

From Niche to Global Icon: The Strategic Marketing Behind Labubu's Cuteness Empire

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Abstract. Products embodying traits such as small size, round shapes, vibrant colors, and irresistibly cute designs—collectively known as “Kawaii” (Japanese for “cuteness”)—can evoke warmth and companionship. Originating in Japan, this aesthetic has rapidly gained global appeal. The global proliferation of Kawaii(cuteness) culture has transformed industries from fashion to entertainment, with designer toys emerging as a rapidly expanding sector. China’s Pop Mart has revolutionized this market through innovative strategies such as blind boxes and experiential retail. Within this context, Labubu, created by Hong Kong artist Kasing Lung, has achieved meteoric globalization. Using qualitative case study analysis and data from social media, brand websites, press releases, and interviews with key stakeholders, this research explores how Labubu achieved cross-cultural resonance and became a “cuteness empire.” This study finds that Labubu’s success redefines IP (intellectual property) commercialization by centering on emotional economy, which fosters deep consumer connections, and community co-creation, which empowers fans to actively participate in the brand’s evolution. As the emotional economy continues to dominate consumer behavior, Labubu’s strategy offers a blueprint for IPs seeking to transcend borders—not through mass appeal, but through meaningful, participatory connections with global audiences.

Keywords: Labubu, art toys, strategic marketing, cultural globalization, Kawaii culture

1. Introduction

According to its financial report, Pop Mart achieved explosive overseas growth with revenue surging 375.2% YoY to 5.066 billion yuan in 2024, driven primarily by Labubu's global appeal across 25 markets [1]. Its business covers 25 countries and regions worldwide. Its hero product Labubu has become a global icon. Created by Hong Kong artist Kasing Lung, Labubu’s unique cute and monstrous image challenged traditional Kawaii norms, resonating with postmodern aesthetics. It achieved meteoric globalization. The Labubu series not only tops Pop Mart's overseas sales charts but also demonstrates rapidly spreading social popularity [2]. Despite these developments, significant gaps remain in the literature regarding the specific strategies that drive the globalization of IPs like Labubu. Existing studies focus on macro-cultural flows and industry trends, neglecting detailed analysis of marketing tactics behind individual IP globalization [3]. Moreover, current research is Japan-centric, overlooking Chinese-origin IPs [4]. This study aims to reveal the

marketing strategies that enabled Labubu's transformation into a global icon. To achieve this, both primary and secondary data sources will be utilized. Primary data will be collected through analysis of Pop Mart's official social media, brand websites, press releases, investor reports (2023-2025), and interviews with key stakeholders. Secondary data will include news articles, industry reports, fan community discussions, academic literature, and visual analysis of Labubu's designs and marketing materials. Analyzing Labubu's transition from a niche entity to a global icon offers practical insights for the commercialization of local IPs and deepens our understanding of cultural symbol dissemination, emotional economy, and cross-cultural marketing theory, providing significant academic and practical value.

2. Existing gap in IP commercialization theory

2.1. Neglect of emotional resonance over functional utility

Conventional IP commercialization models traditionally prioritize functional attributes—usability, quality, and price—over emotional engagement. This product-centric approach stems from classical marketing theories that emphasize utilitarian value. However, in the background of contemporary consumer culture, especially within the zone of designer toys and Kawaii aesthetics, emotional resonance often serves as the primary driver of purchase decisions and brand loyalty.

Labubu's success demonstrates how emotional aesthetics forge deep affective connections with audiences. Unlike traditional IPs that rely on narrative familiarity or functional utility, Labubu leverages emotional ambiguity and aesthetic novelty to engage consumers. This emotional drive not only stimulates purchase behavior, but also fosters long-term attachment, transforming consumers into active promoters and co-creators. According to relevant research, paying for emotions is one of the obvious consumption characteristics of generation Z consumers. Research shows that nearly 60% of young people are willing to pay for emotional value, more than 90% recognize its significance, and 46.8% regard it as a good medicine to relieve stress [5]. In the new media environment, emotional interaction with consumers is the main way of cultural IP marketing communication in the new era [6]. Labubu's success deconstructs utility-dominated IP commercialization models, offering a paradigm shift toward affective economics.

2.2. Balance between cross-cultural adaptation and dynamic co-creation

Existing theories exhibit significant gaps in understanding how IPs navigate cross-cultural tensions. Traditional globalization strategies typically follow a binary path: either full localization to conform to cultural norms, or adherence to standardization to maintain brand consistency. Neither approach adequately accounts for the dynamic, participatory process through which global audiences reinterpret and reshape IP meanings. Labubu demonstrates a strategy balancing core symbolic stability with cultural flexibility. While preserving its distinctive visual identity and artistic integrity, Labubu encourages local reinterpretation through collaborations, limited editions, and fan-generated content. This enables the IP to maintain cultural relevance without diminishing its original appeal.

Moreover, current theories underestimate the role of community. Traditional globalization theory, especially in the fields of branding and IP management, has long revolved around a classic binary paradox between global standardization and local adaptation. This framework forces brand managers to focus on “how a brand should output” rather than “how users will interact and co-create”. It implies an assumption that the brand is the active sender of messages, and the consumer is the passive receiver. Within this framework, community is, at best, seen as an extension of sales or

marketing channels, rather than a core asset with autonomous value creativity. Labubu's fans are not passive consumers but active participants. They contribute to the IP's storytelling through social media, fan art and collectible trading [7]. This participatory culture enhances emotional investment and extends the IP's lifecycle beyond conventional commercial cycles.

3. Labubu's cross-cultural communication mechanism

3.1. Core symbol stability

At the heart of Labubu's global appeal is its consistent and recognizable core identity [8]. Labubu's symbol system synthesizes East-West cultural hybridity, reflecting designer Kasing Lung's dual artistic influences—European fairy tales (e.g., Dutch picture books) and Eastern supernatural aesthetics. In an interview with Sina, he stated that Labubu was inspired by fairy tale picture books he read in the Netherlands during his childhood. He frankly stated that Labubu's inspiration comes from “imagination of unknown creatures”. The elf universe constructed by its album “The Monsters” has become the primitive soil for the growth of symbolic meanings. It can be seen that the designer blended European fantasy literature with Eastern supernatural aesthetics, which also gave Labubu a contradictory yet unified visual symbol. Key elements such as Labubu's fanged smile, large eyes, and vibrant color schemes remain unchanged regardless of geographic or cultural context. This stability acts as an anchor, providing a sense of authenticity and continuity that fosters trust and emotional attachment among global consumers. In semiotic terms, Labubu functions as a stable signifier whose core meaning does not dilute even as it travels across cultures. This is a critical factor in building a timeless and borderless IP.

3.2. Re-coding under different cultural backgrounds

Originating in East Asia, Labubu's symbolic meaning was initially deeply rooted in the unique cultural context of the East Asian market. Amidst the escalating social pressures faced by young people in China, the category of cute toys has emerged as a significant “healing economy” phenomenon, gaining widespread market favor. Within the high-stress urban landscape, Labubu's innocently peculiar charm has provided a much-needed emotional release for the younger generation [9]. On the domestic social platform Xiaohongshu, fans who received high likes commented that it was “so strange that it makes people feel at ease”, reflecting the resistance of Generation Z to standardized aesthetics.

The differential interpretation of the same IP symbol in different cultural contexts is an inevitable phenomenon in cross-cultural communication. This phenomenon originates from the consumer's “cultural lens”—the cognitive framework formed within their own cultural background [10,11]. Taking the fangs in Labubu's image as an example, the interpretation of European and American audiences is deeply influenced by punk culture, pointing the “fangs” towards the rebellious coolness of anti-mainstream. This interpretation is in line with the cultural identity of European and American youth towards individual resistance and diverse expression. The interpretation of East Asian audiences is embedded in the survival logic of collectivism. Labubu's fangs are often paired with round eyes and soft fur, forming a contrast of external hardness and internal softness, which is in line with the empathy of East Asian society towards the surface toughness but actual softness.

3.3. Community-driven meaning making

Beyond corporate-led adaptation, Labubu's cross-cultural meaning is largely co-created by its global community. Fans participate in interpreting, narrating, and expanding the Labubu universe through social media. Platforms like Xiaohongshu, Instagram, and Reddit serve as spaces where fans assign personal and collective meanings to Labubu, which often go beyond the official narrative [12]. The democratization of design has broken the monopoly of traditional brands on the visual form of symbols, and transferred part of the modification right and regeneration right of symbols to the fan community, making symbols the carrier of fans' will. For example, European and American fans are keen to paste rhinestones, false eyelashes and do hip raising surgery on Labubu according to their own aesthetics, while Chinese fans are keen to wear various traditional costumes for Labubu, such as Miao silver jewelry and the Phoenix crown. In this process, the symbol ceases to be a one-way cultural product of the brand and instead becomes a result of the community's coding of regional culture into the symbol, thereby binding the symbol to local culture.

The vitality of the symbol also lies in its narrative system. By opening up the right to create stories, Pop Mart makes fans become co-writers of symbolic meanings and builds a new symbiotic meaning network. On platforms like "Labubu Fandom," fans spontaneously compile role branches and add world-building settings. For example, fans have introduced "interstellar adventure" and "ancient magic" branches, allowing the original single cartoon image to derive cross-dimensional meanings. This creates a symbiotic structure where the brand's main narrative coexists with fan sub-narratives.

4. Labubu's global marketing strategy mode

4.1. Omnichannel experience design (online and offline)

Labubu's omnichannel strategy integrates online digital interaction and offline experiential immersion. It addresses the fragmentation of traditional single-channel marketing and aligns with the "experience-driven consumption" trend in the global Kawaii economy. Online channels serve as the primary platform for Labubu to reach global audiences at scale, focusing on content communication to stimulate emotional connection, and transaction efficiency to lower purchase barriers. Pop Mart leverages user-generated content (UGC) to amplify its content reach. In 2024, Labubu launched the "My Labubu Story" campaign on TikTok, encouraging users to share short videos featuring Labubu in their daily lives. The campaign garnered 13.2 billion views and significantly increased online product searches.

Pop Mart's official global website and APP offer exclusive services for Labubu fans, such as digital collection cards and community forums. Data shows that users who register on the official APP have a higher repurchase rate than those who purchase via third-party platforms, as the APP enables personalized recommendations based on browsing history.

Offline channels compensate for the "emotional distance" of online interactions by providing tangible experiences and community gathering spaces, which is critical for art toys, a category dependent on sensory and collectible value. As of 2024, Pop Mart has opened 187 offline stores in 25 countries, with Labubu as the core display IP in 85% of stores. These stores maintain Labubu's core symbol stability while attracting offline consumers through blind boxes. Labubu also uses pop-up stores to test emerging markets and create scarcity. In 2024, a 30-day Labubu pop-up store in New York's World Trade Center Mall achieved \$820,000 in sales, with limited-edition Punk Labubu

[13]. This omnichannel strategy not only enhances brand experience but also fosters deeper user loyalty by providing a seamless transition between online and offline interactions.

4.2. Data driven localization model

Labubu's localization strategy avoids the pitfalls of traditional IP approaches—whether overly rigid or excessively localized—by balancing the stability of core symbols with cultural adaptability through a data feedback loop. This ensures authenticity while maintaining scalability. Pop Mart collects data from internal sales systems, third-party platforms, and social media monitoring tools to understand regional demand. Consumer behavior data includes transaction information from e-commerce platforms and physical stores, such as product preferences, price sensitivity, and repurchase frequency. By collaborating with local research institutions, Pop Mart analyzes regional cultural symbols and aesthetic trends. Additionally, leveraging social media monitoring tools like Brandwatch, Pop Mart tracks cross-platform mentions, sentiment, and reviews.

Pop Mart employs three core metrics to validate localization effectiveness and ensure real-time strategy iteration. First is regional sales growth and revenue contribution, measuring income impact. In 2024, Labubu's European revenue surged 420% year-over-year (compared to Pop Mart's overall overseas market growth of 375.2%), confirming the efficacy of localized products and pricing strategies. Second is local community retention rate, gauging user stickiness. Pop Mart prioritizes community operations, with its WeChat private domain membership exceeding 10 million by December 2024. In the first half of 2021, members contributed over 90% of sales, with a 49% repurchase rate. The brand employs regional group management, offering periodic blind boxes and coupons to encourage community participation. Community members can assist each other, share fashion insights, and resell secondhand items, fostering an active fashion community that significantly boosts user retention. Finally, through social media mentions and search volume, Pop Mart monitors its brand penetration across regions, providing data to refine localized strategies.

5. How can emotional economy become a business driver

The emotional economy represents a paradigm shift in consumer behavior, where value is derived not from utilitarian function but from affective engagement, symbolic meaning, and community belonging. Labubu's success exemplifies how emotional connections can be systematically harnessed to drive commercial success [14].

5.1. Symbolic reproduction of community economy

The symbolic reproduction of community economy is the foundation for emotional economy to drive business, as it relies on the construction of shared symbolic meanings to gather user groups and form stable emotional connections.

Enterprises can create unique symbolic carriers, such as brand stories, cultural symbols, or characteristic rituals, that resonate with users' emotions. For example, a tea brand may take "traditional craftsmanship inheritance" as a symbolic core, through storytelling about tea makers' persistence and the cultural connotation of tea drinking, to arouse users' recognition of traditional culture and emotional identity with the brand. Moreover, users with similar emotional needs or values can gather to form a community. Within the community, interactions such as experience exchange and value recognition strengthen the symbolic consensus. The symbolic meanings in the community are not static, though; they are continuously reproduced and enriched through user

participation. Users may spontaneously create derivative content based on the original symbols, which further enhances the community's uniqueness and emotional stickiness, while also laying a foundation of sustainable emotional value for subsequent commercial monetization [15]. This dynamic process not only enhances the community's uniqueness and emotional stickiness but also creates a more engaged and loyal customer base, which is crucial for long-term business success.

5.2. Commercial monetization of symbolic value

The commercial monetization of symbolic value is the key to transforming emotional connections into tangible business benefits. It requires enterprises to dig deep into the commercial potential of symbolic meanings without damaging users' emotional experience. Leveraging the symbolic meanings recognized by the community, enterprises can develop derivative products and services imbued with emotional value. Pop Mart's DIMOO "Protecting the Emotional World with Cloud Baby" series is a typical example. In 2024, the blind boxes of this series increased by 35% year-on-year on the Tmall platform, with a repurchase rate of 42%. The topic #DIMOO, initiated on Xiaohongshu, has surpassed 1.8 million views in its first month, with frequent user comments including "release emotions" "troubles" and "happiness".

6. Conclusion

Labubu's journey from niche toy to global icon redefines IP commercialization by centering emotional economy, community co-creation, and adaptive cultural communication. It addresses gaps in traditional theory by proving that niche appeal, emotional resonance, and dynamic glocalization can drive scalable success. As the emotional economy continues to dominate consumer behavior, Labubu's strategy offers a blueprint for IP seeking to transcend borders—not through mass appeal, but through meaningful, participatory connections with global audiences. This framework highlights how its success is not an accident but a result of strategic alignment between emotional insight, cultural adaptability, and community engagement—setting a new standard for global IP marketing. Although this study strives for depth and comprehensiveness, there are still limitations, which also point the way for future research. This research centers exclusively on Labubu, without comparing its strategy to other niche-to-global IPs (e.g., Molly, Bearbrick). This limits the generalizability of conclusions: Are Labubu's success factors unique, or do they reflect broader patterns in IP commercialization? To solve this case, comparative case studies can be used to analyze other successful niche-to-global IPs alongside Labubu to distil common principles and divergent tactics, enhancing the generalizability of the theoretical framework.

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