



EMERGING TRENDS

Influencer & Celebrity Impact on Shopping Behavior



INFLUENCER IMPACT ABOUT THE REPORT

Manufacturers are looking to create new brands and find new ways to market their products. Retailers and investors are also seeking fast-growing [brands to drive their business](#), making influencer brands a central topic of discussion. However, visibility into these brands has been limited due to channel coverage and sample size.

NUMERATOR'S INFLUENCER & CELEBRITY IMPACT ON SHOPPING BEHAVIOR allows marketing leaders to learn more about why shoppers buy these brands and break down the benefits and risks of leveraging public figures into brand building and marketing.

Using Numerator's Total Commerce panel of over 150k panelists across both digital and physical collection methods, we analyzed purchasing and attitudinal behaviors among a selected list of 30 of the most visible influencer brands to date.



Methodology & Approach

For our analysis, Numerator identified 30 influencer brands– a blend of recently launched and historical brands. The brands could be privately owned, white-labeled or manufactured by a large CPG. Several criteria were considered:

- The brand originated with a celebrity or influencer.
- The brand must be found in retail stores (either in-store, online or third-party marketplace seller such as Amazon or Walmart).
- The brand must be part of one of three categories: food, beverages or beauty.
- The celebrity & influencer must have a stake within the brand and are part of the overall branding or story of the brand.

Please note that this list is not all inclusive of all influencer and celebrity brands in the marketplace and figures should be used as guidance over evaluating absolute performance.

Surveys were conducted in March 2024 and purchase panel data is looking at latest 12 months ending 1/31/2024 unless otherwise noted.



Three Stories for Leaders to Remember



RETAIL MINDSET

Most influencer brands operate by leaning on premium pricing and consumer niches, and most brands have yet to reach the levels of more mainstream counterparts. To hit it big, these brands need to learn to compete where a broader and more traditional retail approach is key.



THE QUALITY IMPERATIVE

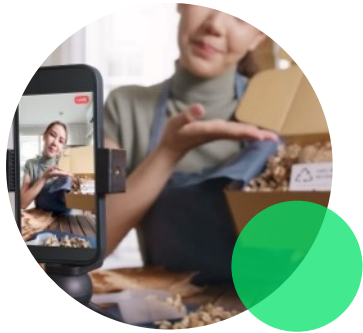
Although consumers are willing to pay a premium for influencer brands to stay trendy, retaining customers continues to be an opportunity. Product quality will be crucial. If influencer brands can deliver on quality, their growth could skyrocket given high customer lifetime values.



PR HIGHS AND LOW

Collaborating with an influencer or celebrity undoubtedly offers benefits. However, a brand cannot solely rely on a name. Consumer sentiment towards a public figure significantly influences how brands are perceived and the tradeoffs associated with having a respected celebrity endorse a brand.

Influencer brands bring many rewards and many risks.



STREAMLINED ACQUISITION STRATEGY

Influencers can have multi-million audience reach with strong engagement, making brand conversion much higher (and potentially more cost-effective) than traditional marketing.



ESTABLISHED BRANDING

Most public figures have a set style and audience. Brands looking to collaborate have a clear foundation to build from, allowing for faster route to market.



CANCEL CULTURE

Celebrities and influencers are consistently under the microscope. From old social media posts to seemingly innocuous comments, brands face a tumultuous battle.

Influencer brands reach younger consumers from Gen A to Gen Z.

SHOPPER PROFILE OF INFLUENCER PURCHASES

Latest 12 Months Ending 1/31/2024



THE YOUNGER IN-CROWD

44% Gen Z & Millennials | 138 Index

1 in 10 are Gen Z and over a third are Millennials.



KIDS THESE DAYS

45% Have Children | 158 Index

Nearly 1 in 4 (23%) have Gen Alpha children ages 6-12.



EARLY ADOPTERS

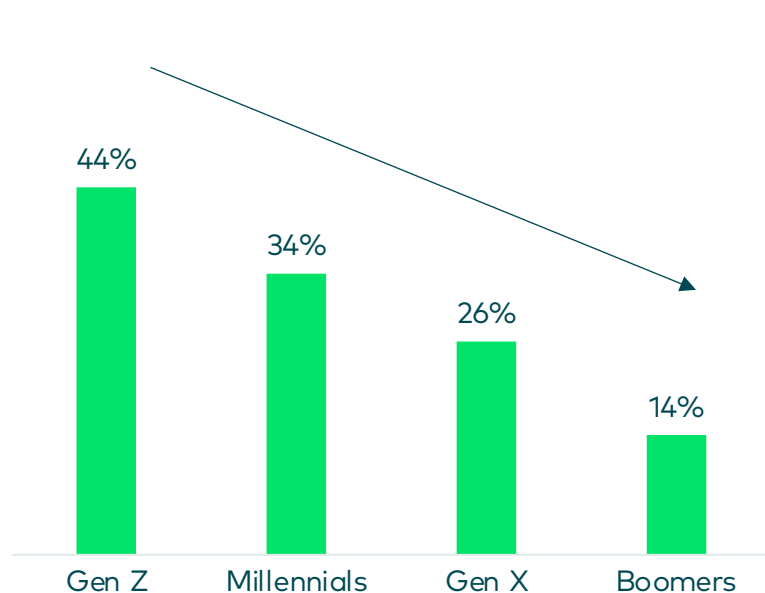
21% | 124 Index

1 in 5 are early adopters or innovators of shopping trends.

But as they expand distribution to a wider audience, marketing leaders will need to rework their strategies to gain awareness.

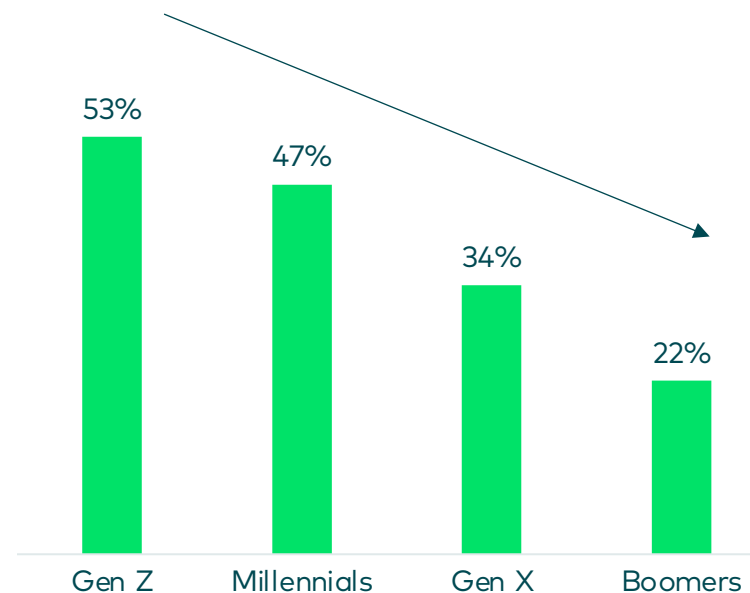
SOCIAL MEDIA AS FIRST SOURCE OF AWARENESS

Influencer Brands | % of Respondents



AWARE OF BRAND'S INFLUENCER AFFILIATION

Influencer Brands | % of Respondents



Source: Numerator | Influencer Brands N=3,145 | Among select 30 influencer brands, see appendix for full list.
 Q. Where did you first learn about [brand]?
 Q. Are you aware of [brand] having an affiliation or relationship with any public figure, influencer or celebrity?

Influencer brands also show psychographic differences between sectors, requiring nuance to align strategy to category.



EXPERIENTIAL ADVERTISING

Beauty influencer purchasers are **24% more likely vs total US** to learn about products through special events / pop-ups.

Case Study:

Fenty Beauty launched [an advertising campaign](#) last year on Roblox– a popular video game among Gen Z and younger. Buy rate of Fenty Beauty among households with children has tripled compared to total US at 6% year over year.



FAMILY COMES FIRST

Food influencer purchasers are **20% more likely vs total US** to put family needs first.

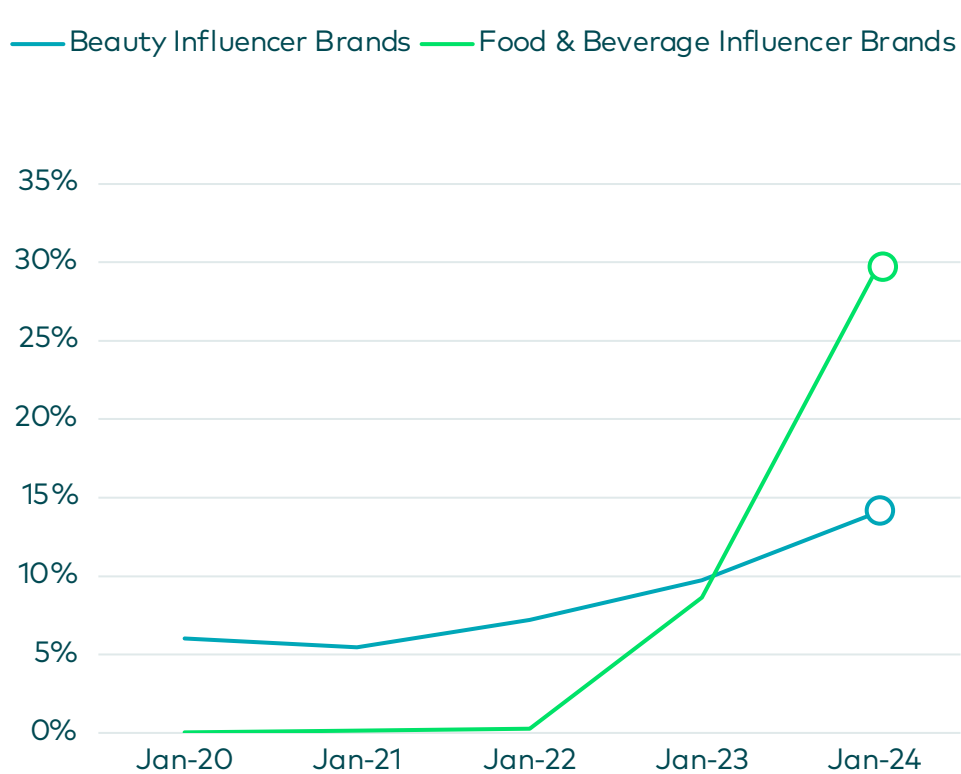
Case Study:

In October 2023, the D'Amelios, a popular TikTok family, launched snacking brand [Be Happy Snacks](#). Sold exclusively at Walmart, shoppers of the brand are 74% more likely to have children ages 13-17 vs total US.

Beauty influencer brands have built distinct communities, while Prime and Feastables largely drive success in food & beverage.

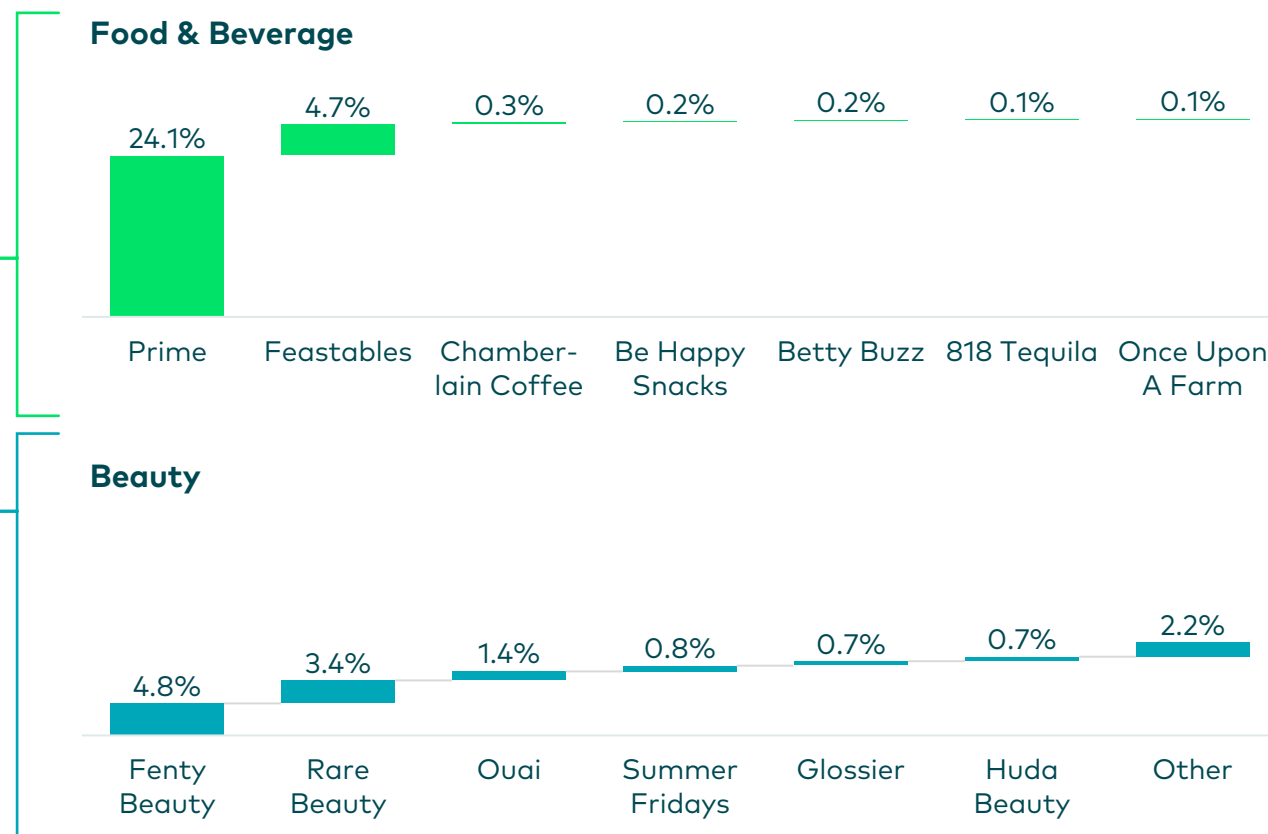
TOTAL US HOUSEHOLD PENETRATION

% Household Penetration | Rolling 12 Months by Year



INCREMENTAL PENETRATION BY PARENT BRAND

% Unduplicated Household Penetration | Latest 12 Months Ending 1/31/2024



Source: Numerator | Among select 30 influencer brands, see appendix for full list. | Not inclusive of all influencer brands, use directionally. Unduplicated household penetration calculated by looking at top penetrated brand and iterating through remaining brands for next most incremental group.

Food & beverage has taken an approach of broad appeal, while beauty brands have looked to stay with limited distribution.

TOP CHANNEL SHARE

% Dollar Share | Latest 12 Months Ending 1/31/2024

FOOD & BEVERAGE



28%

IN-STORE
MASS

BEAUTY



62%

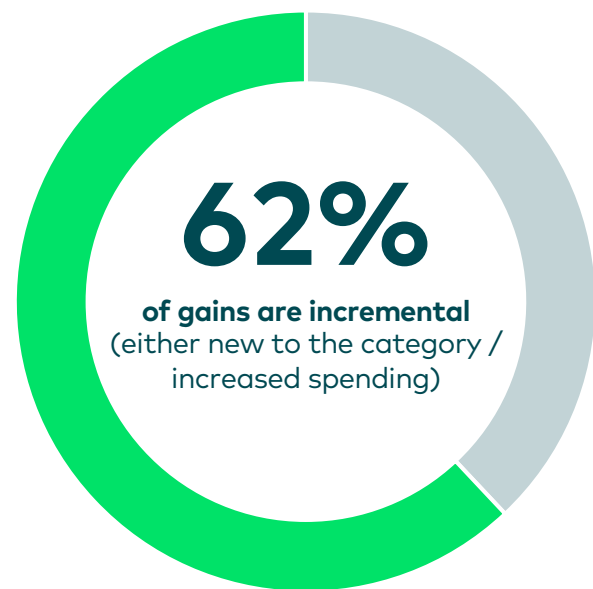
IN-STORE
SPECIALTY BEAUTY

HOUSEHOLD PENETRATION

Weighted Average | Latest 12 Months Ending 1/31/2024

| | FOOD & BEVERAGE | BEAUTY |
|------------------|-----------------|--------|
| Influencer Brand | 20.3% | 2.8% |
| All Brands | 26.8% | 15.5% |

Overall, influencer brands' gains are incremental; when they do steal share, they do so from large brands.



NEW INFLUENCER BRAND SHOPPERS BIGGEST SHARE DECLINE YEAR OVER YEAR

Latest 12 Months Ending 1/31/2024

| NON-SEASONAL CANDY | SPORTS & ENERGY DRINKS | SKINCARE | MAKEUP |
|--------------------|------------------------|-------------------|---------------|
| M&M'S | BANG | NEUTROGENA | MAYBELLINE |
| HERSHEY'S | GATORADE | CERAVE | L'OREAL PARIS |
| STARBURST | RED BULL | PRIVATE LABEL | KISS |
| BUTTERFINGER | ROCKSTAR | BATH & BODY WORKS | NYX |
| BABY RUTH | BODYARMOR | CETAPHIL | COVERGIRL |

In the case of beauty, new influencer brand shoppers premiumize the category. They start buying **other** premium brands, too.

NEW INFLUENCER BRAND SHOPPERS' BIGGEST SHARE INCREASE YEAR OVER YEAR

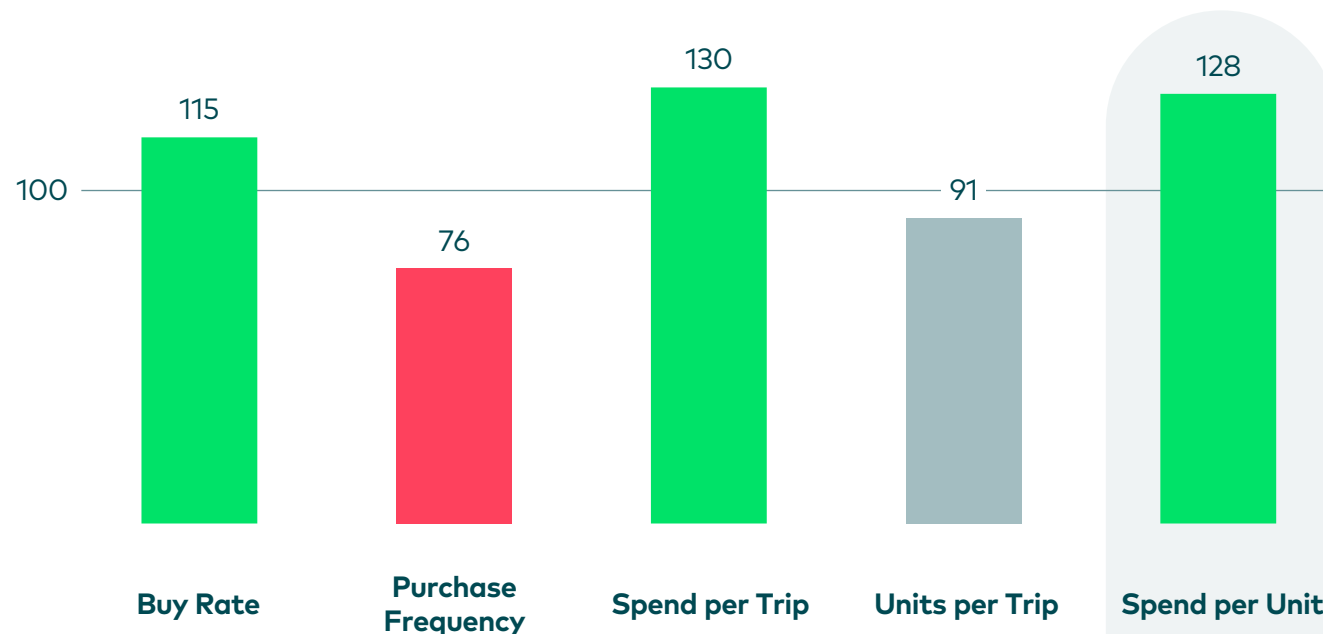
Excluding Influencer Brand | Latest 12 Months Ending 1/31/2024

■ Brand's Spend per Unit > 20% vs Category Average
 ■ Brand's Spend per Unit < 20% vs Category Average

| NON-SEASONAL CANDY | SPORTS & ENERGY DRINKS | SKINCARE | MAKEUP |
|--------------------|------------------------|------------------|-------------------|
| NERDS | CELSIUS | DRUNK ELEPHANT | CHARLOTTE TILBURY |
| SKITTLES | GHOST | GLOW RECIPE | ONE/SIZE |
| BAZOOKA | FAST TWITCH | SOL DE JANEIRO | SAIE |
| TWIX | CELLUCOR | LANEIGE | PATRICK TA |
| AIRHEADS | ALANI NU | DR. DENNIS GROSS | HOURGLASS |

While beauty influencer brands lack households & trips, they make up for it by commanding a much higher price point.

AVERAGE BEAUTY INFLUENCER BRAND INDEXED TO AVERAGE BEAUTY BRAND
 Weighted Average Across Brand | Latest 12 Months Ending 1/31/2024



| | Buy Rate | Purchase Frequency | Spend per Trip | Units per Trip | Spend per Unit |
|--------------------------|----------|--------------------|----------------|----------------|----------------|
| Influencer Brands | \$39 | 1.4 | \$29 | 1.3 | \$23 |
| All Brands | \$34 | 1.8 | \$22 | 1.4 | \$18 |

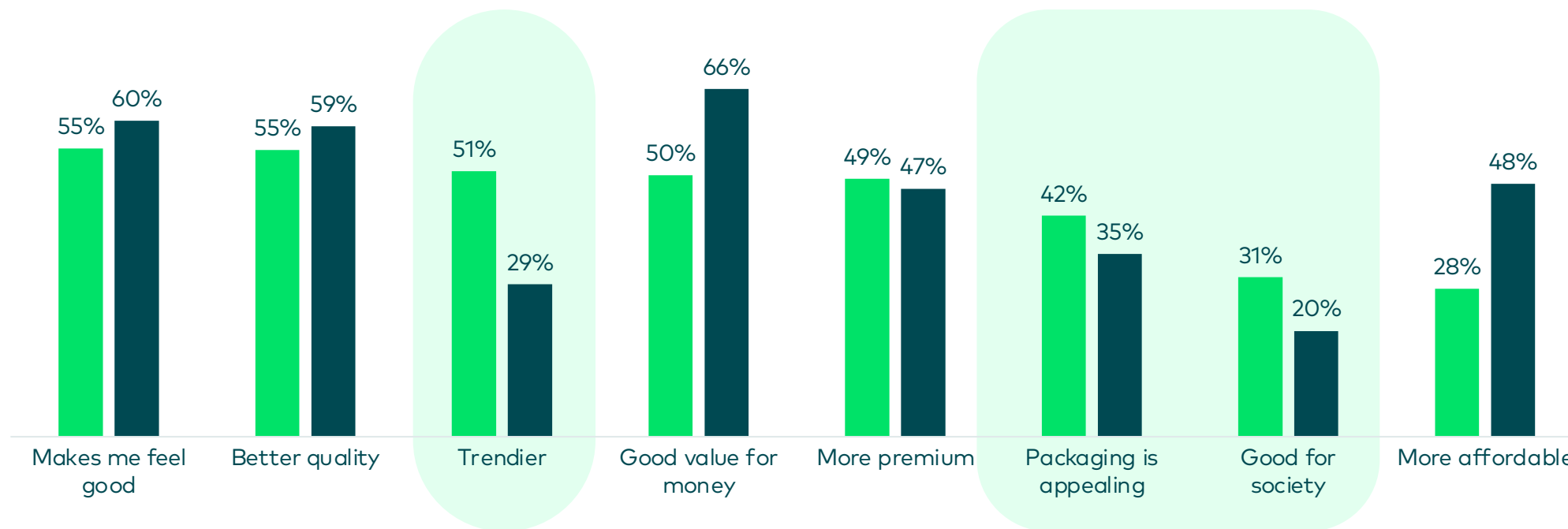
Source: Numerator | Among select 30 influencer brands, see appendix for full list.
 All brands defined as brands that play in the same departments as influencer brands.

Beauty influencer brands can command a higher price for its ability to stay on trend & social benefits.

BEAUTY BRAND PURCHASED COMPARED TO OTHER BRANDS

Purchase Verified Beauty Influencer Brand Shoppers | Top 2 Box

■ Influencer Brands ■ Top 10 Beauty Brands



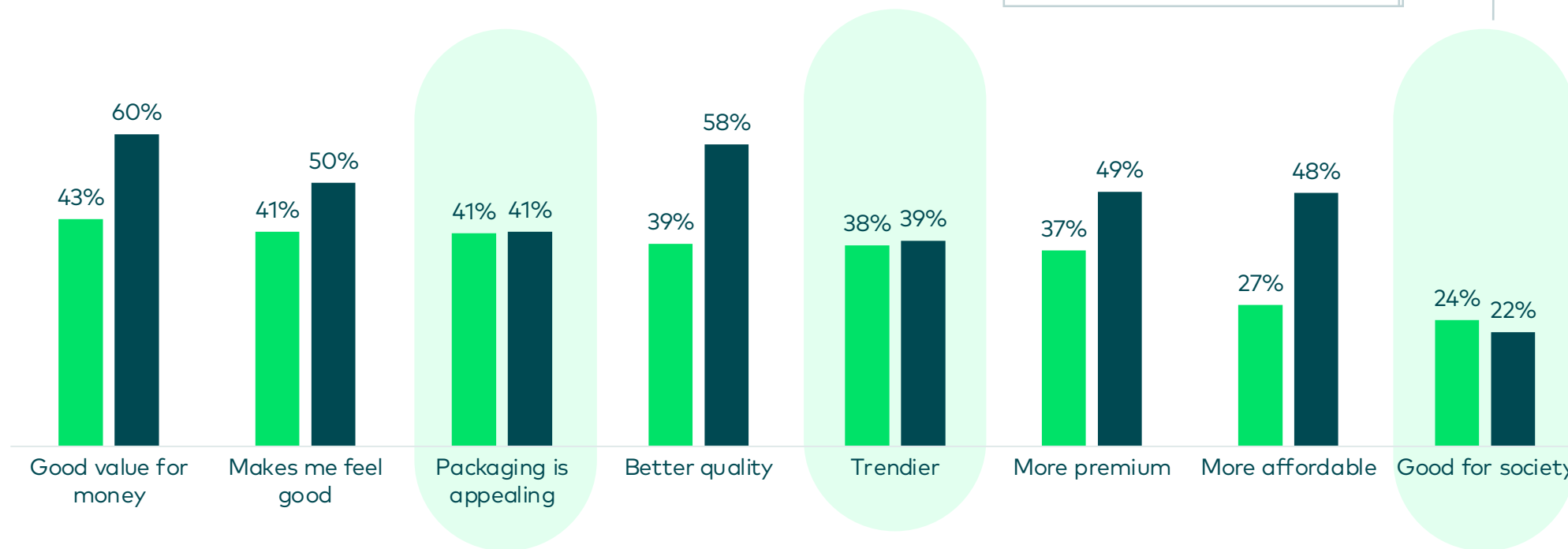
Source: Numerator | Beauty Influencer Brands N=1,022 | Top 10 Beauty Brands N=954 | Among select 30 influencer brands, see appendix for full list.
 Top 10 beauty brands defined by dollar sales in departments influencer brands play in.
 Q. How much do you agree with the following about [brand] in comparison to other similar brands?

Food & beverage influencer brands match competition through being trendy and providing social good, but they don't overperform.

FOOD & BEVERAGE BRAND PURCHASED COMPARED TO OTHER BRANDS

Purchase Verified Beauty Influencer Brand Shoppers | Top 2 Box

■ Influencer Brand ■ Top 10 Food & Beverage Brands



[818 Tequila](#), developed by Kendall Jenner, hosts a variety of ESG initiatives such as B-Corp certification, and gives back to local communities.

Source: Numerator | Food & Beverage Brands N=1,520 | Top 10 F&B Brands N=1,049 | Among select 30 influencer brands, see appendix for full list.
 Top 10 food & beverage brands defined by dollar sales in departments influencer brands play in.
 Q. How much do you agree with the following about [brand] in comparison to other similar brands?

However, trendiness doesn't always start with the face of the brand— only 1 in 3 shoppers know someone is behind the brand.



32%

of influencer brand shoppers knew the brand had an affiliation with a public figure.



1 in 5

influencer brand shoppers were able to properly identify the celebrity / influencer associated with the brand. (18%)

TOP 10 BRANDS WITH HIGHEST AWARENESS

% of Respondents Correctly Identifying



Rihanna | 59%



Lady Gaga | 46%



Kylie Jenner | 46%



Brad Mondo | 43%



Selena Gomez | 38%



Drew Barrymore | 36%



Tracee Eliss Ross | 35%



Kendall Jenner | 34%



Blake Lively | 27%



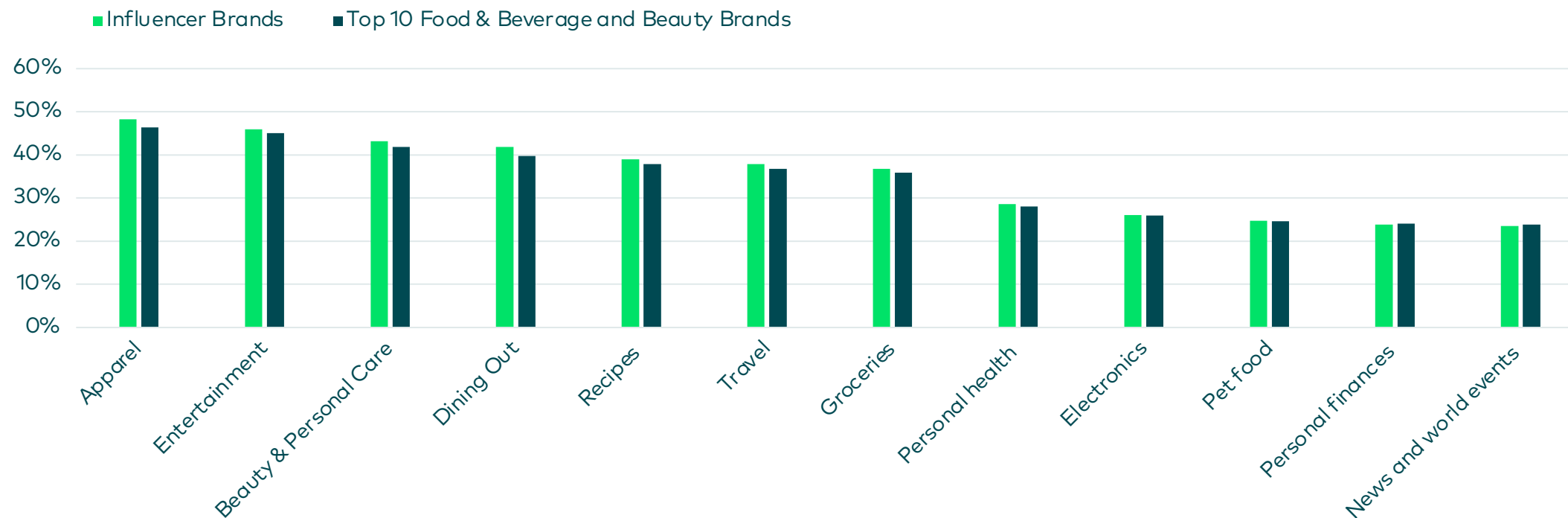
Millie Bobby Brown | 20%

Source: Numerator | Sample Varies by Brand | Top 10 List Limited to Survey Response > N=30
 Q. Are you aware of [brand] having an affiliation or relationship with any public figure, influencer or celebrity?
 Q. Which celebrity / influencer do you believe is associated with [brand]?

In fact, influencer brand shoppers do not lean on influencer recommendations any more than the average shopper.

TRUST IN INFLUENCER RECOMMENDATIONS OVER A BRAND WEBSITE OR ADVERTISEMENT

Purchase Verified Brand Shoppers



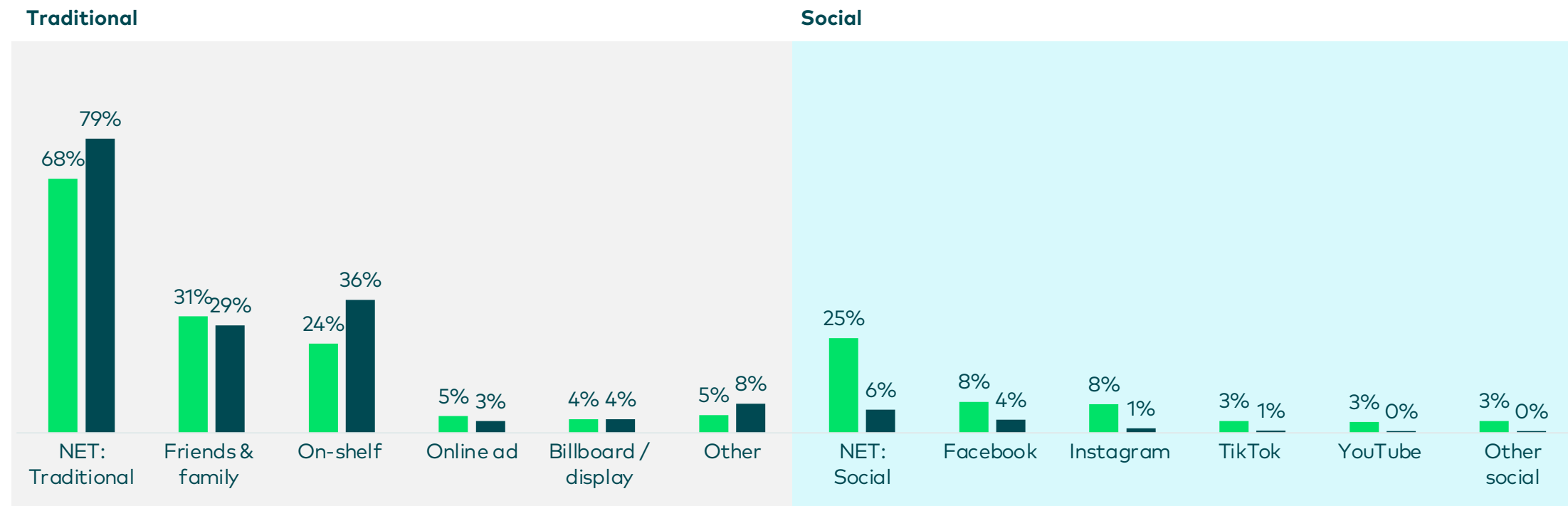
Source: Numerator | Influencer Brands N=3,145 | Top 10 Food & Bev and Beauty Brands N=2,099 | Among select 30 influencer brands, see appendix for full list. Top 10 food & bev and beauty brands defined by dollar sales in departments influencer brands play in.
 Q. Who would you trust more on the following topics?

Social media drives awareness for influencer brands, but IRL (in-real-life) buzz is also impactful.

FIRST SOURCE OF AWARENESS

Top 10 Responses | % of Respondents

■ Influencer Brands ■ Top 10 Brands within Food & Bev and Beauty

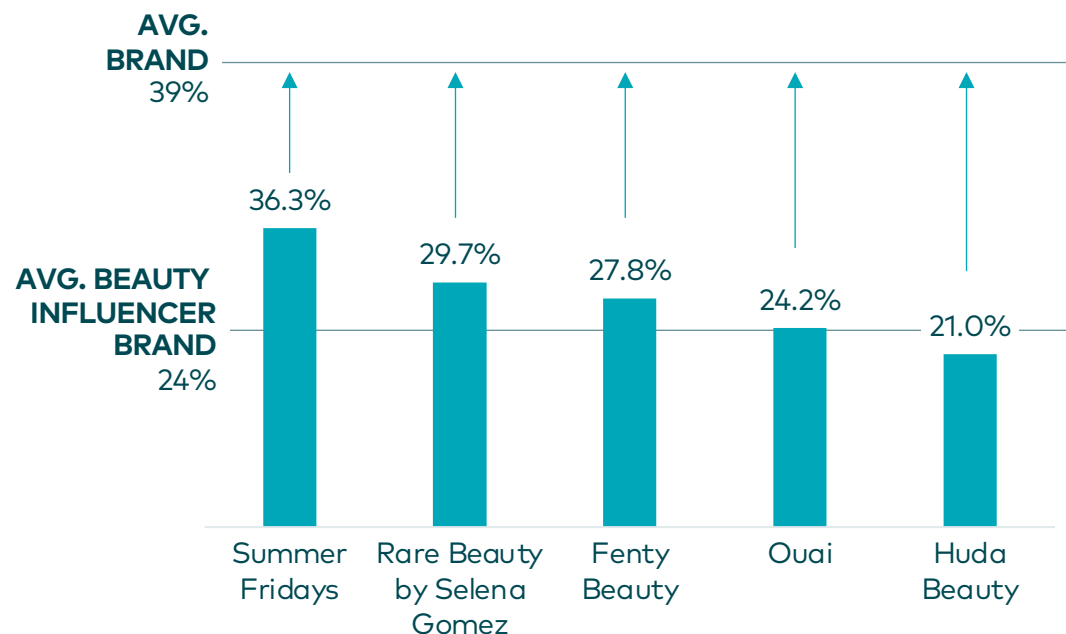


Source: Numerator | Influencer Brands N=3,145 | Top 10 Food & Bev and Beauty Brands N=2,099 | Among select 30 influencer brands, see appendix for full list.
 Top 10 food & bev and top 10 beauty brands defined by dollar sales in departments influencer brands play in.
 Q. Where did you first learn about [brand]?

Influencer brands still have room to grow as they require constant acquisition to mitigate lower repeat and satisfaction.

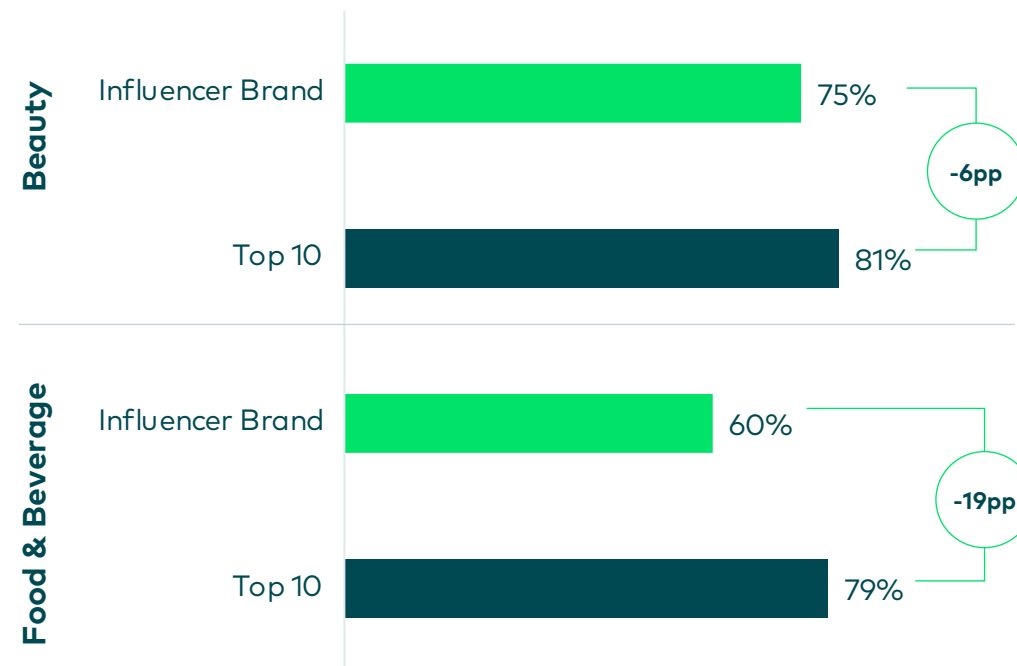
% OF 2022 BRAND PURCHASERS REPEATING IN 2023

Top 5 Repeating Beauty Influencer Brands
Latest 12 Months Ending 1/31/2024 vs YAG



LIKELIHOOD TO RECOMMEND

% Respondents | Selected 6-10

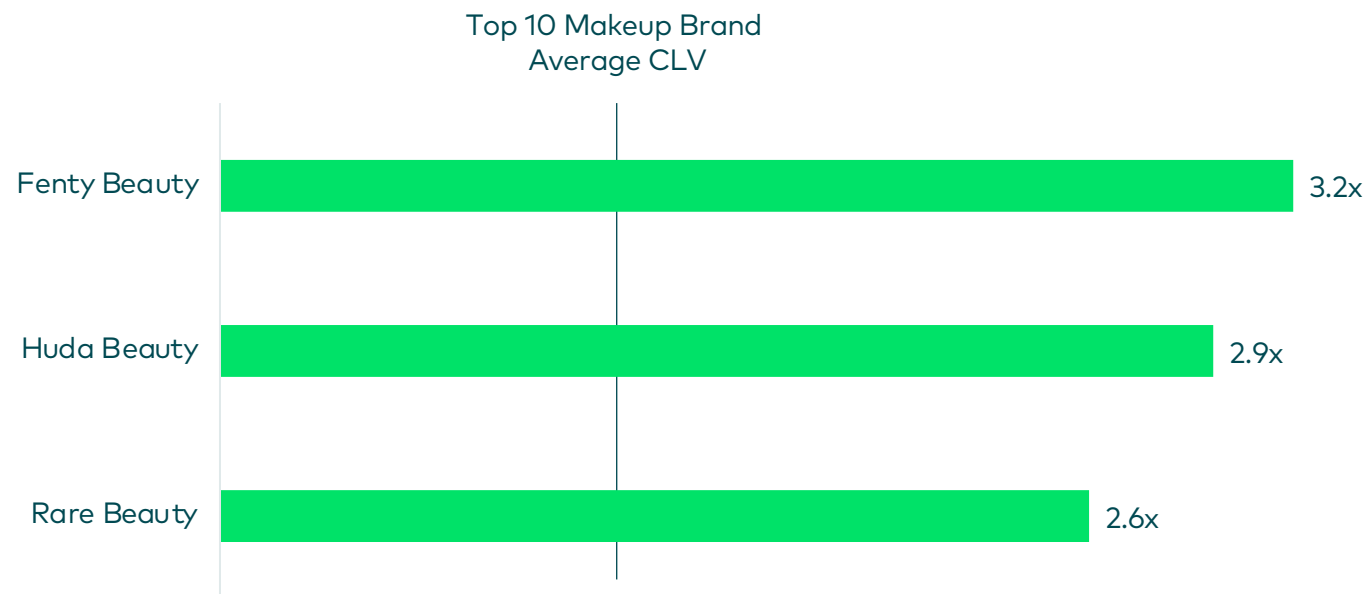


Source: Numerator | Repeaters defined as purchasing in Latest 52 Ending 1/31/2024 and year ago within the same timeframe. | Among select 30 influencer brands, see appendix for full list. Avg. brand defined as brands that play in the same departments as influencer brands.

By improving quality to reduce churn, influencer brands can achieve rapid growth, leveraging their high lifetime values.

2-YEAR RETAINED CUSTOMER LIFETIME VALUE INDEXED TO TOP 10 MAKEUP BRANDS

Of households retained for two years | Purchasers in L52W Ending 2/25/2022

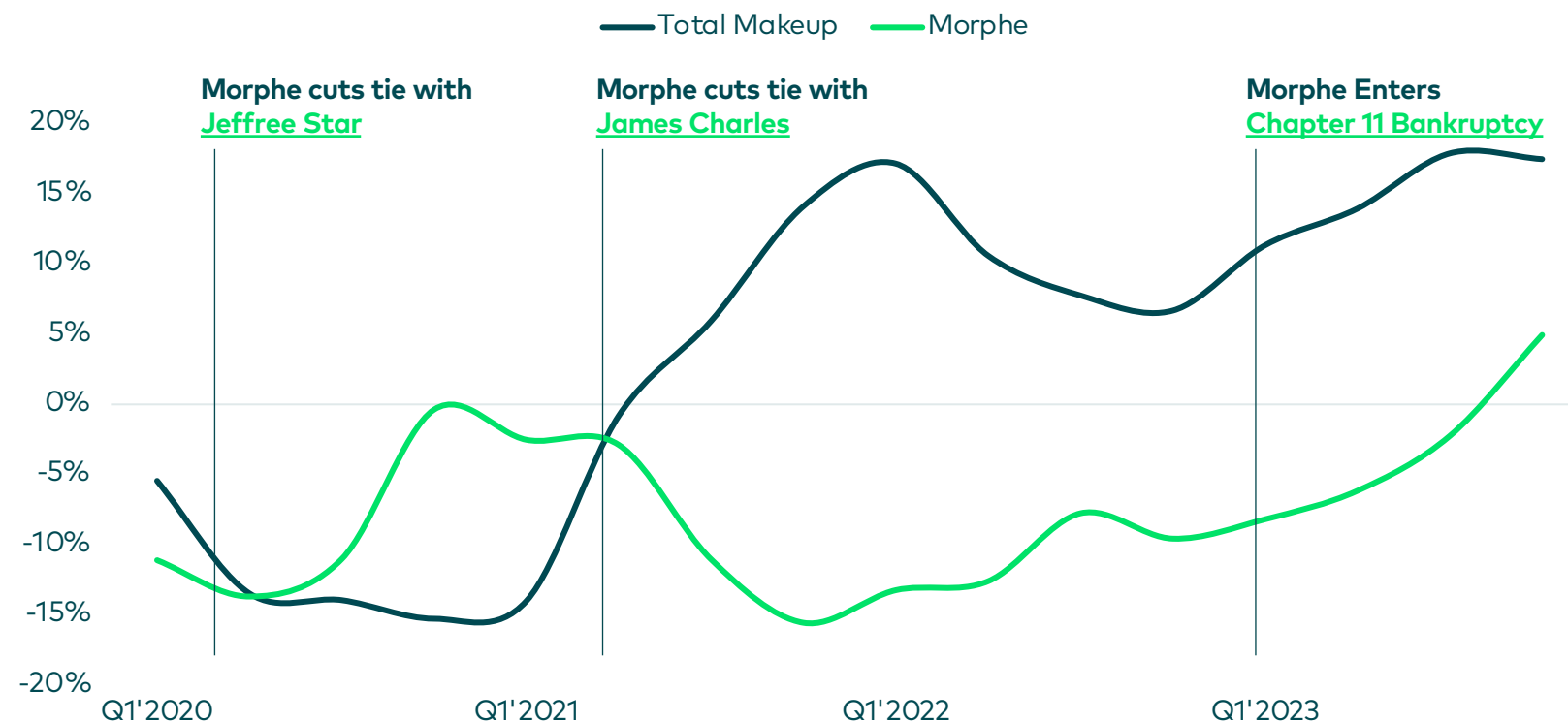


Source: Numerator | CLV is time aligned based on shoppers who made their first purchase in the L52W ending 2/25/2022 and then continue to buy the brand in year 1 and year 2. Top 10 Makeup Brands is a weighted average based on sales. | Looking at brands with with more than 3 years of retail coverage.

As influencer brands hinge on the equity of a public figure, choosing the right person is paramount.

MORPHE CASE STUDY: BUY RATE TRENDS

Rolling 52 Weeks by Quarter vs YAG Ending Q4'2023



MORPHE

Morphe is a Los Angeles-based cosmetics and beauty manufacturer started up in 2008.

The brand is most known for bringing to distribution beauty projects in partnership with social media influencers.

During the COVID-19 pandemic, Morphe faced several downturns due to social media influencers facing negative press and were unable to recover at the same rate as the rest of the market.

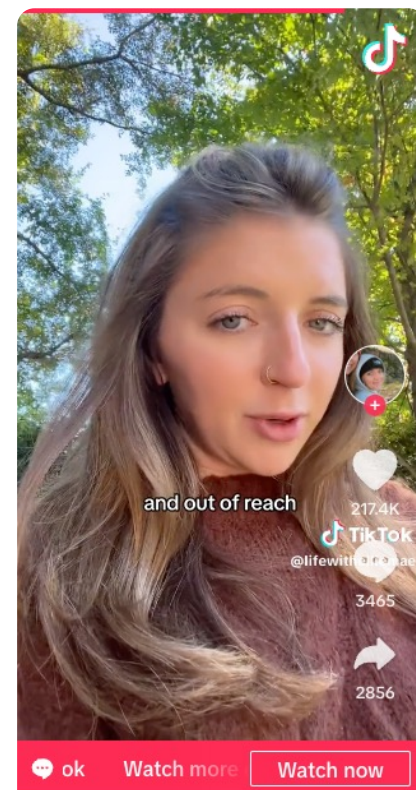
And influencers have been hit with **deinfluencing** – a counterculture reaction to overconsumption.

What is deinfluencing?

Instead of telling followers to buy a product, deinfluencing involves people telling their followers not to buy a product. This deinfluencing trend has recently exploded in popularity.

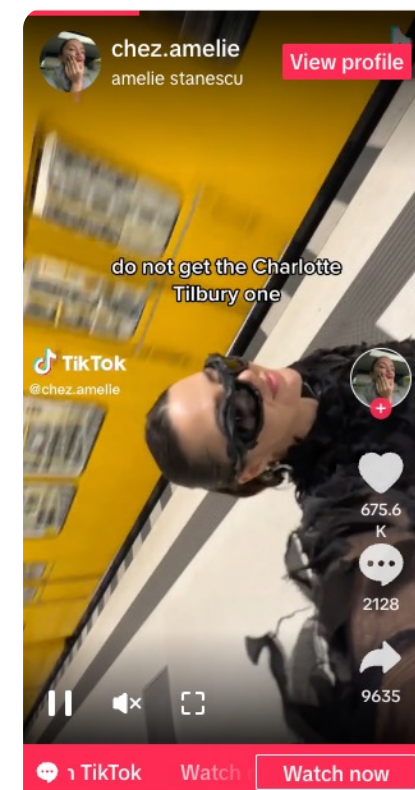
The reasons for deinfluencing vary, but typically a content creator wants to urge people not to purchase a product or service that may:

- Cost far more than it should
- Consists of shoddy craftsmanship or poor quality
- Cause environmental harm or excess waste
- Cause physical or mental harm
- Be ethically questionable



@elliewfrazier
sorry if this is harsh im just very passionate about this hahahaha #overcons ...See more
🎵 original sound - ellie ❤️

[WATCH](#)



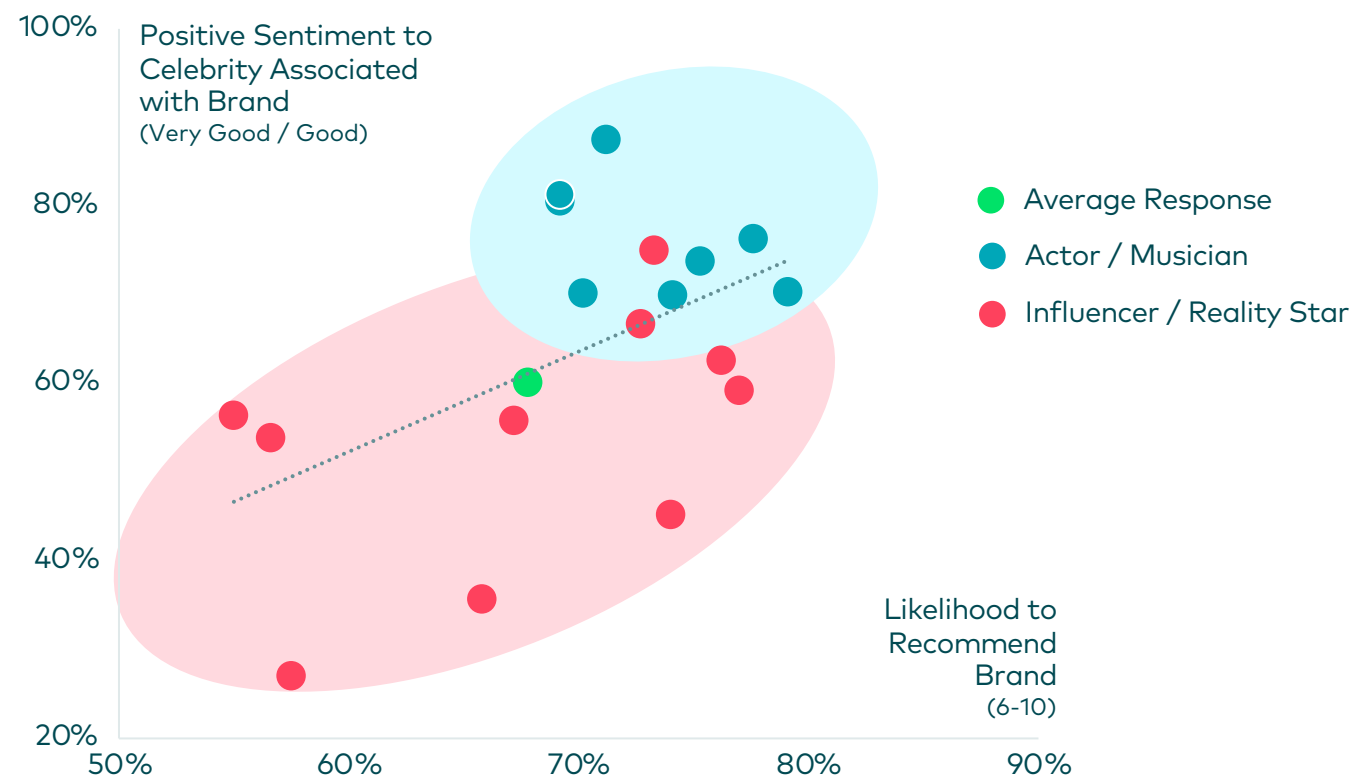
@chez.amelie
The deinfluencer #deinfluencing #deinfluencinggang #deinfluencing ...See more
🎵 original sound - Estef

[WATCH](#)

A-list public figures perform better. Sentiment of public figures shows a positive relationship with product recommendations.

CELEBRITY SENTIMENT VS RECOMMENDATION

% of Respondents | Axis adjusted for visibility

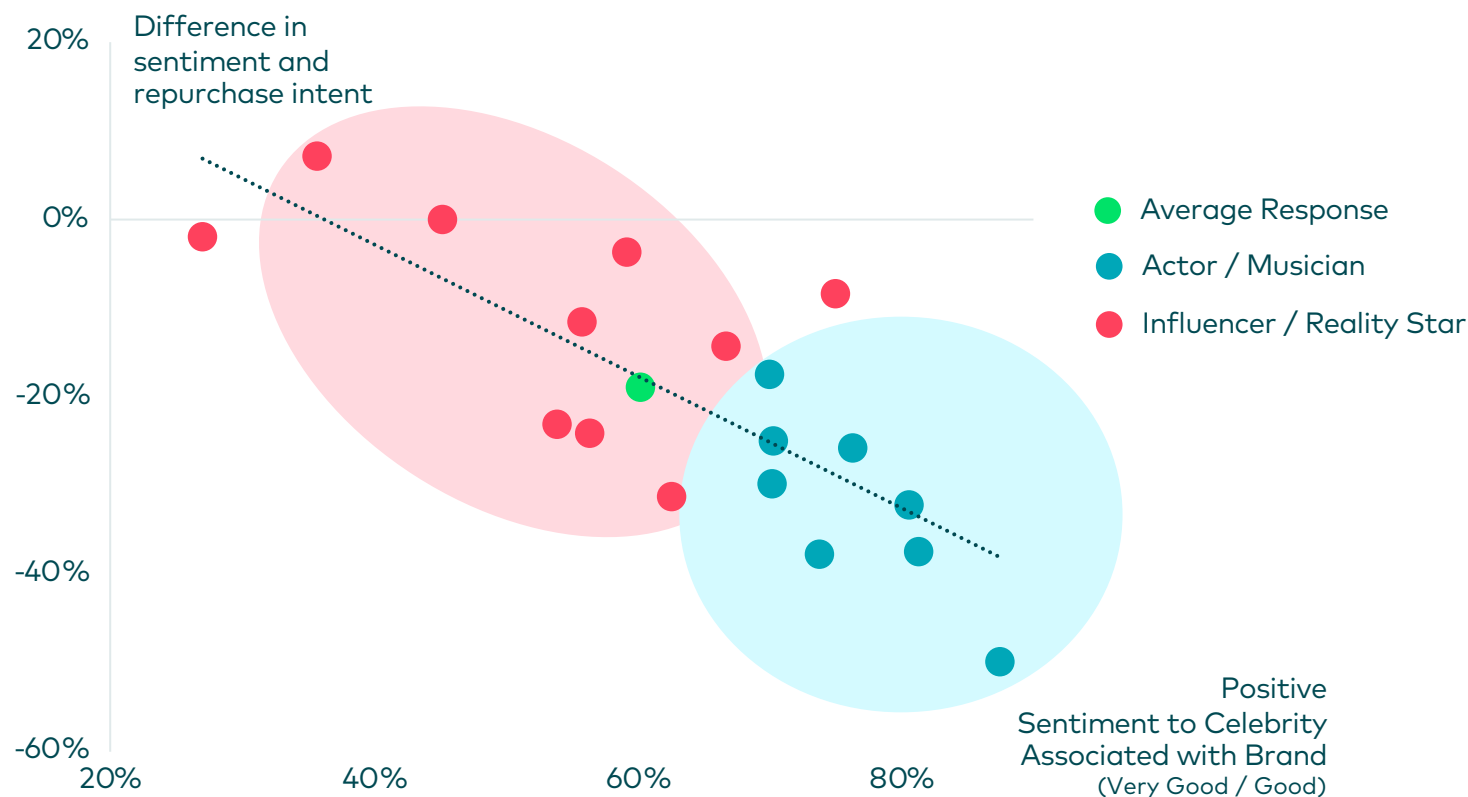


Source: Numerator | Sample Varies by Brand | Limited to brands with survey response > N=30
 Q. On a scale of 0-10, how likely would you recommend [brand] to a friend or family member?
 Q. What is your current perception of [public figure]?

However, mitigating PR risk is crucial – the more respected the figure, the bigger the fall if negative news emerges.

SCANDAL IMPACT VS CELEBRITY PERCEPTION

% of Respondents | Axis adjusted for visibility



Source: Numerator | Sample Varies by Brand | Limited to brands with survey response > N=30

Q. If you found out that [public figure] had negative news surrounding them or a recent scandal regardless of if it was true, how likely would you be to repurchase [brand]?

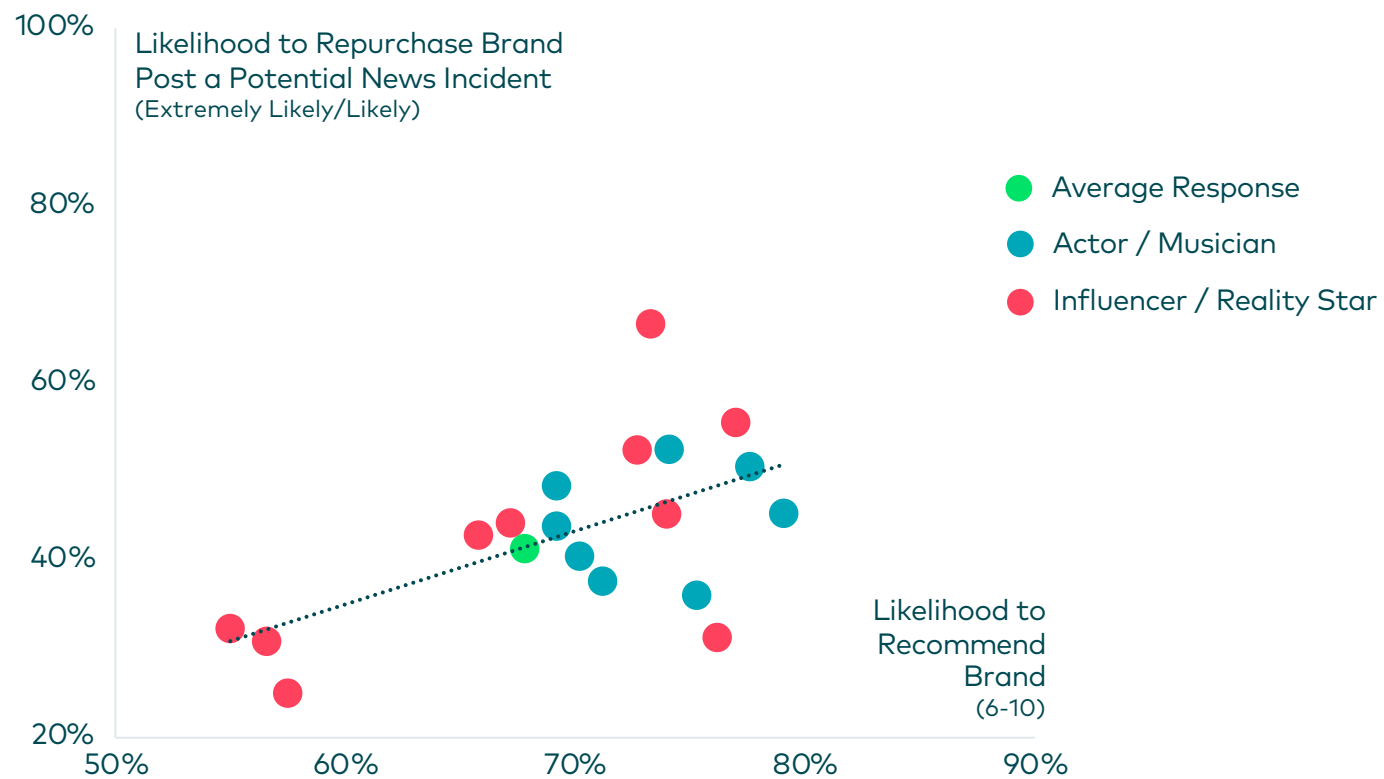
Q. What is your current perception of [public figure]?

Y-Axis : Difference Between Celebrity Sentiment (assumed baseline repurchase intent) and Repurchase Rate Post Potential News Incident

The best way to insulate your brand from a PR crisis is simple: having a quality product.

SCANDAL RESILIENCE VS RECOMMENDATION

% of Respondents | Axis adjusted for visibility



Source: Numerator | Sample Varies by Brand | Limited to brands with survey response > N=30
 Q. On a scale of 0-10, how likely would you recommend [brand] to a friend or family member?
 Q. If you found out that [public figure] had negative news surrounding them or a recent scandal regardless of if it was true, how likely would you be to repurchase [brand]?

Inspiration for Brands & Retailers.



GROW WITH YOUR CONSUMER

As influencer brands look to take up more space on retail shelves, these emerging brands will need to develop a new muscle to market and understand their *shopper* (i.e. not always the consumer) where mainstream brands have the edge.

Influencer brands will need to focus on leveraging traditional marketing campaigns and [trade promotions](#).

One example is [Chamberlain Coffee](#) where they are investing in building trade promotions and sampling to appeal to older shoppers.



QUALITY WINS

A lesson for all brands: even the most revered names in entertainment cannot carry the weight of a brand on their own. While influencer brands bring cultural excitement and incite purchasing, consumers will not repeat if product quality lags.

However, the lifetime value of the customers they do retain is strong. For influencer brands to thrive and accelerate growth, emphasizing quality is paramount. Feastables is doing just that with [rebranded packaging and formulation](#).



DO YOUR RESEARCH

While partnerships with public figures can provide a vehicle for increased awareness, our insights suggest that sentiment toward that public figure has a relation to shoppers' perception (and product recommendation) toward a product.

However, the more revered a figure is, the harder the drop in repurchase intent should negative news emerge. When that happens, some brands are unable to dig themselves out.

Marketing leaders will need to decide if the pros outweigh the cons when choosing a potentially more [divisive public figure](#).

How Numerator can help you find growth.



BRAND INTERACTION

Understand how your brand interacts with influencer brands by leveraging cross purchasing and source of volume in Numerator Insights.

See whether they steal share or if the purchase is incremental in the store to determine risk.

[LEARN HOW](#)



KNOW HOW MUCH TO INVEST

Determine what level of investment you should put into either acquiring or developing a brand through influencer marketing by knowing your customer lifetime value.

By identifying the amount, you can determine the cost you can put in for sustainable and profitable growth.

[LEARN HOW](#)



CONCEPT TESTING

If you're looking to incorporate any partnerships with a public figure or sports team, getting consumer sentiment on that influencer or celebrity is critical in determining risk.

Survey purchase verified brand buyers and share concepts of the partnership through our purchase-verified test panel.

[LEARN HOW](#)



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Appendix

Brand Scope Analysis

BEAUTY

| Brand | Influencer / Celebrity |
|------------------------|------------------------|
| About Face Beauty | Halsey |
| Cay Skin | Winnie Harlow |
| Fenty Beauty | Rihanna |
| Florence By Mills | Millie Bobby Brown |
| Flower Beauty | Drew Barrymore |
| Glossier | Emily Weiss |
| Haus Labs | Lady Gaga |
| Honest Beauty | Jessica Alba |
| HUDA Beauty | Huda Kattan |
| Jeffree Star Cosmetics | Jeffree Star |
| KORA Organics | Miranda Kerr |
| Kylie Cosmetics | Kylie Jenner |
| Kylie Skin | Kylie Jenner |
| Ouai | Jen Atkin |
| Pattern Beauty | Tracee Eli Ross |
| Rare | Selena Gomez |
| REM Beauty | Ariana Grande |
| Sienna Naturals | Issa Rae & Hanna Diop |
| Summer Fridays | Hewitt & Ireland |
| XMONDO | Brad Mondo |

FOOD & BEVERAGE

| Brand | Influencer / Celebrity |
|-------------------------|------------------------|
| 818 Tequila | Kendall Jenner |
| Be Happy Snacks | D'Amelio Family |
| Betty Buzz | Blake Lively |
| Chamberlain Coffee | Emma Chamberlain |
| De Soi | Katy Perry |
| Feastables | Mr Beast |
| Kin Euphorics | Bella Hadid |
| Once Upon a Farm | Jennifer Garner |
| Prime | Logan Paul |
| Tingley Ted's Hot Sauce | Ed Sheeran |