

Analysis of Jellycat Emotional Marketing Strategy and Branding

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Abstract: In contemporary society, with the improvement of material living standards and the transformation and upgrading of consumer attitudes, consumers are paying more and more attention to the acquisition of emotional value on the basis of meeting functional needs. Fierce market competition has prompted emotional marketing to gradually become the core strategy for brands to build differentiated competitive advantages. The article takes Jellycat brand as an example, and conducts an in-depth investigation on the use and effectiveness of emotional marketing on branding. By analyzing Jellycat's market positioning, product design and emotional marketing strategy, as well as its brand strategy, the article reveals the company's success in the "healing economy" environment. The results of the study show that emotional marketing can significantly increase consumers' brand awareness, favoritism and loyalty, and also provide valuable lessons for other brands. In the age of experience economy, emotional resonance can be integrated into the whole process of product development, brand communication and user operation, which can effectively strengthen the emotional memory of consumers, and then be transformed into a lasting competitive advantage in the market.

1 INTRODUCTION

In the post epidemic era of social change, Generation Z (born 1995-2009) is experiencing an unprecedented emotional crisis. Data show that the incidence of anxiety disorders has increased by 25% globally compared to the pre-epidemic period, with 63% of those aged 18-35 years old. This collective lack of emotion has given rise to the prosperity of the "loneliness economy" - research reports indicate that 72% of consumers are willing to pay a premium for products with emotional soothing features, and the size of the emotional consumption market will exceed \$1.2 trillion in 2023. As a result, the logic of consumer decision-making has undergone an essential shift - from traditional "maximization of functional utility" to "emotional value resonance" - which requires brands to redefine the path of value creation.

At the same time, the global plush toy market is experiencing structural changes, data show that the proportion of adult consumers (over 18 years old) will reach 43% in 2023, up 14 percentage points from 2018, with women aged 25-34 years old becoming the

core consumer group (NPD, 2023). Against this backdrop, Jellycat has realized explosive growth in the Chinese market. During 2018-2023, the compound annual growth rate of its revenue is as high as 47%, while the premium of its main product Bashful Bunny series on the second-hand trading platform even exceeds 680%. This phenomenon reflects the paradigm shift of the traditional toy industry from "a tool for children's entertainment" to "a vehicle for adult emotions", and Jellycat's success is not only due to its quality product design, but also because it Jellycat has been successful not only because of its quality product design, but also because it has turned plush toys into a high-premium emotional symbol to cater to consumers' emotional needs through emotional marketing.

As a new marketing strategy, emotion marketing has attracted a lot of attention from both academics and the industry in recent years. However, most of the existing research focuses on the theoretical framework and general application of emotional marketing, but lacks in-depth analysis of the success of specific brands, and the success of Jellycat brings a lot of real-world basis for the research of emotional

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marketing, and helps to deeply understand the mechanism of emotional marketing on branding, especially in the environment of the “healing economy” and consumer upgrading. The success of Jellycat brings a lot of practical evidence to the study of emotional marketing and helps to deeply understand the mechanism of emotional marketing on branding, especially in the “healing economy” and consumer upgrade. By deconstructing Jellycat's emotional marketing strategy, this study aims to provide a reference framework for other brands to implement, thus enriching the theoretical system of emotional marketing.

This study is dedicated to answering two key questions, how Jellycat transformed an average plush toy into an emotional symbol with 300% premium potential through careful product design, effective marketing and promotion, and community management strategies; and how the brand's emotional marketing strategy affects consumer decision-making.

By analyzing Jellycat's emotional marketing strategy, people can reveal how it enhances the brand's emotional value from the aspects of product design, social media interaction and consumer experience. At the same time, based on Jellycat's successful experience, a set of operable emotional marketing implementation framework is proposed, in order to be useful for other brands.

This paper adopts the case study method to deeply analyze the emotional marketing strategy of Jellycat brand and its market performance. By collecting brand development history, market data and consumer feedback, the key factors of its success are analyzed.

2 JELLYCAT BRAND OVERVIEW

2.1 Brand History and Development

Jellycat was founded in 1999 by brothers William Gatacre and Thomas Gatacre. The name comes from the founders' four-year-old son, who loves both jelly and cats and coined the word “Jellycat,” which is a fun combination that expresses the brand's unique, soft and healing style. Jellycat focuses on the development and manufacture of plush toys for people aged 0-100 years old, not only providing safe and soft toys for babies, but also healing and accompanying thousands of adults.

In the early days of the brand, Jellycat mainly focused on the European market, through high-end department stores and boutique toy stores and other niche channels to gradually build up the brand's reputation. As the brand's influence continues to expand, Jellycat began to focus on the global market, and gradually expand its market territory through a multi-channel sales strategy. After entering the Chinese market, Jellycat chose to cooperate with mainstream e-commerce platforms such as Jingdong and Taobao, and opened flagship stores on these platforms. This channel strategy not only ensures brand exposure, but also ensures the high-end positioning of the products.

2.2 Brand Positioning and Marketing Strategy

Jellycat is positioned not only as a plush toy, but also as an arena for conveying feelings and establishing warm connections. This position makes its products are not only toys, but also emotional support and healing medium. The traditional plush toy market is centered on children as the central consumer group. However, Jellycat has expanded its target market to adults, especially young people in urban areas. These young people work in a stressful environment, fast-paced lifestyle, the need for emotional support and healing, Jellycat to give the “warmth” and “comfort” just to meet their requirements. In Jingdong, Taobao and other platforms, there are a lot of user reviews show that not only parents buy these dolls for their children, there are also many adult consumers to buy them dolls, and even used by some people as home decoration, soothing the soul.

With the upgrading of consumption and increasing pressure of life in recent years, the “healing economy” is gradually emerging. Consumers are more concerned about their emotional fulfillment and inner freedom, and Jellycat has brought great opportunities to the market. through the design of products with warmth and healing characteristics, Jellycat has successfully catered to the emotional needs of consumers, which has been transformed into a market advantage. According to statistics, the global plush toy market will grow from 63.93 billion yuan in 2020 to 77.697 billion yuan in 2024, with a compound annual growth rate of 9.2%, and Jellycat is particularly prominent in this growth trend, which further proves its precise positioning in the field of emotional consumption.

Jellycat's marketing strategy also includes product design differentiation and high quality, Jellycat did not choose to fight a price war, but to win with

differentiated design and high quality products. Jellycat's products include the classic Bonny Rabbit and the Fruit and Vegetable series, which are innovative and optimized in terms of shape, touch and emotional expression. In addition, Jellycat has also launched many novel fruit and vegetable dolls. These fruits and vegetables dolls not only look interesting, but also give the dolls a richer meaning, such as representing a healthy, natural and positive lifestyle. This innovative design strategy has enriched the brand's product line and enabled the brand to attract more consumers.

3 THEORETICAL FOUNDATIONS OF EMOTIONAL MARKETING

3.1 Definition of Emotional Marketing

According to the research, Barry Feig (1988) in his book "Marketing - Attacking the Heart" first introduced emotion into marketing theory in a comprehensive way and named it "emotional marketing". He believed that image and emotion are the source of power in the marketing world, and that understanding customers' needs and meeting their requirements to build a strategic product model is the key to success in the modern marketing market. After that, Li Jin and Li Jinkui (2005) pointed out in the book "Emotional Marketing" that emotional marketing is to take the consumers' personal emotional differences and needs as the core of the enterprise's marketing strategy, throughout the entire marketing process, and then through the emotional branding, emotional products, emotional prices, emotional distribution, emotional promotions, and other strategies to achieve the enterprise's business objectives. This is also a commonly accepted and recognized definition within the academic community.

Comprehensively, the above analysis can be concluded that emotional marketing is a marketing strategy that focuses on consumers' emotions and strengthens the association between brands and consumers by stimulating and applying consumers' emotional responses. In short, emotional marketing is to take consumers' personal emotional differences and needs as the core of a company's marketing strategy (Jing, 2022). It does not just focus on the functional features of a product, but also places high importance on the emotional value and user experience that a product or service can convey.

Emotional marketing aims to create a deep psycho-emotional connection between consumers and the brand through emotional resonance in order to enhance brand loyalty and consumer purchase intention.

3.2 Characteristics of Emotional Marketing

In the process of emotional marketing, "emotion" is the connection between customers and brands, and is an important factor in the interaction between people and brands (Xu, 2015). The core features of emotional marketing are reflected in the following five dimensions, each of which has profoundly reshaped the way modern brands connect with consumers.

3.2.1 Emotional Migration of Value Anchors

The essence of emotional marketing is to make the consumer decision driver change from product function to emotional resonance. Research shows that emotional responses can quickly activate the brain's limbic system and thus play an important role in the decision-making process (Xia, 2022), which allows brands to construct consumer perceptions more effectively by stimulating joy, belongingness or healing emotions. In the case of Jellycat, for example, its ultra-soft touch design inspires consumers' desire for comfort, elevating it from an ordinary plush toy to a tool for emotional sustenance. According to the user survey, as much as 73% of the purchase intention comes more from the emotional demand than the actual function.

3.2.2 Deep Immersion of Interactive Experience

Contemporary emotional marketing breaks the one-way communication mode of traditional advertising and constructs a multi-sensory synergistic immersion experience. This kind of interaction not only involves basic senses such as vision and hearing, but also extends to tactile feedback, olfactory memory and even proprioception. Such a multidimensional synergy of senses can make the brand memory retention rate reach 3.2 times.

3.2.3 Ritual Construction for Value Transmission

Brands can strengthen emotional memory by turning consumption behaviors into symbolic rituals. Research has shown that the act of symbolization can increase the strength of emotional memory by 2.8

times. Custom embroidery for Jellycat dolls and naming services for Starbucks custom cups can turn mundane transactions into emotional rituals.

3.2.4 Long-Term Extension of the Effect Cycle

Unlike traditional marketing, which seeks instant conversion, emotional marketing has a significant long-tail effect. Although the initial input-output ratio is lower than that of performance advertising, its user lifecycle value (LTV) can be up to 3.7 times higher than that of traditional methods after 12 months. Jellycat's private-domain users spend an average of \$324 per year, which is 2.3 times higher than that of its public-domain users, and this continuous emotional connection gives brands a structural advantage in the face of rising traffic costs.

3.2.5 Symbolic Transformation of Social Identity

Emotional marketing ultimately transforms products into social identity symbols, forming a cultural circle barrier. When consumers through the Jellycat doll combination to build "emotional personality portrait", or in the social media to show the number of dolls they have, the product has evolved into a social relationship in the meaning of the symbol.

The core logic of emotional marketing is formed by these five characteristics together, from the neurological level to the socio-cultural context, from immediate response to long-term operational strategy, building a value creation framework that covers the entire process of consumer decision-making. This paradigm shift is particularly important today, when attention spans are scarce - consumers are exposed to more than 5,000 advertisements a day, and only emotional resonance can cut through the noise and enable them to establish true brand loyalty.

3.3 Emotional Marketing Strategies and Methods

As the development of marketing becomes more and more perfect, emotional marketing is one of the most effective and difficult to realize. It must combine the consumer's personal emotional differences with the company's brand needs, through emotional design, emotional packaging, emotional price and emotional service and other aspects of the strategy to achieve the company's business objectives (Ding, 2016).

3.3.1 Emotional Design

The essence of emotional design is to organically integrate specific emotional elements into the product value system through the accurate positioning of emotional touchpoints, so that consumers can naturally trigger the preset emotional linkage mechanism when using the product. For example, taking the economic phenomenon of urban youth loneliness as the object of research, the soothing product and the value of companionship are bundled in depth, and with the help of accurate emotional coding, the consumer motivation is effectively initiated.

3.3.2 Emotional Packaging

Emotional packaging is a marketing strategy that injects emotional elements into product packaging to build consumers' emotional resonance. This emotional penetration can not only be expressed in the packaging form of innovation, but also through the color language and styling symbols of this visual system to complete, the core is to stimulate the target user to produce emotional identity, and then drive consumer behavior.

3.3.3 Emotional Price

Consumer decisions with price as a key variable have an emotional leverage effect on marketing strategies. Research has found that willingness to pay can be increased by 42% through emotionally driven pricing strategies, especially in the field of high-end emotional consumer goods, where a reasonable price premium not only strengthens the status symbol of the product, but also builds a solid psychological identity by satisfying consumers' emotional projection and self-realization needs. Jellycat's success is due to the fact that the core of its product premium does not lie in the plush material itself, but in its role as an "emotional soother", the purpose is to allow consumers to be willing to pay 3.8 U.S. dollars for each gram of cotton as an emotional added value, in order to maintain the symbolic value of the brand as a tool for emotional transfer.

3.3.4 Emotional Services

Emotions are bipolar, i.e. positive and negative. Consumers react very differently to the two different types of emotions - positive and negative. Businesses aim to evoke positive emotions from consumers and strengthen them continuously. However, in the reality of marketing activities due to the lack of

understanding of emotional marketing or operational errors and often produce deviation or even contrary to expectations.

4 JELLYCAT'S MARKETING STRATEGY

4.1 Product Design and Emotional Value

Through the three-dimensional design strategy of “Sensory Touch - Symbolic Narrative - Scene Extension”, Jellycat implanted emotional values into its product genes, successfully positioning the brand not only as a toy, but also as an emotional companion that can evoke a sense of warmth, healing and companionship.

4.1.1 Classic Bonnie Rabbit: Creating a Brand Symbol

Bonnie Bunny is the brand symbol and the sales play of Jellycat. It is simple and cute design not only attracts children, but also captures the hearts of a large number of adult consumers. On social media, the bunny rabbit has become a cultural symbol, and many consumers regard it as a must-have element for taking photos, or even a symbol of the warm atmosphere of the family. This symbolic design of the brand enables Jellycat to stand out among many similar products and form a “moat” for the brand.

4.1.2 Creative Fruit and Vegetable Series: Pushing the Boundaries of Traditional Design

Jellycat is not only limited to the traditional animal dolls, but has also launched a large number of innovative fruit and vegetable dolls. These fruits and vegetables dolls not only look interesting, but also give the dolls a richer meaning, such as representing health, nature and a positive lifestyle. This innovative design strategy not only enriches the brand's product line, but also enables it to appeal to a more diverse consumer base.

4.1.3 Anthropomorphic Portrayal

Through anthropomorphic image building, Jellycat enhances the emotional connection of its products. The brand creates exclusive personas for the dolls, giving them life and personality, so that consumers can establish an emotional connection with the dolls

during the purchase and use process. For example, the brand has set up a page on its website called “Old Friends Who Do Not Want to Say Goodbye”, which includes information about retired dolls, evoking nostalgia and enhancing brand loyalty.

4.2 Social Media and Emotional Engagement

Jellycat has successfully built a culture of engagement through social media and user-generated content (UGC). Consumers are not only consumers of the brand, but also evangelists and creators of the brand. By sharing their stories and photos, consumers participate in brand building and form a strong brand community.

4.2.1 Social Media Strategy: Word-of-Mouth and Community Building

Traditional media marketing is mostly a one-way information transfer, information is more authoritative and professional, but for the majority of platform users will widen the communication distance and thus more difficult to produce a sense of empathy. Social media marketing greatly reduces the distance between the enterprise and the user, the user in this open space can create or publish content, comments, sharing, socializing, greatly improving people's participation, the enterprise in the process can also greatly increase the viscosity between the customer (Qiao, 2023).

Jellycat values the power of social media and has expanded the brand's reach by interacting with consumers and organizing online and offline events. Users do not just show off their Jellycat dolls on social media, they also take the initiative to write stories and pictures for them, and this kind of user-generated content (UGC) has turned into a powerful tool for brand promotion. Taking Xiaohongshu as a platform, the #Jellycat topic has had hundreds of millions of views and up to 500,000 notes, which has formed a strong brand influence (Liu, 2025).

4.2.2 Interactive Experience Activities

Jellycat enhances consumers' emotional engagement through time-limited experience stores and interactive activities. For example, the brand's time-limited experience store in Shanghai attracted young people from all over the country to experience and consume the product. In addition, the brand also enhanced the emotional experience of consumers

through interactive activities such as “Be careful of the thorns when eating sea cucumbers”.

4.3 Social Media and Emotional Engagement

Based on the theory of user experience elements, Jellycat pays attention to the optimization of user experience from product design, packaging and after-sales service. From product design, warmth and healing, packaging details to personalized after-sales service, Jellycat strengthens consumers' emotional connection with all-round user experience design.

4.3.1 Packaging Design: Warmth in the Details

Jellycat's gift boxes are packaged in warm colors and soft materials, allowing customers to appreciate the brand's exquisite care the moment they unwrap their gifts. In addition, the brand adopts the marketing strategy of limited edition and festival to stimulate consumers' desire to buy and collect.

4.3.2 After-sales Service: Personalized Service

Jellycat offers personalization services, such as embroidering names or special wishes on dolls, a personalization strategy that greatly enhances the added value and emotional connection of the product.

4.3.3 Interactive Rituals: Building Emotional Connections

Jellycat creates interaction rituals between users and dolls, such as the “Activation Ritual” card attached to the tag, which aims to establish a connection between users and dolls from action to emotion the moment they get the dolls (Feng, Sun, 2024). This interactive ritual not only enhances consumers' identification with the product, but also makes the dolls an integral part of their lives.

5 PROBLEM ANALYSIS

5.1 The Challenges of Emotional Marketing

5.1.1 The Dilemma of Building Emotional Empathy

Emotional resonance is at the center of emotional marketing, but it is not easy to build. Neuroscience

research has shown that effective emotional resonance requires the activation of both the mirror neuron system and the default mode network (DMN), which puts stringent demands on a brand's narrative capabilities. Brands need to understand the inner needs of their target audience in order to design goods and services that can truly move consumers' feelings. For example, Jellycat has successfully established an emotional connection with consumers through anthropomorphic product design and brand storytelling, but this connection requires constant investment and optimization to maintain.

5.1.2 Accumulation of the Risk of False Sentiment

Emotional marketing emphasizes the emotional connection between the brand and the consumer, which may lead to “emotional inflation” as it evolves into a standardized operational process: brands use too many emotional symbols, resulting in diminishing marginal benefits. In other words, if a brand conveys emotions that are not authentic or do not match the actual experience of the consumer, it may cause a crisis of trust and resentment. Jellycat uses real stories and user-generated content (UGC) to strengthen emotional resonance, but brands need to ensure their authenticity and avoid over-marketing.

6 RAISE A SUGGESTION

6.1 Precise Targeting

Brands need to identify their target audience and gain insight into their emotional needs; Jellycat has successfully captured the dividends of the “healing economy” in expanding its target market from children to adults. Through market research and user feedback, the brand has been able to pinpoint the emotional needs of its target audience and design products and services that can touch consumers' hearts.

6.2 Utilize Social Media Interaction

Social media plays an important role in emotional marketing, through social media brands can establish emotional interaction with consumers. Jellycat has successfully expanded its brand influence by combining user-generated content (UGC) and brand community building. Brands can enhance consumer emotional engagement by placing quality content,

organizing interactive activities and encouraging users to share.

6.3 Optimize Consumer Experience

Consumer experience plays an important role in emotional marketing, and brands need to convey emotions from the details of packaging design and after-sales service. Jellycat has successfully improved consumer experience with its unique packaging design, personalized customization service and the opening of offline flash stores, etc. Brands can improve consumer experience by optimizing packaging design, providing personalized customization service and opening offline flash stores. Brands can optimize packaging, provide personalized service and offline activities to enhance the emotional experience of consumers.

7 CONCLUSIONS

This study examines the Jellycat brand's emotional marketing strategy and reveals the brand's success in the context of the "healing economy." Jellycat's precise positioning has enabled it to expand its target market from the traditional children's demographic to adults, especially young people, and to capture the "healing economy" dividend. Jellycat has successfully captured the dividends of the "healing economy". Through the classic Bonnie Bunny, creative fruit and vegetable series and anthropomorphic image shaping, Jellycat has successfully conveyed the emotional values of warmth, healing and companionship to satisfy the emotional needs of consumers, which not only improves brand awareness and goodwill, but also increases consumer loyalty. On this basis, Jellycat has successfully built a participatory culture in social media interaction, user-generated content (UGC) and brand community building. Consumers are not only brand consumers, but also brand evangelists and creators. This emotional marketing strategy enhances the emotional value of the brand while expanding its impact.

The theoretical value of this study lies in expanding the boundaries of the application of emotional marketing theory, enriching the theoretical system of emotional marketing through the carrier of plush toys, and revealing the mechanism of emotional marketing in branding by deconstructing Jellycat's successful experience, especially in the context of "healing economy" and consumer upgrading. Only by grasping the demands of young consumers who are

eager to be noticed, understood and recognized, and by providing them with a stage to express their emotions and show themselves with an open, innovative and empathetic attitude, can a brand truly capture the hearts of young consumers. (Yan, 2024). The practical value of this study is to provide a framework for other brands to implement emotional marketing that can be learned from, helping brands to better satisfy consumers' emotional needs and enhance brand competitiveness.

In the future, the study of emotional marketing can be approached from the perspective of how to keep the concept of "healing" and "companionship" fresh in the minds of brands. It may be necessary to monitor the dynamics of emotional marketing strategies over time to see how they evolve over time and in different environments to meet the changing needs of the market and consumers. On this basis, it is also possible to discuss the strategies and effectiveness of emotional marketing in different cultural contexts and analyze the role of cultural differences in emotional resonance. In the European and American markets, emotional marketing strategies may need to be adjusted accordingly.

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