation

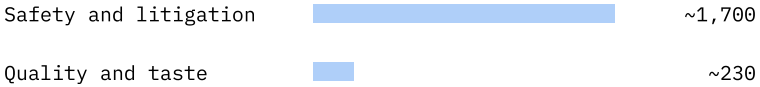
CASE 04 / PRIME

3 OF 3 · RISK & PRODUCT

Safety and legal searches outnumber quality and taste searches by more than six to one.

WHAT SHOPPERS SEARCH ABOUT PRIME

average monthly US searches, grouped query clusters



Query clusters from Merciv search analysis, US English, 12-month averages. Grouping is directional.

[S1] / MERCIV

FROM PEAK TO THE CLEARANCE AISLE

About $1.2B in 2023 sales, then 31p bottles

UK net profit fell 91.6%, and PRIME's share of UK sports drinks fell from 41.2% to 10.4% by 2024. [R67]

Regulators have moved on the category PRIME helped popularize with children. In 2023, Health Canada ordered PRIME Energy recalled: its 200mg of caffeine per can exceeded Canada's 180mg limit, and the cans lacked required bilingual labels. [R96]

In September 2025, the UK government opened a consultation on banning high-caffeine energy drink sales to under-16s. In July 2026 it confirmed the ban, which takes effect in England in April 2027. The government cites anxiety, poor sleep, and weaker school outcomes among the roughly 100,000 children who drink one every day. [R97]

The product has its own credibility gap. PRIME Hydration carries roughly 5mg of sodium per 8oz, against a benchmark of 100mg or more for sports rehydration. That leaves a repeat buyer little reason to come back. [R81]

PRIME traces the full arc of a brand run on attention: record launch demand, scarcity and resale, then school bans, regulators and clearance aisles, with no product advantage to fall back on.

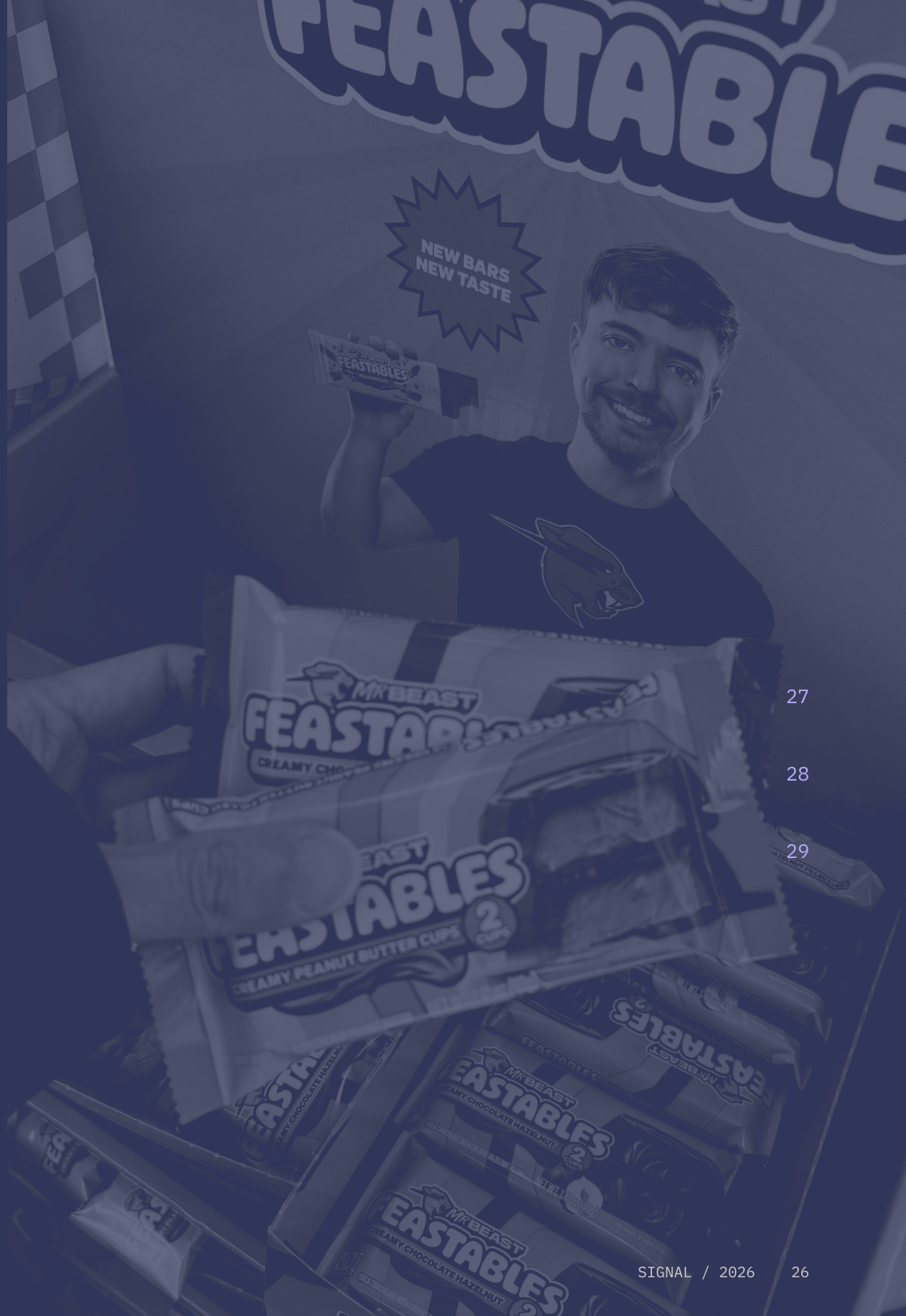
[S1] Merciv search clusters. [R81] PRIME · product information. [R83] BBC Newsround. [R86, R88] Retail reporting. [R96] CNN · Canada recall. [R97] GOV.UK · energy drinks ban.

What This Means For Brand Leaders

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Celebrity pays off on the trade side

Does celebrity recognition matter? Decisively yes, but mainly on the trade side. Capital, retail doors, press and investor attention all respond to a big name. On the consumer side, where trust, evaluation, and repeat purchase happen, celebrity influence falls away.

That matters if you partner with celebrities and mega-influencers now, or plan to. It also matters for everyone else. Many brands treat this sector as the gold standard, and our analysis shows that view is partly flawed. There are real lessons in how these brands approach marketing and creative strategy, but the fundamentals of good retail still hold.

Switching language, repeat-purchase signals, and abandonment triggers across reviews and social media all point the same way: product reliability makes or breaks a celebrity brand over time. Shoppers may covet a founder's aesthetic, yet that desire rarely carries through to retention and loyalty on its own.

MOST FOLLOWED, STEEPEST FALL

brand TikTok followers, global



PRIME has the largest following of the four case brands and the steepest collapse in sales. Verified public profiles, 27 Aug 2026.

[S1] / MERCIV

Reliability is the primary factor in retention.

Shapewear should last, so SKIMS' core category is bought rarely. The steady rotation of trend drops that fills the gap is what customers say "sacrifices quality."

Future Commerce / Merciv · search, social and review analysis across the Celebrity Brands study.

From evidence to action

WHERE DOES THE FOUNDER DO THE WORK?

	CAPITAL	RETAIL	AWARENESS	TRIAL	CONSIDER	PURCHASE	REPEAT	ADVOCACY
SKIMS	YES	YES	YES	YES	PARTIAL	PARTIAL	PARTIAL	PARTIAL
rhode	YES	YES	YES	YES	PARTIAL	YES	YES	YES
Feastables	YES	YES	YES	YES	NO	PARTIAL	PARTIAL	NO
PRIME	YES	YES	YES	PARTIAL	NO	NO	NO	NO

YES / PARTIAL / NO = Merciv's assessment of founder contribution.

NEXT STEPS / BRAND

Agree on the partnership model before the roadmap; compare benefits, decision rights, and financial exposure before committing product resources.

Check social headlines and loud detractors against product reviews; identify improvements and strengths to build on.

Prioritize retention: analyze repeat-purchase signals and independent sentiment alongside campaign reach to test lasting relevance.

Apply all six registers when assessing or developing any brand, including those without celebrity founders.

NEXT STEPS / PRODUCT

Match the partner to the product ecosystem; specify why, when, and where their involvement adds value.

Consider category experts, scientists, or authors who bring relevant product credibility.

Map real alternatives and behavioral changes through reviews and social conversation; use findings to refine positioning.

Treat reformulation as a trust event. Align product, brand, and marketing to explain changes clearly to current and loyal customers.

Map discovery through post-purchase; anticipate follow-up questions and design touchpoints for proactive support and responsive service.

NEXT STEPS / MARKETING

Show the founder's work in content, from product-roadmap decisions through marketing and sales.

Prioritize category authority in content and SEO with product details, reviews, and customer evidence, beyond founder buzz.

Test bold campaigns and cultural storytelling, with a plan for retention and loyalty after the attention spike.

Build a full-lifecycle strategy with product teams; use credible experts to explain quality and efficacy beyond personality.

Review six-register findings with brand strategy; use consumer behaviors, feelings, and experiences to choose messaging and campaign partners.

[S1] Merciv assessment, 27 Aug 2026. Future Commerce / Merciv · founder assessment and next steps.

Five inflections to watch

Our five inflections for the next two years show that the celebrity brand sector will only become more disrupted. Great products and great service experiences? Those are forever.

WHAT TO WATCH NEXT

SIGNAL	WHAT TO WATCH	HORIZON
When discovery moves to LLMs, category authority trumps a big name	Celebrity brands surface in AI answers only when you already name the product. Ask the category question, and they vanish. Watch who owns the category.	12–18 months
Demand contracts at the top of the market	Nine of the twelve largest celebrity brands lost search demand this year; eight of the nine smallest gained it. Watch whether the contraction spreads down-market in 2027.	12 months
Celebrity gets a value pressure test	Fame no longer earns a premium. Celebrity brands clear at the same 2.8×–3.8× rate as other brands, while sellers still mark at 5×–7×. The cachet of mainstream celebrities faces a test as more niche creators launch their own brands.	18–24 months
Authenticity becomes a compliance surface	The FTC's reviews rule covers specified undisclosed insider reviews and fake or false testimonials, including AI-generated reviews. [S5] Founder and insider endorsement practices will face greater scrutiny.	18–24 months
The next controversial chapter is synthetic celebrity	Meta may have shut down its licensed celebrity AI personas [R90], but FKA Twigs, Grimes, and Mark Tuan are among the celebs creating digital twins to keep control of their identities and encourage multiplayer participation. [R89]	24–36 months

Strength: 01 Strong · 02 Moderate · 03 Strong · 04 Moderate · 05 Watch only.

THE CONSTANT

Brands win when the founder is native to the category, and the product clears fundamentals. Brands break when they're built on pure hype attached to an undifferentiated product.

[S5] FTC Reviews Rule FAQ. [R89] Vogue Business · digital celebrities. [R90] The Verge · Meta chatbots.

Methodology

A SIGNAL report by Future Commerce, with research conducted using Merciv.

Using the Merciv platform, we have instant access to a trove of research, market data, and sentiment analysis to help us unpack what's fueling the celebrity-brand economy's growth. With these insights, you'll be able to understand the size, scope, and opportunity of this market, as well as how consumers' perceptions and behaviors with these brands may impact how your brand goes to market.

Search comparisons use 36 founder/brand query pairs from Google Ads Keyword Planner: United States, English, trailing twelve-month average volumes, pulled 27 August 2026. Ratios divide selected founder-query volume by selected brand-query volume. Generic names are disambiguated where stated. Rounded search buckets and query selection make fine rank differences directional. [S1]

TikTok follower comparisons use global counts from verified public profiles on 27 August 2026, with 19 usable founder/brand account pairs. Brand-to-founder ratios compare account sizes, not shared followers, audience transfer or purchases. The cross-brand lexicon table uses its separate 21 August 2026 snapshot for followers and lifetime likes per video. Recent-video views use the measure stated with their figure. [S1]

Review findings describe product- and persona-related language across 13 celebrity brands. Mentions of repeat purchase are expressions in reviews, not observed repeat-purchase transactions. Wholesale, survey and category comparisons use the sample, geography and period stated with each figure. The assessment lexicon groups consumer language into six registers: legitimacy, substitutability, value-for-money, efficacy and durability, access and hierarchy, and body/identity outcome.

RESEARCH AT A GLANCE

EVIDENCE	BASIS
Search	36 founder/brand query pairs · US, English
Social	19 usable TikTok pairs · global
Review language	13 celebrity brands · product and persona mentions
Snapshot	Workbook · 27 Aug 2026 Lexicon table · 21 Aug 2026

Research: Merciv. [S1] Assessment workbook. Methodology: this page. Appendix: page 31. External sources: pages 32–34.

The cross-brand lexicon map

The four case-study brands, scored on the signals behind the six registers. Search volumes are US English 12-month averages from Google Ads; TikTok figures are lifetime account totals from a 21 August 2026 snapshot.

THE CROSS-BRAND LEXICON MAP

SIGNAL / BASIS	SKIMS	RHODE	FEASTABLES	PRIME
Brand search (avg/mo)	1,500,000	550,000†	49,500	40,500 “prime drink”
Dominant secondary register	Value / substitution	Value / substitution	Product-truth / health	Risk
Substitution share of non-brand cluster	63% · “skims dupe” 2,900/mo	55% · “rhode dupe” 590/mo	n/a	n/a
Risk-cluster volume	none detected	20/mo · “rhode breakout”	110 · “is Feastables healthy”	~1,700
TikTok followers	2.9M	2.3M	4.5M	5.2M
TikTok likes per video (lifetime likes ÷ videos)	13,470	21,332	144,660	371,837
Founder named in brand queries	low	low	low	6.0% of product search
Operating model	Founder-operated + professional operator	Founder-operated → acquired [R73]	Founder-operated	Creator-fronted inside third-party operator [R67]

Merciv · Google Ads · US English · 12-month average to Jul 2026; TikTok · 21 Aug 2026.
† “rhode” includes Rhode Island searches; this head term is not a brand-only demand measure.

Merciv assessment lexicon. [R67] PRIME operating model. [R73] e.l.f. Beauty · Rhode acquisition completed.

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