



A Strategic Roadmap for Jellycat's Brand Transformation

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Abstract. With the continuous development of society, the pace of life and people's daily stress have increased. Nowadays, people have moved past just needing things, they are now looking for an emotional connection. The British brand Jellycat tapped right into this shift. They successfully evolved from just being a baby brand into a premium gift maker for people of all ages. People love them for their personality and because they feel like real friends. However, the strategic mechanisms driving this brand transformation remain unexplained. This paper uses observation, content analysis, and text analysis to study the successful transformation of the Jellycat brand. Research reveals that Jellycat's transformation depends on two things: the emotional appeal of its toys and the creation of a closed-loop emotional economy. Jellycat uses soft marketing to tap into the need for uniqueness and companionship. This strategy turns their products into social currency, rather than just simple goods. Simultaneously, the goal is to differentiate the brand through design innovation and superior quality, without compromising on consistent standards. This study investigates how Jellycat leveraged design innovation, marketing tactics, and consumer insights to drive its brand evolution. This study shows how marketers can secure a unique position and build long-term value, even when competition is fierce.

Keywords: Emotional Support; Brands Transformation; Jellycat; Marketplace

1 Introduction

Jellycat is a British brand founded in 1999, initially positioned as a provider of baby and maternity products. With the improvement of material living standards, societal pressures and loneliness have become increasingly prevalent. Consumers are now more willing to pay for products that offer emotional value, shifting their purchasing decisions from “functional satisfaction” to “emotional fulfillment.” Jellycat officially repositioned itself in 2014 as a premium gift brand for all ages, undertaking a comprehensive redesign of its brand identity [1].

In a crowded market, clear positioning and smart marketing strategies are crucial. Jellycat implemented a modern marketing approach by creating a combination of storytelling and fun interactivity [2]. Jellycat has seen impressive financial growth. Revenue went from 1.33 billion in 2022 to 1.85 billion in 2023, be-fore jumping to 3.2 billion

in 2024. This achievement identifies that Jellycat's diverse strategies successfully reshaped the brand. At the same time, the design and delivery of brand emotionality has brought a new turnaround for the Jellycat brand [3]. However, the differences in the emotional demands of different consumers and the ways that the brand uses to keep competitive in the same market are still worthy of discussion. The discussion of these issues in this paper is of great significance to the study of Jellycat's brand transformation strategies.

2 Study Methodology

2.1 Perspective Taking

Observations were carried out over eight days between September 2 and 9, 2025. Totalling nine hours. The study was performed at the Jellycat store in Xi'an Xiaozhai Saige Shopping Center (B2 floor). The number of customers' streams of visitors was noted throughout the observation period.

2.2 Content Analysis Method

The author of this study selected several commonly used social media platforms to analyze the follower counts for the Jellycat brand. This study primarily selected three social platforms for analysis: Xiaohongshu, Taobao, and Douyin. The reason for selecting these platforms for this study is that Xiaohongshu, as a dynamic social platform where people share their daily lives, has become an indispensable part of people's lives and reflects their aesthetic preferences. As an online shopping platform used in people's daily lives, Taobao accurately and authentically reflects the material needs of contemporary society and the product preferences of different groups. In today's fast-paced era, the emergence of the Douyin platform has propelled brands into a new phase. First, the Douyin platform boasts a broader user base and greater brand exposure. Secondly, the Douyin platform enables faster brand dissemination and higher timeliness. This study's analysis of Jellycat's follower counts demonstrates that the brand primarily employs multi-platform promotion strategies, with each platform reaching a remarkably broad audience. The author of this study first compiled statistics on the number of fans across different age groups. Building on this foundation, this study also conducted a statistical analysis of Jellycat's social media content out-put. The brand released a Halloween limited edition in October 2023; launched a collaboration with Beast in May 2024; shared content about its offline experience stores in September 2024; and announced the appointment of Yang Mi as its celebrity brand ambassador in September 2025. Only two levels of headings should be numbered. Lower level headings remain unnumbered; they are format-ted as run-in headings.

2.3 Text Analysis Method

The author of this study analyzed Jellycat's brand marketing by examining the brand's official Taobao store website, examining user reviews and merchant pro-motions from two distinct perspectives. The author of this study reviewed video advertisements posted by the official Jellycat brand account on the Xiaohongshu online platform. These advertisements featured anthropomorphized plush toys set against various festive scenes. On June 3, 2025, the author purchased a Jelly-cat brand stuffed animal at a physical retail store and noticed the slogan "Please look after me" on the tag of the stuffed animal. On July 25, 2025, a visit to the Jellycat offline store at Raffles City in Shenzhen, Guangdong Province revealed that the Jellycat brand offers personalized embroidery customization services. Upon reviewing major official websites, the author discovered that Jelly-cat's standard promotional copy for its plush toys states: "Renowned for its luxurious quality, playful personalities, and adorable characters." The author observed that Jellycat consistently uses "for the joy" as a promotional tagline across their brand's social media content.

3 Research Findings

3.1 Observation Results

Jellycat's audience is extremely broad, encompassing consumers of different ages, demographics, and genders (see Table 1).

Table 1. Jellycat Brand Audience Profile

Code	User Profile
Code1	Student (International Student)
Code2	Urban working women
Code3	Refined Mothers Group
Code4	Trendy Male Demographic
Code5	Senior citizens
Code6	Others (gift-buying customers)

3.2 Content Analysis Results

Jellycat employs a multi-platform marketing approach, with varying follower counts across different platforms (see Table 2). Based on this discovery, This study also analyzed the volume of Jellycat brand social media content. Social media plays a crucial role in promoting the Jellycat brand through online and offline activities as well as cross-industry collaborations [1]. Research has found that the Jellycat brand employs more than just a multi-platform marketing ap-proach. The brand also expands its influence through collaborations with other brands to launch limited-edition collections and by inviting celebrity endorsers (see Table 3).

Table 2. Jellycat Brand Follower Counts Across Different Social Media Platforms

Social Media Platform	Jellycat Brand Follower Count
Rednote	860,000
Taobao	3.23 million
TikTok	1.135 million

Table 3. Jellycat Brand Social Media Output by Marketing Event

Marketing Event	Time	Social Media Output
Halloween Limited Edition	October 2023	1.5 million
520 Beast Collection Collaboration	May 2024	2 million
Offline Experience Store	September 2024	13.5 million
Celebrity Endorsement	April 2024	Within 10 items

3.3 Text Analysis Results

Based on user reviews, different user groups have varying purchasing needs for the Jellycat brand. Consumers not only prioritize the quality of the plush toys but also value the emotional significance they bring to people. As User A asked, "How's the floral rabbit design? Does it look cute? Does it shed?" User B said, "High school is stressful, and I don't get enough rest. Is it comfy to sleep with it?" Additionally, people also attach specific emotions to it. For example: conveying the affection of elders for their younger relatives. As User C said, "Would a 6-year-old girl like it?" Or to convey friendship among peers, as User D asked, "Would this make a suitable gift for a friend?" and to offer blessings for newborns, as User E inquired, "Is this suitable for newborns?" Young people prioritize self-indulgent consumption, self-healing, and self-enrichment when purchasing Jellycat products [4]. From the brand's promotional materials: Jellycat primarily employs soft marketing tactics, attracting users through happiness-centric messaging. The brand has evolved from infant comfort toys into a "premium brand for all ages," emphasizing its high-end positioning and creative designs. It highlights collectible and sentimental value while enhancing quality and safety, conveying joy through playfulness and interactivity. Its core positioning is "the world's softest comfort toy" [1]. Moreover, consumers can also learn about product information through platform advertisements [5]. Jellycat has made its products "unique" by launching various types of advertisements and offering personalized customization. This marketing approach transforms Jellycat plushies from ordinary stuffed toys into vessels of emotional value.

4 Discussion

Based on the findings from the preceding research, it can be concluded that the brand transformation of Jellycat has been successful. Jellycat's evolution from a single maternity and baby brand into a premium gift brand suitable for all ages stems not solely from the emotional value of its plush toys, but rather from the brand's deep collaboration across three key areas: audience insight, marketing strategies, and innovative content design.

4.1 Audience Needs: From Functional Satisfaction to Diverse Emotional Fulfillment

The success of Jellycat is not an accident, but a result of addressing the changing emotional needs of consumers. With the continuous stress and anxiety of modern society, The brand is highly respected by Gen Z and the older groups, who often face loneliness. Which points out that consumption offers psychological benefits that allow individuals to relieve their negative emotions through purchasing actions [6]. However, the symbolism of Jellycat's personification and unique story value make it not only a doll but also a friend, which makes people feel needed and wanted. Meanwhile, Jellycat provides a service for personalized embroidery customization, which can meet people's psychological need to feel unique. Observational data shows that Jellycat brand users are becoming more diversified, and the dolls are not only for kids, but are also becoming friends for everyone. In fact, people's consumption choices are changing from "practical needs" to "emotional needs". At the same time, Jellycat has already become a social currency. People use it as a tool to deliver a specific emotional meaning, not only to achieve their personal needs.

4.2 Marketing Approach: Through a Series of Soft Marketing Strategies to Promote the Emotional Connection Between the Consumer and the Dolls, to Achieve Brand Differentiation

The results of the study show that Jellycat promotes its products through different platforms, which combines the advantages of Taobao, Xiaohongshu, and Douyin, to build up the brand's voice everywhere. For consumers, the brand experience of a company will affect their first impression, even affect their shop-ping behavior so, a great brand experience will bring a sense of reliable and trustworthy feelings. There is no doubt that the brand image not only depends on their own ability, but also their development direction. But different images will attract different consumers and stand out in the same industry, enjoying a higher reputation. In the future, Jellycat will be enhance the stickiness of consumers and brand loyalty [7]. The text analysis shows that the Jellycat constantly emphasizes the value of "companionship", 'happiness' and "love" of their products, it makes that the brand reduces the trading value of goods, thus increasing the consumers' preference and creating a foundation of long term development of the brand. At the same time, the Jellycat brand is not limited to traditional sales, it also

partners with bookstores and can be seen in shopping malls and high streets everywhere. Jellycat successfully breaks market barriers through celebrity advocacy (e.g., Yang Mi) and cross-boundary co-branding (e.g., The Beast), and its offline experience stores and private custom embroidery service increase traffic to both online and offline channels, which greatly strengthen users' loyalty and support.

4.3 Content Innovation Design: Personified Design and Lifestyle-Oriented Product Design

Jellycat crafts not just plush toys but highly distinctive characters, its official advertisements endow these dolls with personality by placing them in everyday scenarios, this design fosters self-projection, letting consumers catch glimpses of their own identities reflected, such a connection deepens the emotional bond between owners and the products. It's clear that Jellycat's plush toys differ from traditional stuffed animal designs, they don't strive for full realism, instead using exaggeratedly soft materials and anthropomorphic shapes to evoke a sense of cuteness and comfort that surpasses real animals [8]. the brand also defies design conventions by integrating everyday objects, moving beyond standard animal forms, Jellycat introduces unconventional shapes like food and plants, this approach breathes life and soul into every unique thing in the world. From doll to playmate, from toy to companion, Jellycat has long transcended the category of ordinary plush toys, evolving into a brand symbol brimming with warmth and emotion [9]. The brand adopts a variety of materials to boost product diversity, while strictly adhering to international safety standards, it maintains high quality and meets market demands. Jellycat's plush toys stand out in their category thanks to their all-age appeal and creative design themes—food and plant motifs—which are hard to replicate, few brands in the industry use premium materials while meeting all-age safety standards, this scarcity enhances the brand's ability to command premium prices, so establishing Jellycat's unique competitive edge [10].

5 Conclusion

This study shows Jellycat caters to a broad consumer base with diverse demands, the brand's appeal goes beyond emotional connection and charming aesthetics, as it actively fosters an emotional economy through products customized for distinct customer groups. The brand has also expanded its creative reach, shifting from realistic animal designs to anthropomorphized daily items that spark a sense of home familiarity, based on this positioning Jellycat strengthens its market presence via consistent product quality and multi-faceted marketing strategies, which effectively drive the brand's steady growth. This research provides action-able insights for commercial enterprises, the reliability of these conclusions is closely linked to data quality, a notable limitation of this study lies in the narrow scope of data collection—since the analysis focused solely on co-branding cases from specific periods the sample size remains relatively small, so the findings may not fully cover the breadth of the brand's marketing efforts. Future studies should enlarge the sample size to verify these observations, in a highly competi-

tive market strategies relying solely on traffic generation and emotional appeal may prove unsustainable over the long term, but lasting success hinges on up-holding strict quality and safety standards while constantly adapting to evolving consumer preferences.

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