

Presented by

RIVAL

BRANDS TO WATCH

2026 REPORT

THE CHALLENGER BRANDS BUILDING THE FUTURE

CONTENTS

| | |
|---------------------|-----------|
| SUMMARY | 3 |
| FRAMER | 4 |
| AIRALO | 7 |
| MANORS GOLF | 8 |
| SURI | 11 |
| HERE WE FLO | 12 |
| NOBLE MOBILE | 15 |
| NEKO HEALTH | 16 |
| BUZZBALLZ | 19 |
| WEBTOON | 20 |
| YOCO | 23 |

SUMMARY

Every year, the Rival 50 tracks the brands reshaping categories through challenger behaviour. Not the loudest brands. Not the best-funded brands. But the brands making deliberate decisions to reshape how their categories are supposed to work. This report is an extension of The Rival 50. It highlights the brands we believe will matter most in 2026 — the ones already showing early signs of future category leadership, and the ones marketing teams should study now, before their strategies become category convention.

Some of the brands in this report are already operating at global scale, whilst others are still building toward it. But scale is not what makes a challenger.

As our Chief Strategy Officer, Lance Koenig, puts it, being a challenger is a decision, not a position.

What matters is whether a brand is actively choosing to reject the default rules of its category and structurally change how value is created inside it. For every brand featured, the starting point is not whether they are interesting, but whether they are changing how growth happens inside their category. That means starting with the fundamentals: growth signals, adoption curves, search demand, and competitive displacement patterns. From there, the focus narrows to the single most important strategic decision the brand has made — the decision to deviate from a specific category norm. Challenger brands do not try to be different in general. They make one hard decision and build everything around it.

Much like our Rival 50 report, this perspective is not grounded in observation alone, but is validated by data. Rival Curo, our proprietary share of search and category intelligence platform, brings together search, LLM, social, and media data sources to build a comprehensive picture of the behaviours and preferences driving demand and disruption within categories. Curo allows us to move beyond surface-level trend tracking and understand where demand is structurally shifting, which brands are beginning to own new territory, and where competitive displacement is already underway.

Some brands have been explored in more depth than others. This reflects where we currently have the strongest validated signals across culture, behaviour, and data. In areas where brands are showing strong directional momentum but less fully matured signal depth, we have chosen to stay disciplined rather than over-interpret. This report is not a ranking or scoring of brands. The order in which brands appear is not indicative of a Top 10, but rather a set of brands we believe are important to watch this year.

The Rival 50 is about identifying those brands early, and this supplementary report highlights which brands we're seeing as early entrants and potential winners for 2026.



THE CONTEXT

The no-code and web experience platform category has matured into a technically capable but culturally flattened space. A space where most platforms promise faster launch cycles and fewer developer dependencies. As AI accelerates production, output is increasingly optimized for efficiency and scale, often at the expense of identity.

Framer operates inside a competitive set that includes Webflow, Wix, Squarespace, and a growing layer of AI-assisted builders, all shaped by the same category logic of removing friction and shipping faster. As design-led platforms capture more than a third of the market, the shift underway is cultural as much as technical. The tension is no longer whether teams can build websites, but whether they can still build websites that feel distinct.

THE STRATEGY

Instead of accepting the designer-to-developer divide as a structural reality, Framer reframes it as legacy overhead and makes that reframing visible through its marketing.

Where the category optimizes for speed and workflow efficiency, Framer positions web creation as a continuous act of authorship. The marketing turns that shift into a cultural signal about how modern web building should feel: direct, controlled, and creatively owned. Rather than competing as a faster builder, Framer works to redefine what building for the web means.

DIFFERENTIATION

Framer differentiates through marketing that turns design output into status infrastructure. The brand has built an ecosystem that elevates work created on the platform into a marker of creative authority.

The Framer Awards anchor that system by celebrating sites built entirely inside the platform and positioning designer-built work as aspirational. As a community-voted ceremony, the Awards function as portfolio currency, industry recognition, and professional signaling. Supported by an active official community and a fast-growing creator base across channels like r/Framer, the ecosystem reinforces Framer as a creative network rather than a standalone tool. Where competitors market capability, Framer markets creative legitimacy.

RELEVANCE

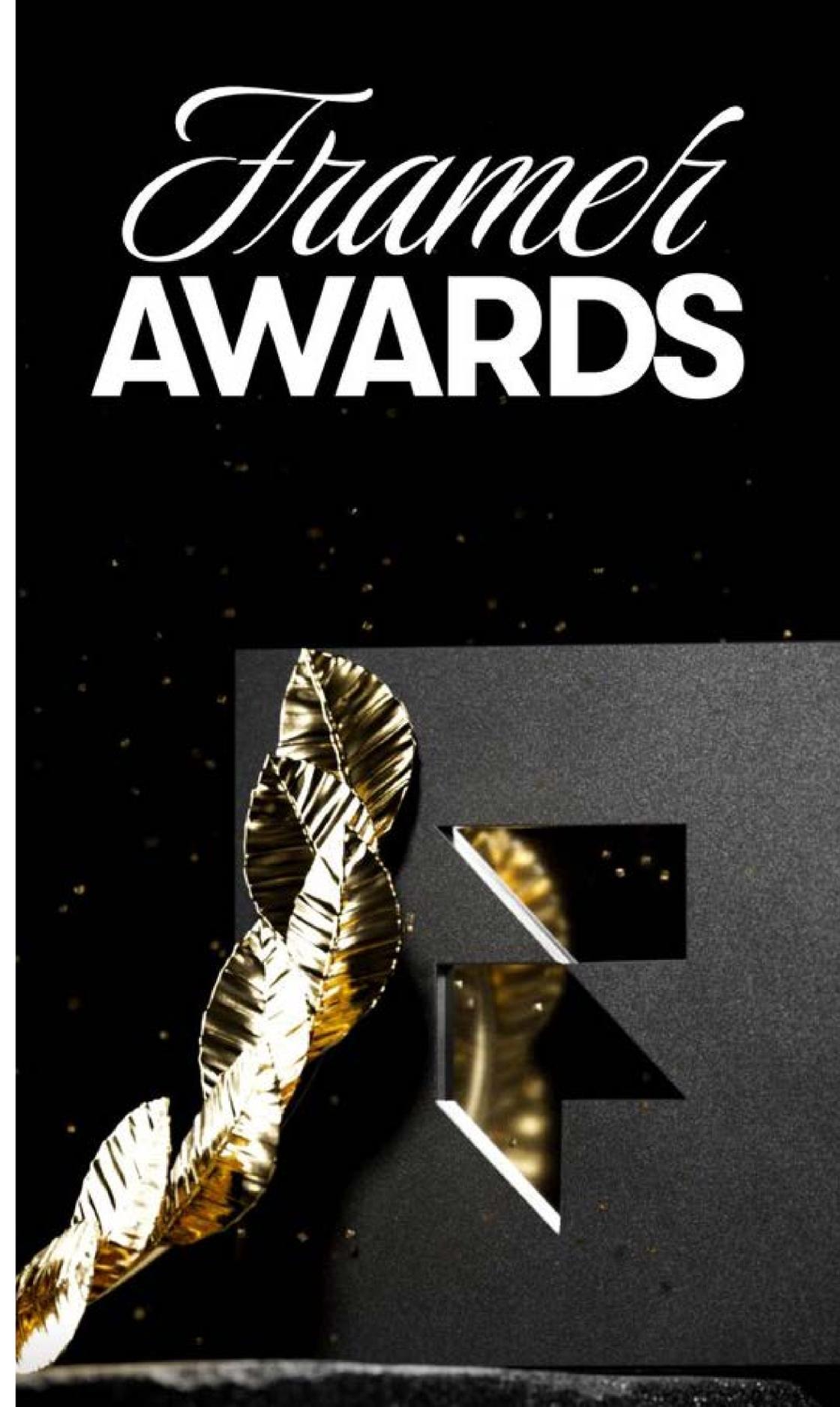
Framer’s relevance comes from aligning its marketing with how modern digital work actually operates, where tools are judged not only by productivity but by whether they support real career and business outcomes. As creative careers move toward independent studios, creator-led businesses, and product builders, the platforms that matter most are those that sit inside how people learn, collaborate, and earn.

Framer reinforces this through a highly visible community ecosystem and product launches that happen in real time. At events such as its Spring release cycle, features launch the same day they are announced, aligning brand behavior with builder expectations around speed and transparency. The platform is positioned not as a tool to ship faster, but as infrastructure that supports modern creative careers.

TALKABILITY

Framer drives talkability by using marketing to openly critique category behaviors competitors avoid confronting, while building campaigns that make creator success visible and culturally shareable.

The \$1M Framer Challenge turned product adoption into public economic storytelling through a live revenue leaderboard that showed creators building real businesses on the platform. Combined with culturally sharp campaigns such as the “Free Trial” van activation, which used satire to expose the hidden developer costs behind “free” website builders, and the “Credibility” campaign, which mocked sterile SaaS marketing tropes, this creates an ongoing conversation inside startup and design communities. Framer’s talkability is driven by conviction, with marketing that consistently signals the category needs to evolve.



COMMERCIAL IMPACT

Framer’s commercial performance signals growing market confidence in design-led infrastructure as a core part of the modern digital stack. In 2025, the company raised \$100 million at a \$2 billion valuation while reaching roughly \$50 million in ARR, doubling year-over-year. This combination of venture confidence and recurring revenue momentum suggests Framer is moving beyond early adoption into sustained commercial scale. Adoption across high-growth startups and a reported ~40% usage rate across recent Y Combinator cohorts reinforces that Framer is not just winning on usability, but on credibility among the fastest-moving companies building the next generation of the web.

Curo category intelligence data suggests this growth is being driven by real market demand rather than marketing noise. Framer shows +133.5% share of search demand growth while legacy platforms like WordPress decline. In practice, this indicates Framer is capturing high-intent platform selection demand, which typically converts more efficiently and compounds over time. The commercial signal is not just growth, but category migration toward design-native, marketing-controlled web infrastructure.

RIVAL’S TAKEAWAYS

1. CHALLENGE YOUR CATEGORY THROUGH MARKETING, NOT JUST POSITIONING.

Build campaigns that publicly expose industry sameness and make your point of view unmistakable in market.

2. TURN PRODUCT INNOVATION INTO MARKETING NARRATIVE.

Design campaigns that clearly demonstrate how your product removes constraints competitors still expect customers to accept.

3. WIN OVER THE MOST CREDIBILITY-SENSITIVE AUDIENCE FIRST.

Build marketing that proves your value to the toughest critics, then use their endorsement as the signal that unlocks mainstream trust and scale.

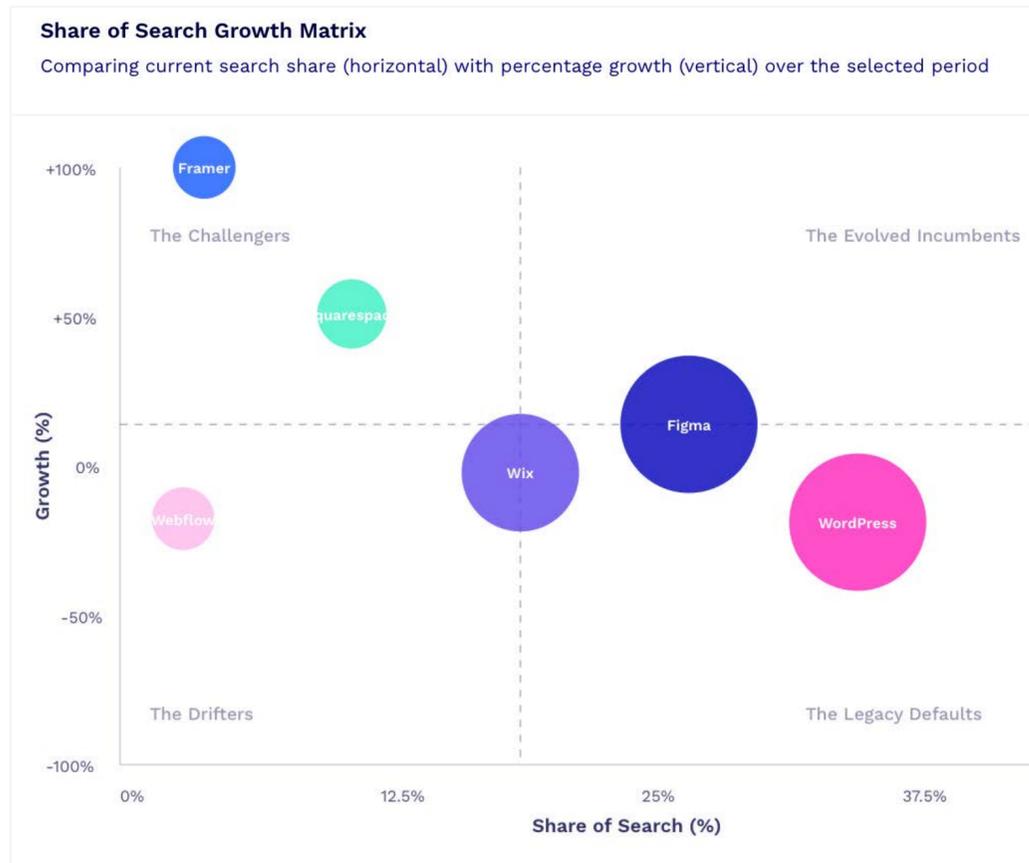


Figure One: Share of Search Growth Matrix for Framer (Source: Curo by Rival).



For years, mobile connectivity has operated on the assumption that crossing a border should break your service. Roaming fees, SIM swaps, and locked plans were not accidents. They were the business model. Airalo steps outside that logic entirely, treating connectivity as something that should follow the user, not geography.

That belief shows up clearly in how the brand goes to market. Its 2025 *Avoid Roaming Regret* campaign leaned into humour and cultural truth, presenting roaming charges as something travellers tolerate rather than accept. In early 2026, its Global Nomad Pass partnership pushed the brand deeper into remote work and digital nomad culture, driving rapid awareness growth by meeting users inside communities rather than through traditional telecom media. Airalo is not marketing data plans. It is marketing freedom from thinking about connectivity at all, which is exactly where the category is heading.





MANORS

THE CONTEXT

Golf is drawing in a new generation of players, yet the category remains shaped by decades of performance optimization, institutional tradition, and signals of inherited access. For years, golf brands have competed on technical innovation, fabric performance, and equipment precision, reinforcing an image of the sport as something to be mastered, measured, and perfected. As new audiences enter the game through more accessible and culturally fluid entry points, a disconnect is emerging between how golf is now being experienced and how the category continues to define it.

Manors is building directly inside that shift. Rather than competing on performance claims, the brand reframes golf as a lifestyle rooted in exploration, culture, and identity, placing the sport in conversation with fashion, travel, and community. In doing so, Manors is helping reposition golf from a specialized athletic pursuit into a cultural activity people integrate into how they live, not just how they play.

THE STRATEGY

Manors is built on a clear challenger decision: golf is not a sport to perfect; it is a culture to explore. While legacy brands continue to define the game through performance metrics and technical innovation, Manors shifts the focus toward experience, identity, and immersion. The brand treats golf not as a system to master, but as an environment people move through, shaped by landscape, mood, and community. Participation is reframed from technical competence into cultural alignment.

This decision establishes the lens through which every campaign, collaboration, and product is developed. Exploration replaces optimisation as the organising principle of the brand.

DIFFERENTIATION

Manors differentiates by operationalising that belief in ways legacy brands cannot easily replicate. The Reebok x Manors “No Thanks, I’ll Walk” campaign translates exploration into provocation, using the rejection of golf cart culture to symbolise a broader refusal of efficiency-driven sport. Rather than lean into

MANORS ❧

the pervasive idea that you must have a golf cart, the go counter-culture and lean into an almost forgotten mindset that you should walk a golf course purely for the beauty of it. That's not efficient, it's not cool, but it is something captivating and every golfer in their audience who has ever walked a course would know the feeling immediately.

That structural difference extends beyond campaign moments. Manors distributes through fashion-led retailers like Ssense and Harrods, expanding its competitive set into lifestyle and luxury rather than remaining inside golf pro shops. The product is designed to function off-course as easily as on it, removing the need for category-specific identity. Long-form cinematic storytelling replaces short-form performance marketing, building emotional investment that drives loyalty and partnership revenue. Manors Golf is not differentiating through better gear. It is differentiating through category redefinition.

RELEVANCE

Manors demonstrates relevance by building golf around how younger audiences already experience sport, as something social, cultural, and integrated into everyday life rather than isolated as technical performance. This is most visible through exploration-led storytelling platforms like *A Change of Course* and endurance challenges such as the *Shetland Challenge*, which position golf as part of travel, landscape, and shared experience rather than competition or mastery. By framing golf through exploration and environment, the brand reflects a broader shift where participation is as much about identity and experience as it is about performance.

This philosophy extends into physical experiences. Community tournaments, invitationals, and social-first formats like the

MANORS Open Scramble prioritise participation and atmosphere over elite competition. Expansion into markets like the U.S. follows the same logic, focusing on environments where sport and lifestyle already intersect. Rather than relying on messaging alone, Manors builds real entry points that mirror how a new generation already engages with the game.

TALKABILITY

Manors builds talkability by designing campaigns that cut through culture rather than sit safely within category norms. The Foul Weather collection demonstrates this clearly. In a sport defined by the phrase "fair weather golfer," the campaign name reframes a familiar term and introduces tension immediately. The hero film, shot in Iceland's extreme conditions, turns a seasonal launch into cinematic narrative. On social, a striking visual of thousands of golf balls fired across a putting green becomes the hook that drives attention and sharing. The campaign does not rely on technical claims to generate interest. It relies on a clear idea and visual execution strong enough to provoke reaction.

This output is shaped by a deliberate creative discipline. The team runs regular creative punch-up sessions to pressure-test ideas until they are distinct enough to cut through, treating campaign naming, hero content, and social distribution as interconnected decisions rather than isolated tasks. Speaking on Scratch, Rival's podcast, Head of Marketing, Alex Ames described the cultural shift reshaping golf: "What happened in recent years... was social media... so much of it was the beauty, just like being able to show, 'look at where I am' with your iPhone." Manors builds campaigns that align with that behavioural shift, ensuring the work travels because it reflects how the game is now experienced, interpreted, and shared.





COMMERCIAL IMPACT

Manors demonstrates how culture-led positioning can translate directly into commercial performance. Curo search data shows steady multi-year demand growth, rising from niche levels to peak interest between 2021 and 2025, signalling organic momentum rather than campaign-driven spikes. Strong co-search associations with brands like Reebok, alongside consistent comparison behaviour with Nike and Adidas, show Manors is competing within broader sportswear and lifestyle consideration sets, not just golf. High product-led search behaviour, with roughly 47% tied to product intent, suggests cultural discovery is converting into active purchase rather than passive awareness.

This momentum is reinforced by how the brand monetises culture directly. More than 25% of revenue now comes from partnerships and collaborations, validating Manors as a cultural access point for larger sportswear players. Search signals around collaboration partners reinforce partnerships as both discovery and revenue drivers, while associations with entry-level golf culture and younger audiences suggest Manors is expanding the addressable market for golf apparel. The commercial signal is a brand growing through category expansion rather than direct share capture.

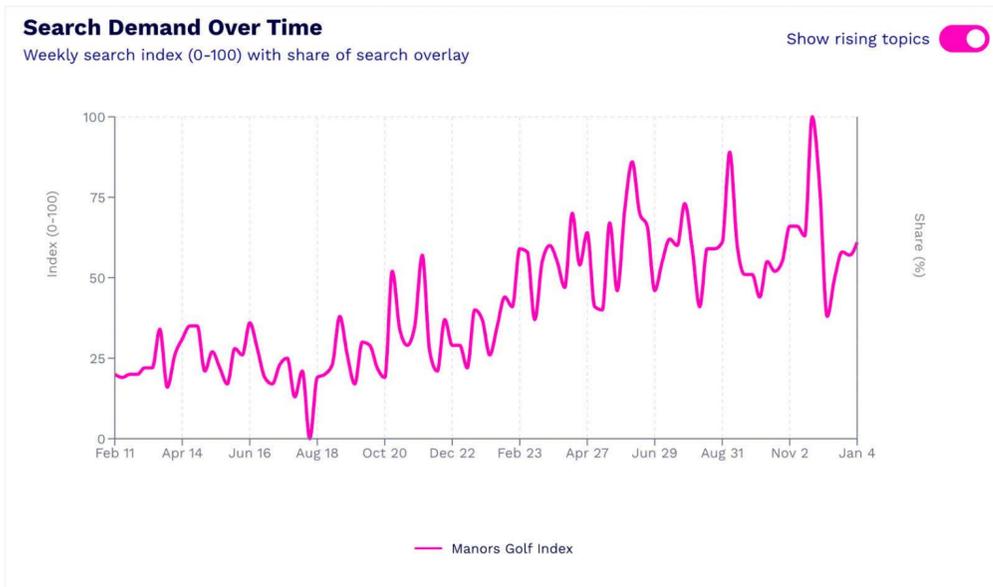


Figure Two: Search demand for Manors Golf over time (Source: Curo by Rival).

RIVAL'S TAKEAWAYS

1. REDEFINE WHO YOUR CATEGORY IS FOR THROUGH MARKETING.

Build campaigns that visibly show new audiences participating in ways your category has never represented before.

2. BUILD LOYALTY THROUGH SUSTAINED MARKETING STORYTELLING.

Invest in narrative campaigns and content ecosystems that keep your core audience engaged over time, not just short-term algorithmic spikes.

3. PLACE YOUR BRAND INSIDE CULTURE THROUGH MARKETING.

Use partnerships, platforms, and campaigns to show up in lifestyle and community conversations, not just product comparison moments.



SURI

Oral care has spent decades trying to look more technical. More modes. More sensors. More reasons to upgrade something that fundamentally still cleans teeth. SURI approached the category from a completely different starting point by asking why everyday health products are designed to be thrown away in the first place.

In 2025, that philosophy translated into campaign-level visibility through creator-led and retail storytelling pushes built around sustainability and lifetime product design. Seasonal retail activations and creator partnerships centred around “buy once” product positioning helped drive the brand past one million units sold while placing it culturally closer to premium beauty and sustainable tech than oral hygiene. SURI does not market features. It markets a rejection of disposability, and that message has become its most powerful growth lever.





Flo

THE CONTEXT

As society evolves, certain topics that were once considered taboo have become more acceptable to discuss in public. Yet after decades of associated shame and embarrassment, the menstrual cycle is still a topic that mainstream discourse suggests should be spoken about in hushed tones. When it comes to period care, marketing tactics have historically been built on discretion as a strategy.

For decades, the category normalized menstruation by sanitizing it. Tampons, menstrual cups and pads wrapped in euphemistic language, pastel packaging, and blue liquid demonstrations created a version of periods that is socially acceptable, but emotionally detached from lived experience. Rising scrutiny around period product safety, including investigations into heavy metals and pesticide exposure, has shifted attention from discretion to transparency. The category is moving from “don’t talk about it” to “prove you’re safe and honest,” and few legacy players are structurally built for that shift.

THE STRATEGY

Rather than normalising periods by making them less visible, Here We Flo normalises them by placing them in environments where they have historically been excluded. Where incumbents relied on discretion and soft-coded language, the brand set out to make menstruation culturally undeniable. This is most clearly expressed in the Chelsea FC Women partnership and the “*We Don’t Bleed Blue. We Bleed. Period.*” campaign. Placing period care branding on the back of football shorts was a structural reframing of where menstrual conversations are allowed to exist. When players walked out wearing shorts marked with simulated period blood, the message was direct. Periods happen during elite sport.

The same logic extends into product and retail strategy. By entering mass retail environments like Boots, Tesco, and Sainsbury’s, Here We Flo positions safer period care as everyday rather than niche. The brand removes both cultural and physical friction by making products as visible and convenient as legacy options. By reducing embarrassment and increasing accessibility at shelf level, Here We Flo shows how emotional safety and cultural acceptance can function as a commercial growth strategy.



DIFFERENTIATION

Here We Flo differentiates first through how the brand looks and speaks in the world. While legacy period care brands built equity on pastel palettes, euphemistic language, and clinical reassurance, Here We Flo built a brand designed to feel loud, direct, and impossible to ignore. Its tone is explicit, humorous, and unapologetically honest about menstruation, rejecting the category's reliance on coded language and discretion. This was especially visible during the brand's Boston market entry, where OOH used bold colour blocking, direct copy, and period-explicit messaging to position the brand as a culturally confident consumer brand rather than a wellness niche player.

This differentiation carries into the physical product through packaging designed to disrupt on-shelf. Tampons are packaged in cardboard formats resembling ice cream tubs rather than traditional period boxes, creating instant distinction in a category where most packaging blends together. The format removes clinical cues that have historically defined period care. By pairing confident brand expression with shelf-level visual disruption, Here We Flo ensures the product communicates its challenger belief before a consumer reads a claim.

RELEVANCE

Here We Flo is relevant because it sits at the intersection of two major category shifts: the move toward better-for-you period care and the cultural demand for more honest representation of women's bodies. As scrutiny around tampon safety, toxic shock syndrome, and material transparency has increased, consumers have begun questioning the assumption that regulatory compliance automatically equals safety.

Third-party certification has become a key trust signal, and Here We Flo's use of standards such as Oeko-Tex Standard 100 and gynaecological approval positions the brand inside this shift. What was once niche organic positioning now reads as baseline expectation, particularly for younger consumers who expect independent verification rather than brand claims.

The Chelsea FC Women partnership shows how this product shift translates into cultural relevance. As women's sport grows in visibility and audience engagement, brands are increasingly expected to support the realities female athletes navigate. The "We Don't Bleed Blue. We Bleed. Period." campaign reinforces product credibility while making menstruation visible in a space where it has historically been ignored. By showing up in women's sport as a sponsor of biological reality rather than performance, Here We Flo positions itself inside how period care is evolving today.

TALKABILITY

Here We Flo generates talkability by deliberately crossing cultural lines the category trained consumers not to notice, most clearly in *The British Are Coming* U.S. launch campaign. Created to announce expansion into CVS and Target, the campaign reframed a historic American phrase into a sexually explicit and culturally provocative market entry statement, using "The British Are COMING" to introduce condoms, lubricants, and period products simultaneously. By launching around July 4 and concentrating activity in New England, the campaign combined historical reference, national identity, and category disruption into a single moment, turning a retail launch into mainstream cultural conversation.

The talkability came from how precisely the provocation was constructed. Humour made the creative shareable, while historical framing made it culturally legible beyond the category. The campaign created multiple entry points for conversation, including sexual wellness stigma, period stigma, and sustainability in intimate care. By turning a market entry into a culturally loaded moment, Here We Flo used conversation as a growth strategy, entering new markets already embedded in cultural discussion.





COMMERCIAL IMPACT

Here We Flo’s commercial momentum is being driven by its ability to scale challenger beliefs into mainstream retail behaviour. Curo search data and Google Trends analysis show a sharp rise in branded search demand from near-zero visibility pre-2024 to peak interest by 2025, signalling structural brand discovery rather than campaign-driven spikes. Branded search is also outpacing generic category terms, suggesting consumers are actively seeking the brand rather than researching period care more broadly. Strong retail-linked search associations indicate discovery is increasingly happening in-store first, then converting through online research and purchase.

This pattern reflects a model where accessibility becomes a commercial advantage. Search signals show Here We Flo entering incumbent consideration sets and capturing switching intent. Rather than relying purely on direct-to-consumer growth, the brand is converting cultural trust into retail velocity through expanding distribution and operational investment. The commercial signal is a brand scaling clean, transparent period care into everyday purchasing behaviour, where cultural relevance translates into shelf presence, retailer confidence, and repeat purchase demand.

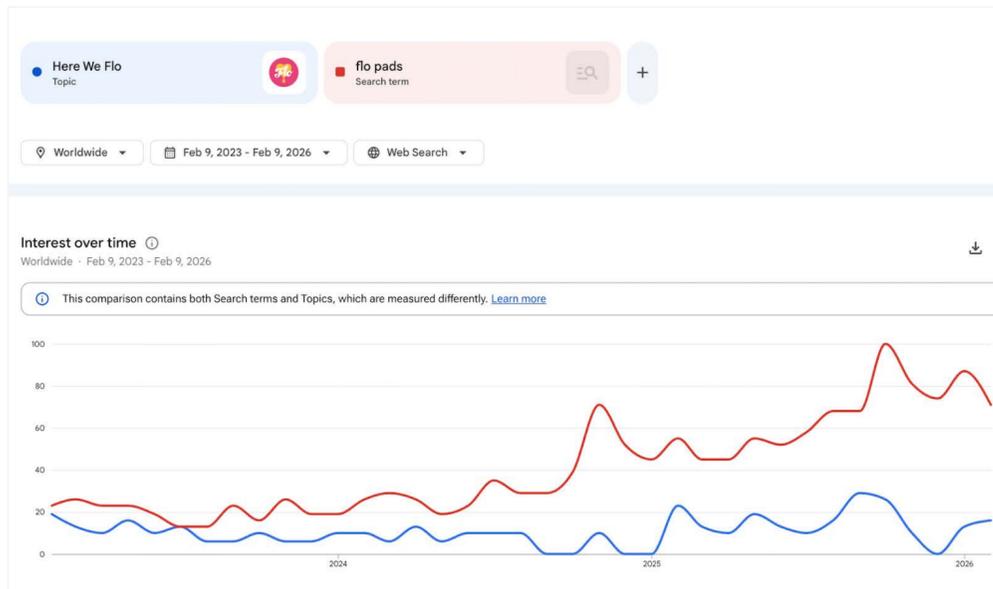


Figure Three: Search interest over time for Here We Flo (Source: Google Trends).

RIVAL'S TAKEAWAYS

1. EXPOSE THE TRUTHS YOUR CATEGORY AVOIDS.

Build campaigns around the realities competitors edit out, and distribute them in channels where your audience can't ignore them.

2. TURN INCUMBENT DISTRUST INTO YOUR MARKETING PROOF.

Show, in campaigns and product storytelling, why your brand is the better choice both functionally and ethically.

3. MAKE PRODUCT PERFORMANCE THE HERO, NOT JUST YOUR PURPOSE.

Build campaigns that prove why your product is better in real customer situations, then connect that proof to the impact or cause you support.

noble mobile

Telecom pricing has historically been built on anxiety. Customers are encouraged to buy more data than they need because running out feels worse than overspending. Noble Mobile flipped that psychology by building a model that rewards restraint instead of excess.

Its 2025 launch functioned as a campaign in itself. Founding member programmes, launch PR and digital wellbeing partnerships framed Noble as part of the solution to screen fatigue rather than another driver of it. The brand leaned into the provocation of paying customers to use less, turning the business model into a conversation driver across tech, wellness, and culture media. Noble does not need to shout to be talked about. The premise does that work for them.





NEKO

THE CONTEXT

Modern healthcare still largely operates on the assumption that intervention should follow visible illness. Across public and private systems, preventative diagnostics are typically restricted by age thresholds, cost barriers, or risk categorisation, leaving large segments of the population excluded from early detection. Even in high-spend healthcare markets, most funding still flows toward treating chronic disease after it develops rather than preventing it. At the same time, chronic conditions are appearing earlier, while consumers are becoming more health-literate, more data-driven, and less willing to accept systems that require them to wait until something is wrong.

Neko enters a category where preventative care sits between luxury optimisation and limited public access, while adjacent wellness and performance industries continue to normalise continuous health tracking. As longevity, performance, and preventative care become cultural priorities, the shift underway is behavioural as much as clinical. The question is no longer whether preventative diagnostics are possible, but whether they can become part of everyday life rather than something reserved for medical concern.

THE STRATEGY

Neko Health is built on a belief that sounds simple but is structurally disruptive. Preventative healthcare has to become desirable before it can become routine. Rather than competing as a diagnostic provider, Neko has made a strategic decision to position itself as a proactive health experience that people choose to return to, not an appointment they are told to attend. The brand focuses on removing the fear, friction, and intimidation that have historically kept healthy people away from preventative care, based on the view that the barrier to adoption is cultural and experiential rather than medical capability.

This decision shapes how the brand shows up in culture. Neko leads with design, lifestyle, and community context rather than traditional healthcare messaging. Scanning environments follow high-service retail principles, customers are referred to as members rather than patients, and campaigns like the *Love Letter* city series remove clinical imagery in favour of celebrating people and place. The strategic position is that preventative healthcare should feel like infrastructure for living rather than a response to illness, helping shift preventative care from obligation into repeatable behaviour.

DIFFERENTIATION

Neko Health differentiates through design and cultural integration rather than technology or clinical framing. The brand treats preventative healthcare as a spatial and cultural experience, most clearly expressed through its *Love Letter* location strategy. Campaigns like *A Love Letter* to Manchester introduce the brand through local creators, community identity, and city pride rather than traditional healthcare messaging. In parallel, clinic environments follow a high-design, high-service philosophy that lowers psychological barriers and reframes preventative care as something people want to participate in and share socially.



Beneath that cultural layer sits a materially different product and commercial model. The scan captures millions of data points across multiple health markers in a single visit, with around 1.2 percent of scans identifying potentially life-threatening conditions, most in people who were previously unaware. More than a quarter of serious findings occur in people under 50. With around 80 percent of members pre-paying for the following year, engagement begins to resemble subscription behaviour rather than traditional healthcare usage. Pricing supports accessibility rather than leading differentiation, while culturally the brand operates in an attainable luxury space, borrowing cues from premium retail and hospitality.

RELEVANCE

Neko Health is relevant because it aligns with how younger consumers already think about health. Gen Z and Millennials are driving a \$1.8 trillion global wellness economy and are already conditioned by wearables, sleep tracking, and performance optimisation tools. What has been missing is infrastructure that translates that behaviour into medically actionable insight without losing the clarity and experience standards of consumer technology. Neko bridges that gap by packaging advanced diagnostics inside an experience that feels familiar to digital-native consumers, while directly serving the excluded middle who are too young for routine preventative screening but old enough to want baseline health data.

Demand signals reinforce this cultural fit. Neko's global waitlist has grown from roughly 100,000 to more than 300,000 within a year, with some US consumers joining European waitlists ahead

of the brand's New York expansion. Search behaviour shows brand-level intent rather than founder halo, with Neko-specific search terms growing more than 2,500 percent. Content like the Neko Story series and data-led campaigns such as The Neko Data Story reinforce this relevance by framing health data as empowering and personal rather than clinical or fear-based.

TALKABILITY

Neko Health generates talkability by consistently violating category expectations. Clinics are designed like luxury retail environments, scans are positioned as lifestyle rituals, and marketing focuses on participation in life rather than disease detection. Strategic placements in lifestyle and design media such as Wallpaper, British Vogue, and Creative Boom moved preventative healthcare into cultural conversation rather than medical discourse, driving organic social behaviour where members share the experience and participation becomes a signal of identity rather than illness.

The waitlist became one of Neko's most effective talkability engines because it was designed as a social mechanic rather than an operational queue. Early access was structured to feel like a limited cultural drop, where sharing and referral behaviour helped people move up the list. Borrowing from startup and luxury launch playbooks, this turned demand into visible social proof before clinics opened. Moments like the NYC waitlist tease amplified this effect, making preventative diagnostics a status symbol instead of a mundane process.

COMMERCIAL IMPACT

Commercial momentum is reinforcing the same strategic logic that underpins Neko's brand, product, and cultural positioning. In January 2025, the company reached a valuation of roughly \$1.8 billion following a \$260 million Series B round. Revenue reached approximately \$21.9 million in 2025, while total completed scans surpassed 15,000 across Stockholm and London. Projections suggest roughly 200,000 scans annually by 2026 as new locations come online. Expansion into New York in 2026 will mark the company's first entry into the US and test the model inside one of the world's most expensive and reactive healthcare systems.

More importantly, the model reflects a structural shift in how preventative healthcare can scale. High retention, driven by members pre-committing to future scans, creates behaviour closer to subscription platforms than traditional healthcare usage. Combined with experience-led design and cultural positioning, Neko is building a preventative care business that behaves more like a consumer platform than a traditional healthcare provider, linking brand behaviour directly to commercial performance.

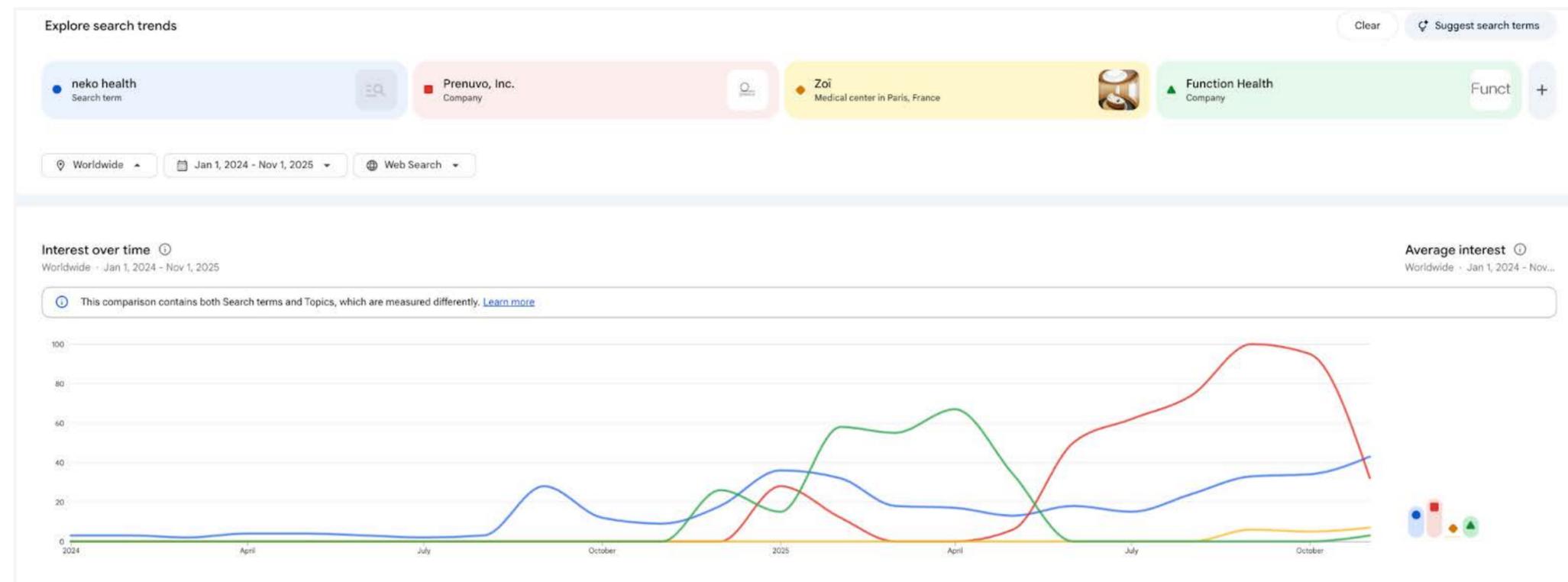


Figure Four: Search interest over time for Neko Health (Source: Google Trends).

RIVAL'S TAKEAWAYS

1. TURN SCARCITY INTO A GROWTH FLYWHEEL, NOT A FRICTION POINT.

Make waitlists, city launches, and early access visible and socially contagious so operational limits amplify demand.

2. WIN BY REWRITING THE EMOTIONAL RULES OF THE CATEGORY.

Reposition your product from fear-driven obligation to lifestyle-driven aspiration through brand, experience, and campaigns.

3. DESIGN THE BRAND TO MANUFACTURE REPEAT BEHAVIOR.

Build messaging and experience that reinforce membership, routine use, and subscription-like loyalty.



BuzzBallz®

Alcohol brands traditionally compete by trying to look more premium. Better ingredients. Better craft. Better heritage stories. BuzzBallz built scale by doing the opposite, turning itself into something instantly recognizable, slightly chaotic, and culturally shareable.

That approach accelerated in 2025 through highly visible campaign activity. The *Support The Cause* national awareness campaign blended social impact, merchandise, and social storytelling to extend the brand beyond drinking occasions. At the same time, product-led campaign pushes around *Grapes Gone Wild*, and *KettleBallz* used nostalgia, celebrity content, and drop culture mechanics to drive social conversation. BuzzBallz wins by behaving like a piece of pop culture first and a drinks brand second.





THE CONTEXT

For decades, entertainment power largely sat with institutions. Studios, publishers, and production houses decided which stories were worth telling and distributed them at scale, with success determined by gatekeepers rather than audience demand. That structure is now being reshaped by two cultural forces. The creator economy allows individuals to build global audiences before institutions engage, while fandom has shifted from passive consumption to active participation, where communities help shape narratives through conversation, remix culture, and shared storytelling.

Comics sit at the center of this shift, yet much of the traditional category still operates through print economics, editorial selection, and franchise-first thinking. At the same time, digital behaviour has moved toward mobile-first reading, vertical formats, and community-driven discovery. WEBTOON did not simply move comics online. It changed how stories earn cultural legitimacy. By the mid-2020s, the platform reached more than 170 million monthly active users and supported more than 24 million creators, while hundreds of titles expanded into film, television, and publishing.

THE STRATEGY

WEBTOON's challenger decision is to shift entertainment power away from institutions and toward creators, then build marketing that makes that shift culturally visible. Rather than behaving like a publisher promoting finished intellectual property, WEBTOON positions itself as the infrastructure where stories, creators, and fandom communities form before IP is monetised elsewhere. In this model, success is not decided by studios. It emerges through audience behaviour, community participation, and creator momentum.

This strategy is expressed through campaigns built around creation rather than finished stories. Partnerships such as Apple's *Made on iPad* collaboration focused on creator workflows, showing artists producing live work while integrating new illustrations directly into ongoing WEBTOON episodes. At a platform level, products like CANVAS extend this logic by lowering the barrier to publishing and allowing hits to emerge through community interaction. Rather than pushing individual titles, WEBTOON builds systems that allow success to surface through behaviour and fandom engagement, competing to own the system where stories become culturally inevitable.

DIFFERENTIATION

WEBTOON differentiates by positioning itself not as the destination for entertainment, but as the system that produces it. The platform dominates discovery in digital comics, with audiences searching for creators and series rather than the platform itself, signalling WEBTOON's role as infrastructure. As traditional comics category signals fluctuate, WEBTOON's influence continues expanding across streaming, gaming, and film as its stories scale into wider entertainment ecosystems. The platform becomes less visible at the brand level as its cultural output becomes more visible everywhere else.

The Apple x WEBTOON *Made on iPad* campaign makes this differentiation tangible by focusing on creators rather than finished intellectual property. Artists documented their workflows using iPad Pro and Apple Pencil, while new illustrations were inserted directly into live WEBTOON episodes, turning creation into entertainment content. Where traditional partnerships showcase characters, WEBTOON showcases the people behind them, reinforcing its role as the platform where creators, audiences, and culture connect before stories scale.

RELEVANCE

WEBTOON is culturally relevant because it reflects how younger audiences experience entertainment as identity, community, and social belonging. Fandom is no longer just about consuming stories. It is about forming friendships, building shared

language, and participating in culture together. WEBTOON is designed for this behaviour, with readers interacting directly with creators while community rituals such as commenting, voting, and meme culture create shared identity inside fandoms. The platform functions as a social destination as much as a content environment, aligning with a generation that expects entertainment to be participatory and socially embedded.

This relevance is reinforced through WEBTOON's presence inside major fandom spaces and global entertainment ecosystems. Its six panels at New York Comic Con positioned the platform as a central player in mainstream fandom culture. Partnerships with companies like Disney and Warner Bros. Animation further reinforce WEBTOON's role as a global story engine, where creator-driven IP can scale into major entertainment franchises. In this model, community carries more cultural weight than geography.

TALKABILITY

WEBTOON generates talkability by making creation itself part of the entertainment experience. Creator YouTube channels, behind-the-scenes content, and direct creator-reader interaction turn storytelling into an ongoing narrative rather than a finished product. Community behaviour amplifies this through Reddit ecosystems, voting rituals, theory culture, and social speculation, creating continuous conversation cycles that do not rely on traditional paid media. In this model, discussion is not a byproduct of release moments. It is the product itself.

The Webcomic Legends Contest shows how this talkability is structurally engineered. By inviting creators to compete for visibility and recognition, the contest turns talent discovery into a participatory cultural event where fans help decide success. As creators gain momentum, conversation spreads across social platforms and fandom communities, creating a loop where success inside WEBTOON drives external visibility and feeds back into the platform. This allows WEBTOON to remain culturally present without relying on traditional campaign noise.



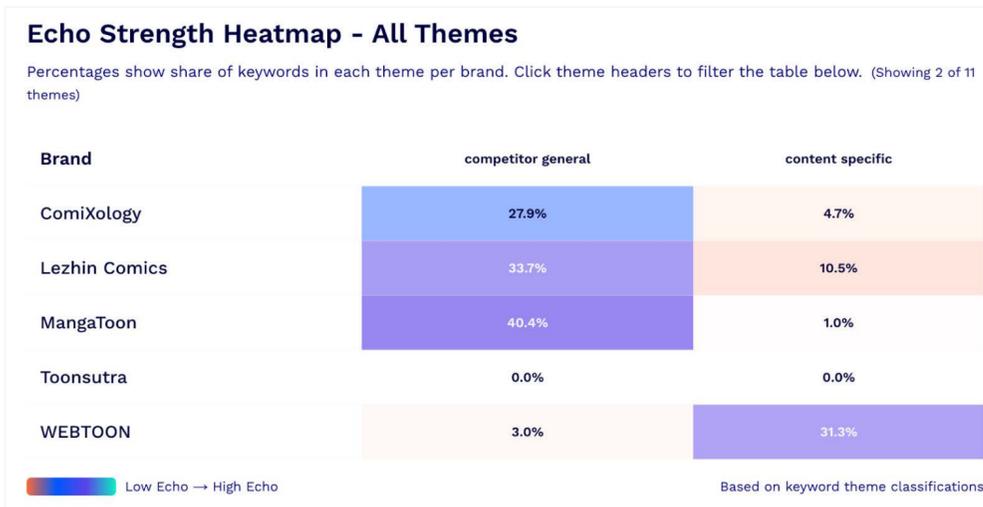


Figure Five: Content-specific search share for WEBTOON (31.3%) compared to category competitors (Source: Curo by Rival).

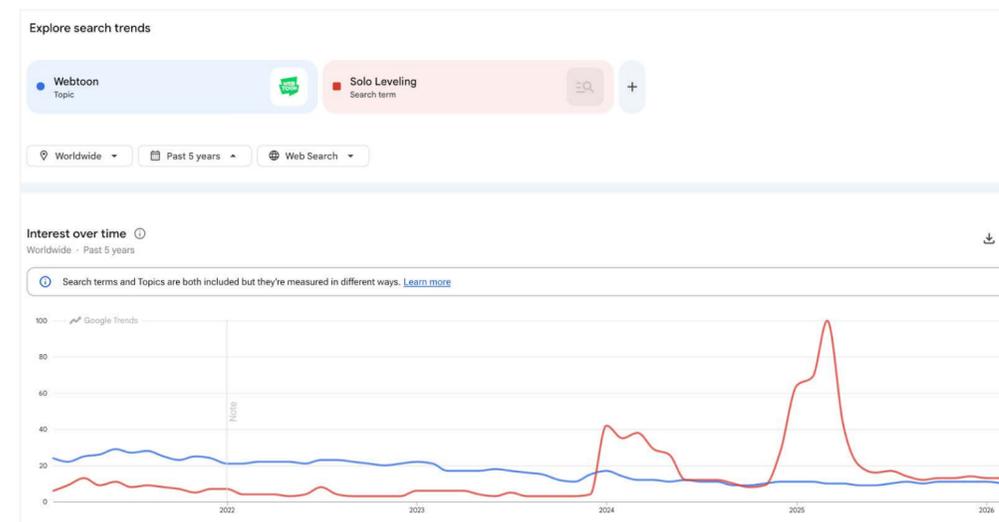


Figure Six: Search interest for Solo Leveling, a flagship title published on the platform, relative to WEBTOON (Source: Google Trends).

COMMERCIAL IMPACT

WEBTOON’s commercial strength comes from proving that a platform model can scale more reliably than a single-IP entertainment business. Its roughly \$2.7 billion IPO valuation in 2024 reflected confidence in an ecosystem built on creator volume, audience participation, and continuous story development rather than on a small portfolio of franchise bets. More importantly, WEBTOON has positioned itself as a pre-validation engine for the entertainment industry. Instead of investing heavily to test new intellectual property, studios can license stories that have already proven cultural traction through community engagement, audience growth, and sustained fandom behaviour.

This fundamentally reshapes risk economics across entertainment. WEBTOON distributes development across millions of creators, allowing breakout stories to emerge organically before they are scaled across television, film, gaming, and publishing. At scale, the platform operates closer to Spotify for narrative storytelling or YouTube for serialized IP development. WEBTOON does not just distribute culture. It builds the conditions for culture to emerge, scale, and commercialize through participation.

RIVAL’S TAKEAWAYS

1. MAKE PEOPLE THE STORY, NOT THE PRODUCT.

Build campaigns that elevate the users (and/or creators) and their process, not just the output.

2. DESIGN FOR PARTICIPATION.

Retention and organic growth increase when interaction and community behaviour are built into the core experience.

3. FOLLOW EXISTING AUDIENCE BEHAVIOUR.

If customers are already creating or driving conversation, use that signal to guide where you invest and scale.

YOCO

Small businesses have never lacked demand. What they have lacked is a financial infrastructure designed around how they actually operate. Yoco built its platform around that reality, starting with payments and expanding into the tools and funding that allow small businesses to grow.

In 2025, that positioning showed up through Yoco Exchange, a large-scale ecosystem campaign experience bringing merchants, education, and product into a single platform moment. This sat alongside ongoing brand campaign storytelling such as We The Underdog, which continues to centre real merchant journeys rather than idealised entrepreneurship. Yoco's marketing works because it does not present itself as fintech. It presents itself as economic enablement.



