

The Business of Being Barbie. A Case Study of an Ambidextrous Intellectual Property Protection Strategy*

Abstract

This paper examines Mattel’s intellectual property strategy for Barbie through a dual SWOT framework, demonstrating how the brand operates simultaneously as both a defensive fortress and an offensive growth engine. Drawing on legal records, financial disclosures and market data, the study demonstrates that Barbie’s intellectual property portfolio exemplifies an “ambidextrous strategy” – one that protects brand integrity through rigorous enforcement while expanding across film, fashion, gaming and digital ecosystems through strategic licensing and partnerships. The weighted SWOT analysis shows that Barbie’s defensive strengths significantly outweigh external threats, thereby creating a formidable enforcement infrastructure capable of countering counterfeiters, AI-driven look-alikes and jurisdictional challenges. On the

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offensive side, Barbie's monetization capabilities align closely with expansion opportunities, enabling the brand to scale into new markets while managing exposure risks through curated growth. These parallel strategies are not mutually exclusive but symbiotic: enforcement actions against counterfeiters preserve consumer trust, which in turn enables luxury collaborations, while trade dress protection enhances the appeal of IP extensions such as feature films and video games. The paper contributes to intellectual property scholarship by demonstrating that SWOT analysis can serve as a practical framework for shaping and assessing IP strategy and to business strategy literature by illustrating how established brands maintain market dominance through calibrated, complementary defensive and offensive IP management in competitive, fast-changing industries.

KEYWORDS: intellectual property strategy, Barbie, Mattel, ambidextrous strategy, SWOT analysis, brand licensing, defensive IP strategy, offensive IP strategy

1 | Introduction

Few toys (product brands) are as instantly recognizable or as legally fortified as Barbie, the flagship doll of Mattel, Inc. (corporate brand).^[1] The story of Barbie's legal life is not merely one of a doll, but of a carefully managed IP empire that has enabled continuous innovation, extensive

¹ S. Prakash Sethi, Emre A. Veral, H. Jack Shapiro, Olga Emelianova, "Mattel, Inc.: Global Manufacturing Principles (GMP) – A Life-Cycle Analysis of a Company-Based Code of Conduct in the Toy Industry," *Journal of Business Ethics* 99, no. 4 (2011): 483-517; David Barboza, Louise Story, "Toy Making in China, Mattel's Way," *New York Times*, 26 July 2007, http://www.nytimes.com/2007/07/26/business/26toy.html?_r=1; S. Prakash Sethi, *Multinational Corporations and the Impact of Public Advocacy on Corporate Strategy: Nestle and the Infant Formula Controversy* (Boston: Kluwer Academic Publishers, 1994); Datis Khajeheian, "Market Analysis, Strategy Diagnosis and Opportunity Recognition in Toy Industry," *International Journal of Entrepreneurship and Small Business* 33, no. 2 (2018): 220-240; Margaret Walsh, "Plush Endeavors: An Analysis of the Modern American Soft-Toy Industry," *Business History Review* 66, no. 4 (1992): 637-670; K.P. Sunny, Rajesh Sund, "Productivity & Competitiveness of Indian Toy Industry: Prospects & Challenges," *Productivity* 55, no. 1 (2014); Amanda Lowerre O'Donnell, Jacqueline Thompson, "Toy Meets World: IP Strategies for the Toy Industry," *Landslide* 13, (2020): 5.

commercialization and, at times, offered cautionary lessons in the limits of IP enforcement.^[2]

For over six decades since Barbie's 1959 debut, Mattel has employed a rigorous multifaceted Intellectual Property Strategy (IPS) to protect and commercialize the Barbie brand on a global scale.^[3] Mattel explicitly positions itself as an "IP-driven" toy company,^[4] leveraging a portfolio of iconic product brands (led by Barbie) and expanding those assets into content, consumer products, digital media, and live experiences.^[5]

This paper begins with a general SWOT analysis of Mattel, examining the company's position in the global toy and entertainment market – its strengths, financial footing and the pressures it faces in a rapidly evolving industry. The focus then shifts to Barbie, where a SWOT framework is used to analyze the brand's intellectual property portfolio in a twofold manner. One IP-SWOT is developed for *offensive strategy* and another for *defensive strategy*. This approach demonstrates how Mattel has both expanded and defended Barbie through a combination of bold initiatives – such as licensing, litigation and digital ventures – and protective measures, including brand enforcement and cultural adaptation. By bifurcating the analysis, the paper acknowledges that *defensive and offensive IP strategies coexist* rather than compete (cf. ambidextrous strategy; "sword and shield" strategy).^[6]

The study draws on two categories of sources: legal records, including court rulings, trademark and patent filings, expert commentary and business materials, including Mattel's financial statements, SEC filings, industry reports and market data. Together, these sources provide a comprehensive picture of how Mattel manages Barbie not merely as a toy, but as a complex legal and commercial asset.

² Orly Lobel, *You Don't Own Me: How Mattel V. MGA Entertainment Exposed Barbie's Dark Side* (2017).

³ M.G. Lord, *Forever Barbie: The Unauthorized Biography of a Real Doll* (Liveright Publishing, 2024); Mary F. Rogers, *Barbie Culture* (Thousand Oaks: Sage, 1999); Miriam Forman-Brunell, "Barbie in 'LIFE': The Life of Barbie," *The Journal of the History of Childhood and Youth* 2, no. 3 (2009): 303-311; Kristin Noelle Weissman, *Barbie: The Icon, the Image, the Ideal: An Analytical Interpretation of the Barbie Doll in Popular Culture* (Boca Raton: Universal-Publishers, 1999)

⁴ Mattel, Inc., *Annual Report 2025* (Form 10-K), U.S. Securities and Exchange Commission, filed February 25, 2025, accessed October 15, 2025, <https://d18rnop25nwr6d.cloudfront.net/CIK-0000063276/9dbe7a03-5260-4d8f-a033-881e00319f9f.pdf>, p. 4.

⁵ *Ibidem*.

⁶ M.Jankowska, *Legal Warriors. Competing Through Intellectual Property – A Typology of 100 Strategies with Implementation*, Katowice, 2026.

Most importantly, the paper demonstrates that SWOT analysis is not merely a business planning tool but also a practical framework for shaping and assessing intellectual property strategy.

2 | Toy Industry

The global toy industry (valued at USD 107.4 billion) is highly competitive, relying on innovation, marketing and entertainment to drive sales.^[7] Companies compete through “quality, play value, brands and price.”^[8] However, powerful retailers limit pricing flexibility, while short product life-cycles and unpredictable “hit” toy products create revenue volatility.^[9] Success requires anticipating trends in popular culture, film and technology.

The global toy and game industry is characterized by a paradox: technological stasis in product design alongside volatility in consumer markets.^[10] Patent activity remains limited, rendering radical breakthroughs unlikely. For incumbents such as Mattel, this dynamic is both stabilizing and constraining. Core franchises – Barbie, the plastic royalty; Hot Wheels, icons of miniature speed; and Fisher-Price, the perennial nursery companion – operate in a landscape where sudden obsolescence is improbable. Yet when innovations do emerge, they tend to cluster in niches such as augmented

⁷ Aline Darc Piculo dos Santos, Galdenoro Botura Junior Fausto Medola, “Innovation in the Design of Inclusive Toys: Development and Evaluation of a Prototype for Visually Impaired Children,” *Strategic Design Research Journal* 12, no. 3 (2019): 338-360; Aline Darc Piculo dos Santos, Fausto Medola, “O Design de Brinquedos para Crianças com Deficiência Visual [The Design of Toys for Visually Impaired Children],” in *Proceedings of 3rd Simpósio Interdesigners* (Bauru: UNESP, 2016): 232-247.

⁸ Mattel, Inc., *Annual Report 2025*.

⁹ Jason Cincotta, Cathryn Camacho, Drew Olian, “Strategic Report for Mattel, Inc.” Harkness Consulting. *Innovation through Collaboration (2007)*, accessed August 26, 2023, <http://economics-files.pomona.edu/jlikens/seniorseminars/harknessconsulting2008/pdfs/mattel.pdf>; cf. Orly Lobel, *You Don't Own Me: How Mattel V. MGA Entertainment Exposed Barbie's Dark Side*.

¹⁰ “Toy and Game Retailing in Australia,” IBISWorld Industry Report (2023), accessed January 15, 2025 through Deakin Online Library; Datis Khajeheian, “Market Analysis, Strategy Diagnosis and Opportunity Recognition in Toy Industry”; Margaret Walsh, “Plush Endeavors: An Analysis of the Modern American Soft-Toy Industry”; K.P. Sunny, Rajesh Sund, “Productivity & Competitiveness of Indian Toy Industry: Prospects & Challenges.”

reality, robotics, or STEM-based learning, where their disruptive effect is magnified, akin to an unexpected shift within an otherwise predictable franchise.

Fig. 1. IBISWorld Industry Report (2023).^[11]

Technology & Systems Potential Disruptive Innovation: Factors Driving Threat of Change

| Level | Factor | Disruptive Effect | Description |
|------------|--------------------------|-------------------|--|
| ✔ Very Low | Rate of Innovation | Very Unlikely | A ranked measure for the number of patents assigned to an industry. A faster rate of new patent additions to the industry increases the likelihood of a disruptive innovation occurring. |
| ⚠ High | Innovation Concentration | Likely | A measure for the mix of patent classes assigned to the industry. A greater concentration of patents in one area increases the likelihood of technological disruption of incumbent operators. |
| ⊖ Medium | Ease of Entry | Potential | A qualitative measure of barriers to entry. Fewer barriers to entry increases the likelihood that new entrants can disrupt incumbents by putting new technologies to use. |
| ✔ Very Low | Rate of Entry | Very Unlikely | Annualized growth in the number of enterprises in the industry, ranked against all other industries. A greater intensity of companies entering an industry increases the pool of potential disruptors. |
| ✔ Very Low | Market Concentration | Very Unlikely | A ranked measure of the largest core market for the industry. Concentrated core markets present a low-end market or new market entry point for disruptive technologies to capture market share. |

Ultimately, IPS constitutes the primary field of competition. Market entry barriers in toy manufacturing are only moderately restrictive; however, the decisive barrier lies in IP ownership. The capacity to control characters, universes and franchises transforms a toy from a physical object into an enduring ecosystem. For Mattel, the brand portfolios of Barbie or Hot Wheels are not merely trademarks; they are cultural assets deployed across films, games, licensing and merchandising.^[12] This integration of IP ensures that incremental product updates resonate beyond the toy aisle, extending into cultural memory and consumer identity. The rate of new

¹¹ “Toy and Game Retailing in Australia,” IBISWorld Industry Report (2023), accessed January 15, 2025 through Deakin Online Library.

¹² Kristin Noelle Weissman, *Barbie: The Icon, the Image, the Ideal: An Analytical Interpretation of the Barbie Doll in Popular Culture*.

market entrants remains low and market concentration remains high. This creates a fortress-like structure around established corporate giants, albeit not an impenetrable one. Startups leveraging novel characters or digital communities occasionally penetrate this structure, posing challenges not in traditional toy aisles but in the cultural spaces where new IP captures attention and imagination.

It is, in fact, the management of intellectual property rather than toy design that constitutes the genuine site of disruption. As Teece's framework of dynamic capabilities suggests, long-term competitiveness lies not in static assets but in the capacity to continuously reconfigure them.^[13] For Mattel, survival and growth are increasingly tied not to the continual reinvention of Barbie or Hot Wheels as objects, but to their cultivation as transmedia ecosystems – comprising narratives, images and experiences that extend across film, television, games and merchandise. The toy itself is an *anchor*, while the surrounding IPS generates the *gravitational pull*.

Yet, despite technological conservatism in design, the industry remains volatile. Consumer tastes oscillate in response to media cycles, revivals and viral trends, while broader economic fluctuations reverberate through sales. In such a context, Mattel's strategic resilience rests less on radical invention than on the management of IP portfolios, the cultivation of cross-generational loyalty and ensuring that Barbie's next cinematic appearance or Hot Wheels' digital iteration is as defensible in law as it is compelling in cultural terms.

3 | One Mattel Philosophy

Founded in 1945, Mattel is the world's fourth-largest toy manufacturer, operating in 35 countries and employing 32,000 people. Best known for Barbie – its main product and “one of the most long-lived designed products of all time” – Mattel manages a diverse portfolio under its “One Mattel Philosophy” through three business segments.^[14]

¹³ David J. Teece, Gary Pisano, Amy Shuen, “Dynamic Capabilities and Strategic Management,” *Strategic Management Journal* 18, no. 7 (1997): 509-533.

¹⁴ Mattel, Inc., *Annual Report 2025* (Form 10-K).

Under its one Mattel umbrella brand (“One Mattel Philosophy”),^[15] the company maintains three distinct business segments, each comprising subsidiary brands, joint ventures, and licensing arrangements.

Table 1. Mattel’s portfolio segments.^[16]

| Segment | Core brands, joint ventures, or licensing agreements | |
|--|---|--|
| <u>Mattel Girls & Boys Brands:</u> | <ul style="list-style-type: none"> • Barbie • Polly Pocket! • Hot Wheels • Matchbox • Tyco R/C Vehicles • Nickelodeon | <ul style="list-style-type: none"> • Disney Classics • Harry Potter • Batman • MegaMan • Yu Gi Oh! • MegaMan |
| <u>Fisher-Price Brands:</u> | <ul style="list-style-type: none"> • Little People • Power Wheels • BabyGear • See ‘N Say • View-Master | <ul style="list-style-type: none"> • InteractTV • Barney • Winnie the Pooh • Dora the Explorer • Sesame Street |
| <u>American Girl Brands:</u> | <ul style="list-style-type: none"> • American Girl • Bitty Baby • Angelina Ballerina | <ul style="list-style-type: none"> • Hopscotch Hill School • Just Like You |

Mattel offers toys and action figures based on films, cartoons and computer game characters, e.g., Minecraft, puzzles, educational toys and games (UNO).

¹⁵ Marlena Jankowska, “Threads and Tech: From Runway Sass to Smart Class – Pierre Bourdieu’s Concept of Capital Revisited,” *Prawo i Więź* 54, no. 1 (2025), <https://doi.org/10.36128/PRIW.VI54.1189>; Marlena Jankowska i Mirosław Pawełczyk, “Intellectual Property Philosophies and Brand Strategies: Converging Theories and Integrative Approaches,” *Prawo i Więź* 52, no. 5 (2024), <https://doi.org/10.36128/PRIW.VI52.1004>; Marlena Jankowska i Mirosław Pawełczyk, “Intellectual Property Law: Philosophical Foundations, Theoretical Frameworks, and Cross-Pollination,” *Prawo i Więź* 47, no. 4 (2023), <https://doi.org/10.36128/PRIW.VI47.823>; Marlena Jankowska, Mirosław Pawełczyk and Ewelina Badura, “Enabling Society 5.0 through COVID-19 Digital Transformation, New Data Ecosystems, and Sustainability: Post-pandemic Legal Reflections,” *Prawo i Więź* 44, no. 1 (2023), <https://doi.org/10.36128/priw.vi44.603>.

¹⁶ Jason Cincotta, Cathryn Camacho, Drew Olian, “Strategic Report...

4 | Mattel's IPS

Mattel often describes itself as an *IP-driven company*; however, this positioning was not achieved overnight. Rather, it emerged from years of intense competition and, at times, adverse courtroom outcomes^[17] that demonstrated how intellectual property may function both as a sword and a shield.

Figure 2. The New Yorker on Mattel's IP strategy.^[18]

THE NEW YORKER

When the Israeli-born businessman Ynon Kreiz became the head of Mattel, in 2018, he was its fourth C.E.O. in four years. Toys R Us had recently gone bankrupt, causing a slump in sales; Kreiz's predecessor had resigned after Mattel suffered a loss of three hundred million dollars. Kreiz, whose résumé includes a stint at Fox Kids Europe, saw an opportunity for growth. Mattel, he argued, had a children's-entertainment catalogue "second only to Disney." Just as Marvel had gone from ailing comic-book publisher to Hollywood behemoth, the toymaker could leverage its intellectual property at the multiplex. Kreiz told me, "My thesis was that we needed to transition from being a toy-manufacturing company, making items, to an I.P. company, managing franchises."

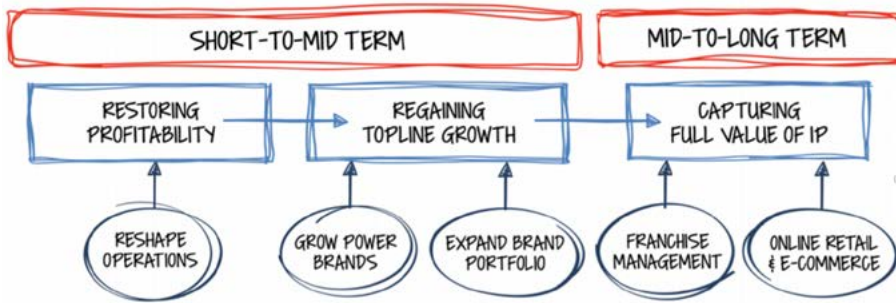
¹⁷ *Mattel, Inc. v. MGA Entertainment, Inc.*, 616 F.3d 904 (9th Cir. 2010); *Mattel, Inc. v. MCA Records, Inc.*, 296 F.3d 894 (9th Cir. 2002); *Mattel, Inc. v. MCA Records, Inc.*, 28 F. App'x 713 (9th Cir. 2002); *Mattel, Inc. v. Walking Mountain Prods.*, 353 F.3d 792 (9th Cir. 2003); *Mattel, Inc. v. Adventure Apparel*, 2001 WL 286728 (S.D.N.Y. 2001); *Mattel, Inc. v. Global China Networks*, 2001 WL 1634716 (S.D.N.Y. 2001); *Mattel, Inc. v. 99¢ Only Stores*, 2001 WL 984673 (C.D. Cal. 2001); *Mattel, Inc. v. Jcom, Inc.*, 48 U.S.P.Q.2d 1467 (S.D.N.Y. 1998); *Mattel, Inc. v. Pitt*, 229 F. Supp. 2d 315 (S.D.N.Y. 2002); *Mattel, Inc. v. Radio City Entertainment*, 210 F. Supp. 2d 154 (S.D.N.Y. 2002).

¹⁸ Alex Barasch, "After 'Barbie': Mattel Is Raiding Its Entire Toybox," *New Yorker*, July 2, 2023, <https://www.newyorker.com/magazine/2023/07/10/after-Barbie-mattel-is-raiding-its-entire-toybox>, accessed: October 21, 2025.

In 2022 Mattel was ranked no. 23 on Fast Company's list of the 100 Best Workplaces for Innovators recognizing the company's commitment to innovation.^[19] Mattel pursues two principal strategic directions:

1. accelerating top-line growth through the scaling of its portfolio, growing franchise brands, advancing e-commerce and direct-to-consumer business and continuing to optimize operations;
2. expanding its entertainment offering to capture the full value of Mattel's IP across highly accretive business verticals, including content, consumer products and digital experiences.^[20]

Figure 3. Mattel Strategy.^[21]



Mattel was an early innovator, being the first company to advertise its products back in the 1950s.^[22] The recent *Barbie* film has given the traditional children's toy a much-needed boost in good branding and increased popularity.^[23]

¹⁹ Jay Woodruff, "One Hundred Best Workplaces for Innovators," *Fast Company* (2022): 32.

²⁰ Mattel, Inc., *Annual Report 2025* (Form 10-K).

²¹ Mattel, Inc., *Annual Report 2025* (Form 10-K).

²² Cynthia Littleton, "The Joy Factory: How Mattel Keeps Its Enduring Brands Present in Pop Culture," *Variety*, March 6, 2025, <https://variety.com/2025/biz/news/mattel-brands-pop-culture-80-anniversary-1236328516/>; Orly Lobel, *You Don't Own Me: How Mattel V. MGA Entertainment Exposed Barbie's Dark Side*.

²³ Stonefield, C. (10 August 2023). Unravelling Mattel's Innovative Journey to Barbie's Unicorn Magic, *Axis Innovation*. <https://axisinnov.medium.com/unravelling-mattels-innovative-journey-to-Barbie-s-unicorn-magic-53dd462e9555>.

5 | Maxi-Mini Strategy Based on the General Mattel Corporate Brand SWOT Framework^{RGF}

Table 2. SWOT Matrix – Mattel (with Weighted Values, Scale & Scores).^[24]

| Strengths = 4.57 | | Weaknesses = 3.56 | |
|-------------------------|--|--------------------------|--|
| Expertise | | Resources | |
| 1. | Experience (78 years) (0.12; 5) | 1. | Dependence on limited customers (targets kids) (0.06; 3) |
| 2. | Diverse brand portfolio (0.08; 5) | 2. | Financial performance (0.10; 4) |
| 3. | Prominent brand portfolio (0.08; 5) | 3. | Reckless M&A strategy* (0.12; 3) |
| 4. | High brand recall (0.05; 4) | 4. | Limited popularity of Barbie – hence new versions (0.13; 4) |
| 5. | Employs talents (0.04; 5) | 5. | Hindered market penetration due to cultural differences* (0.06; 3) |
| 6. | Presence in film production and digital games (0.04; 5) | | |
| Market | | Market | |
| 7. | Snazzy location in CA (0.04; 4) | 6. | Concentrated base of wholesale customers (0.09; 4) |
| 8. | Strategic initiatives (0.05; 3) | Service | |
| 9. | Acquisitions strengthened the brand image and scope of products* (e.g. UNO, American Girl) (0.03; 4) | 7. | Large workforce (0.09; 4) |
| Capabilities | | Ethic & Law | |
| 10. | Global distribution network (0.07; 5) | 8. | Toxic toys scandal and legal issues (0.15; 4) |
| 11. | Manufacturing network (0.08; 5) | 9. | Product imitations lead to loss of revenue (0.20; 3) |
| 12. | Strong financial position (0.04; 4) | | |
| 13. | Strong partnerships, e.g. Microsoft, Disney (0.08; 5) | | |
| 14. | Strong presence in 40 countries (0.03; 3) | | |
| 15. | Strong omnipresence (0.06; 5) | | |
| 16. | Sells in 150 countries (0.05; 4) | | |
| 17. | Cost saving programs: improved efficiency in offshoring and outsourcing (0.03; 5) | | |

²⁴ The presented SWOT analysis—both in this general Corporate Brand SWOT and in the following Barbie Product Brand SWOTs—adopts a consistent, multi-layered methodological model. All SWOT matrices are constructed using a weighted evaluation framework, in which each factor is assigned three parameters: “Weight,”

| Opportunities = 4.69 | | Threats = 3.86 | |
|--|--|----------------|---|
| Technology | | Market | |
| 1. | Research and innovation (0.08; 4) | 1. | Aggressive competitor expansion (0.10; 5) |
| 2. | Advanced technologies for toy segment (0.12; 5) | 2. | Moderate barriers of entrance (0.08; 3) |
| 3. | Changing technology induces demand (0.10; 5) | 3. | Labor-intensive and not capital-intensive character of the sector (0.08; 3) |
| Market | | 4. | Inflation and unfavorable trade policies (0.07; 3) |
| 4. | Global market (0.10; 5) | 5. | Foreign exchange risks (weak USD) (0.10; 4) |
| 5. | Online retail market (0.13; 5) | 6. | Governmental regulations (0.05; 3) |
| 6. | Manufacturing plants in developing countries (0.13; 4) | Ethics | |
| Capabilities | | 7. | Ethical obligations (0.08; 3) |
| 7. | Potential of tapping into comics and movie franchise (0.11; 5) | 8. | Higher expectations of informed clients re: kids safety (0.10; 5) |
| 8. | Potential of tapping into video games & online games (0.13; 5) | Clients | |
| Trends | | 9. | Kids' changing expectations (0.12; 4) |
| 9. | Growing demand for toys (0.10; 4) | 10. | Changing trends and substitute activities (0.10; 3) |
| * the same factor can be both, a strength and a weakness | | 11. | Product imitation (0.12; 5) |

reflecting its relative importance; “Scale,” indicating its assessed performance or impact; and “Weighted Value,” calculated as their product. This approach enables a semi-quantitative ranking of factors and facilitates comparative interpretation across cases. Importantly, the allocation of weights and scores is inherently judgment-based and rests on expert evaluation. Such discretion is not a methodological flaw but rather a defining feature of SWOT analysis as applied in management studies. It reflects the epistemological openness of business analysis, where interpretative flexibility and heuristic reasoning are essential for capturing complex and dynamic market realities. Accordingly, the methodology embraces a degree of analytical subjectivity, enabling the integration of qualitative insights, industry knowledge, and strategic foresight. This stands in contrast to more rigid, normatively constrained methods—such as those typical of legal analysis—thereby allowing for a more adaptive and innovation-sensitive understanding of competitive positioning.

Figure 3. A Heatmap for the Mattel general SWOT.

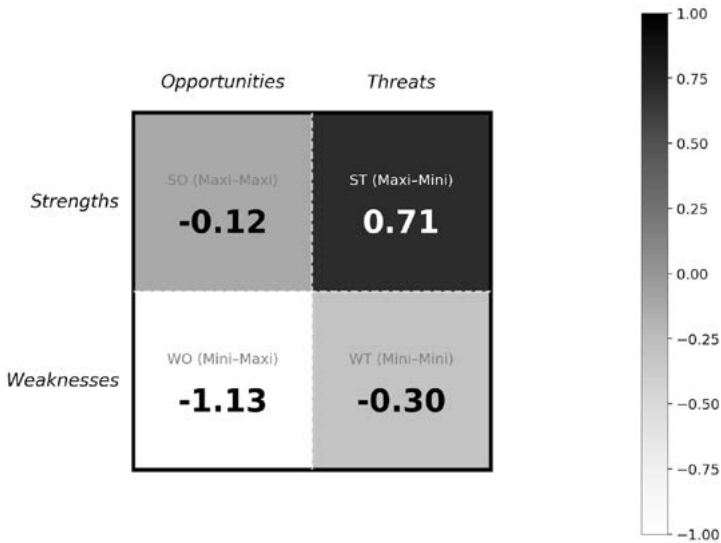


Table 3. Mattel TOWS Matrix (Weighted Scores).

| Strategy | Formula | Score | Interpretation |
|----------------|--|-------|---|
| SO (Maxi-Maxi) | Strengths (4.57) - Opportunities (4.69) | -0.12 | Slight gap: opportunities outweigh strengths. Expansion possible but requires investment to catch up with fast-changing tech/markets. |
| WO (Mini-Maxi) | Weaknesses (3.56) - Opportunities (4.69) | -1.13 | Weaknesses heavily overshadowed by opportunities. A “repair first, expand later” posture - high risk if overextended. |
| ST (Maxi-Mini) | Strengths (4.57) - Threats (3.86) | +0.71 | Strong defensive fit: Mattel’s assets (brands, global reach, partnerships) outmatch current threats. Best stability option. |
| WT (Mini-Mini) | Weaknesses (3.56) - Threats (3.86) | -0.30 | Vulnerabilities slightly greater than threats. This is the “avoid & retrench” quadrant. Weakest option. |

The maxi-mini score of +0.71 indicates that Mattel’s principal advantage lies in its ability to transform its strongest assets into safeguards against outside pressures. The company has learned that the safest way to confront competitors such as Hasbro and LEGO is not through direct rivalry, but through the cultivation of strategic alliances that are difficult to ignore. Its long-standing partnership with Disney has provided Mattel with access to

franchises such as *Frozen*, *Toy Story*, and *Cars*^[25] – film-based tie-ins that reliably generate toy sales whenever a blockbuster reaches theatres. The partnership with Warner Bros^[26] went even further: the *Barbie* film (2023) was not only a box-office success but also a cultural phenomenon that extended into fashion, music and consumer products. Similarly, Mattel’s collaboration with Microsoft around *Minecraft* toy sets and Xbox promotions shows how the company integrates its products into children’s digital lives rather than being replaced by them.^[27] These alliances function as more than contractual arrangements; they are shields, embedding Mattel’s toys in the worlds that children already love and making it more difficult for rivals to displace them.

Beyond strategic alliances, Mattel has mastered the practice of incremental innovation – small but steady upgrades that keep old favorites alive.^[28] Examples include Hot Wheels AR tracks, where allow children to project their cars into virtual races on mobile devices;^[29] *UNO Flip* and *UNO*

²⁵ Jennifer Maas, “Mattel Wins Back Disney Princess and ‘Frozen’ Toys Licensing Deal,” *Variety*, January 26, 2022, <https://variety.com/2022/film/news/mattel-disney-princess-frozen-toy-deal-hasbro-1235163887/>; Paul R. La Monica, “Disney Princess Toys, and Frozen’s Elsa and Anna, Are Coming Back to Mattel,” *CNN Business*, January 26, 2022, <https://www.cnn.com/2022/01/26/investing/disney-princess-frozen-toys-mattel-hasbro/index.html>.

²⁶ Casey McDonald, “Mattel Renews Licensing Partnership with Warner Bros. Discovery Global Consumer Products,” *Business Wire*, July 25, 2023, <https://www.businesswire.com/news/home/20230725270832/en/Mattel-Renews-Licensing-Partnership-with-Warner-Bros.-Discovery-Global-Consumer-Products>; Niki Kazakos, “Mattel and Warner Bros. Discovery Global Consumer Products Announce Multi-Year Licensing Partnership for DC Characters and Stories,” *Business Wire*, February 27, 2025, <https://www.businesswire.com/news/home/20250227553324/en/Mattel-and-Warner-Bros.-Discovery-Global-Consumer-Products-Announce-Multi-Year-Licensing-Partnership-for-DC-Characters-and-Stories>;

²⁷ Ellen Slater, “A *Minecraft* Movie’ Will Bring Exciting Toys This Spring,” *The Toy Insider* (2025), <https://thetoyinsider.com/mattel-minecraft-movie-toys/>

²⁸ Mattel, “Business Model Innovation” *Mattel, Inc.*, <https://corporate.mattel.com/business-model-innovation>; “*Mattel is No. 17 on the list of the World’s 50 Most Innovative Companies of 2024*”, Nicole LaPorte, “Why Mattel is one of the most innovative companies of 2024,” *Fast Company* (2024), <https://www.fastcompany.com/91038650/mattel-most-innovative-companies-2024>

²⁹ Scott Stein, “Hot Wheels Rift Rally Turns Your Home Into a Mixed-Reality RC Stunt Track,” *CNET* (2023), <https://www.cnet.com/tech/gaming/hot-wheels-iphone-and-playstation-mixed-reality-rc-racing-game-races-in-your-home/>.

Attack,^[30] which add just enough novelty to spark new interest in a classic game format; and Fisher-Price smart toys, which reassure parents by combining education with entertainment.^[31] None of these changes represent revolutions. They are closer to fresh coats of paint or clever twists that make classics feel new again. In a market where children's tastes evolve faster than ever, such incremental improvements are central to maintaining Mattel's resilience against obsolescence.

Mattel also consistently launches new product lines to meet evolving consumer expectations and defend against substitutes. American Girl "Truly Me" dolls allow children to see themselves reflected in their toys,^[32] while STEM Barbies^[33] reframe play as preparation for future careers, thereby transforming cultural criticism into an opportunity. The *Masters of the Universe* reboot^[34] illustrates another dimension of this strategy: the revival of nostalgic intellectual property to capture the interest of both parents, who remember the brand, and younger generations, who are encountering it for the first time. Each of these launches functions as an additional layer of protection, distributing risk across diverse audiences and reducing the vulnerability of Mattel's core portfolio.

Finally, Mattel's global reach and efficient manufacturing system underpin these strategies. By producing in Mexico, China and Indonesia, the company cushions itself against inflation and rising labor costs, while its presence in 150 countries enables growth in markets such as India and Brazil

³⁰ Mattel, "UNO FLIP™" (manual de instruções GXV56-BP), https://service.mattel.com/instruction_sheets/GXV56-BP.pdf.

³¹ Science Museum Group Collection, "Fisher Price Smart Toy Bear" (2016), <https://collection.sciencemuseumgroup.org.uk/objects/co8566144/fisher-price-smart-toy-bear>; Nancy A. Jennings, Judi Puritz Cook, "Toys That Train the Tots: Fisher-Price's Smart Toys in the Digital Age," in *The Marketing of Children's Toys* (2021), DOI: 10.1007/978-3-030-62881-9_7.

³² Mattel, "American Girl and Disney Reveal First Wave of Enchanting New Doll Collection" (2024), <https://corporate.mattel.com/news/American-Girl-and-Disney-Reveal-First-Wave-of-Enchanting-New-Doll-Collection>

³³ David Mouriquand, "Barbie honours STEM trailblazers for International Women's Day" *Euronews* (2023), <https://www.euronews.com/culture/2023/03/07/Barbie-honours-stem-trailblazers-for-international-womens-day>.

³⁴ PJ Lewis, "Mattel Announces Next Masters of the Universe Toy Collections Inspired by Upcoming Netflix Animated Series He-Man and The Masters of the Universe" *Mattel, Inc.* (2021), <https://corporate.mattel.com/news/mattel-announces-next-masters-of-the-universe-toy-collections-inspired-by-upcoming-animated-series-he-man-and-the-masters-of-the-universe>.

to offset stagnation in the United States and Europe.^[35] Combined with an expanding direct-to-consumer and e-commerce model, Mattel is less exposed to declining traditional retail channels or unfavorable trade policies.

Taken together, the maxi-mini strategy reveals a company that does not react impulsively to emerging external threats. Instead, Mattel relies on its alliances, refreshes its core products through thoughtful updates, launches new product lines in response to cultural or market developments and leverages its global scale to maintain its position. The result is not dramatic reinvention but steady, deliberate adaptation, transforming external pressures into opportunities for long-term resilience.

6 | Barbie Product Brand Defensive IP Strategy SWOT – A Maxi–Mini (ST) Focus A

The Barbie intellectual property arsenal^[36] was assessed using a weighted SWOT framework, with results presented in Table 4. The analysis shows that the brand's enforcement infrastructure is not only formidable but also calibrated to counter the most acute external threats.

³⁵ Mattel, „Revenue of Mattel worldwide from 2018 to 2024, by region (in million U.S. dollars)” *Statista* (2025), <https://www.statista.com/statistics/198722/international-revenue-of-mattel-by-region/>; S. Prakash Sethi, Emre A. Veral, H. Jack Shapiro, Olga Emelianova, „Mattel, Inc.: Global Manufacturing Principles (GMP) – A Life-Cycle Analysis of a Company-Based Code of Conduct in the Toy Industry” *Journal of Business Ethics* 99, nr 4 (2011): 483–517, DOI: 10.1007/s10551-010-0673-0; Mattel, „Mattel Announces Multi-Year Global Licensing Agreement with Universal for DreamWorks Animation's Trolls Franchise” (2022), <https://corporate.mattel.com/news/mattel-announces-multi-year-global-licensing-agreement-with-universal-for-dreamworks-animations-trolls-franchise>

³⁶ WIPO Magazine, “In the News,” *WIPO Magazine*, <https://www.wipo.int/en/web/wipo-magazine/articles/in-the-news-36699>; EUIPO, “She’s a Barbie girl in an IP world,” *EUIPO*, <https://www.euipo.europa.eu/sv/news/she-s-a-Barbie-girl-in-an-ip-world>; https://www.dpma.de/english/our_office/publications/milestones/patentsbrandspop/Barbie/index.html; DPMA, “Well protected: Barbie, Ken and the upright stand,” *DPMA*, https://www.dpma.de/english/our_office/publications/milestones/patentsbrandspop/Barbie/index.html; Selected Barbie patents (primarily hair-related): “Ken’s hair style” (patent USD689965); “Eyelash-simulating rooted fibre” (patent US3411235); “Changeable-shape hair piece and method

Table 4. Weighted SWOT Analysis of BARBIE IP Enforcement.

| SWOT Factor | Weight | Scale | Weighted Value |
|---|--------|-------|----------------|
| Strengths (S) | | | 4.60 |
| Famous BARBIE trademarks (incl. Pantone 219C) | 0.12 | 5 | 0.60 |
| Global multi-class trademark coverage | 0.10 | 5 | 0.50 |
| Design + utility patents (legacy + current) | 0.10 | 5 | 0.50 |
| Recognized trade dress (pink box / visual identity) | 0.07 | 5 | 0.35 |
| Brand-protection org & litigation budget | 0.10 | 5 | 0.50 |
| Customs/anti-counterfeit programs & registries | 0.10 | 5 | 0.50 |
| Contracts/NDAs & license clauses | 0.06 | 5 | 0.30 |
| Online enforcement tooling | 0.08 | 5 | 0.40 |
| Counsel network | 0.07 | 5 | 0.35 |
| Confusion/dilution evidence | 0.10 | 5 | 0.50 |
| Weaknesses (W) | | | 3.24 |
| Expired patents | 0.12 | 3 | 0.36 |
| Parody/fair-use limits | 0.11 | 3 | 0.33 |
| PR risk from over-enforcement | 0.11 | 3 | 0.33 |
| Jurisdictional delays | 0.12 | 4 | 0.48 |
| High cost/uncertain litigation | 0.12 | 4 | 0.48 |
| Trade dress fact-intensive | 0.09 | 3 | 0.27 |
| Legacy license encumbrances | 0.09 | 3 | 0.27 |
| Partner non-compliance | 0.12 | 3 | 0.36 |
| Evidence collection burdens | 0.12 | 3 | 0.36 |

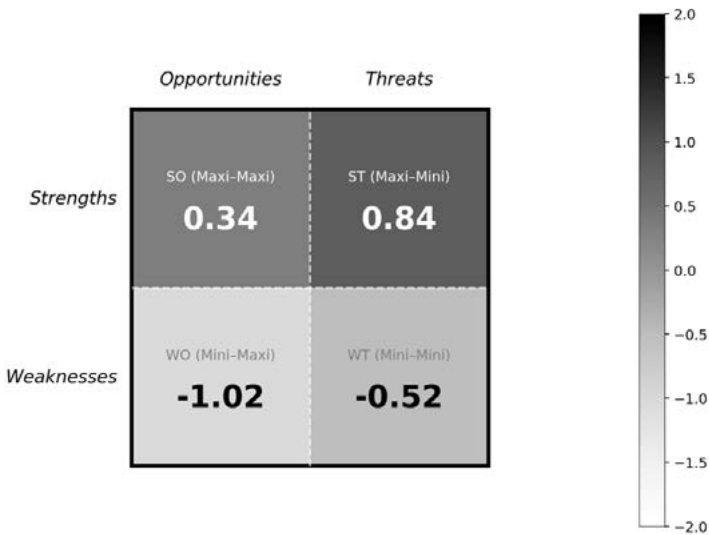
of styling” (patent US3955587); “Winking apparatus” (patent US4424644); “Doll simulating yoyo play” (patent WO200108774); “Doll having spinning light supporting belt” (patent WO200268080), “Hair-styling doll head having colour-change hair crimper” (patent WO2004108240), “Doll responding to human breath such as caused by whispering, speaking, singing, or blowing” (patent WO200424276), “A stand that generates electrostatic charge to make the doll’s hair move” (patent US9205342), cf. Lucy Crook, Jingshen Chen, “Life in plastic, it’s patented” *CSIRO* (2023), <https://www.csiro.au/en/news/All/Articles/2023/August/Barbie-ip>.

| SWOT Factor | Weight | Scale | Weighted Value |
|---------------------------|---------------|--------------|-----------------------|
| Opportunities (O) | | | 4.26 |
| AI anti-counterfeit | 0.12 | 5 | 0.60 |
| Customs MOUs/seizures | 0.10 | 4 | 0.40 |
| Expanded registrations | 0.10 | 4 | 0.40 |
| UDRP/URS efficiencies | 0.08 | 4 | 0.32 |
| Marketplace registries | 0.12 | 5 | 0.60 |
| Cross-border hubs | 0.10 | 4 | 0.40 |
| Legislative advocacy | 0.10 | 4 | 0.40 |
| Defensive publications | 0.08 | 3 | 0.24 |
| Settlements/test cases | 0.10 | 4 | 0.40 |
| Supplier serialization | 0.10 | 5 | 0.50 |
| Threats (T) | | | 3.76 |
| Counterfeit networks | 0.12 | 5 | 0.60 |
| Expanding parody/fair-use | 0.10 | 4 | 0.40 |
| Jurisdictional variance | 0.11 | 4 | 0.44 |
| Genericide/dilution | 0.09 | 3 | 0.27 |
| Competitor look-alikes | 0.11 | 4 | 0.44 |
| Marketplace policy shifts | 0.09 | 3 | 0.27 |
| Gray-market imports | 0.09 | 3 | 0.27 |
| Budget pressures | 0.09 | 3 | 0.27 |
| Enforcement lag | 0.10 | 4 | 0.40 |
| AI-generated look-alikes | 0.10 | 4 | 0.40 |

5.1. Interpretation of Results

The quantitative assessment is clear: $S=4.60$, $W=3.24$, $O=4.26$, $T=3.76$, producing a net ST balance of $+0.84$ – a decisive margin compared with weaker quadrants (SO $+0.34$; WO -1.02 ; WT -0.52).

Figure 4. TOWS Heatmap for IP Defensive Strategy (Maxi-Mini).



In practical terms, Barbie’s enforcement capacity – recognized marks with global coverage, trade dress with high consumer recognition, well-resourced anti-counterfeit programs and a seasoned litigation apparatus – directly eclipses the most pressing risks: sophisticated counterfeiters, AI-driven look-alikes and uneven jurisdictional regimes.^[37]

The implication is not subtle: Barbie does not prevail by pursuing every opportunity (cf. aggressive but often fruitless class-expansion strategies in *Tiffany v. Costco*^[38]) or by remedying every weakness (cf. dilution

³⁷ S. Prakash Sethi, Emre A. Veral, H. Jack Shapiro, Olga Emelianova, “Mattel, Inc.: Global Manufacturing Principles (GMP) – A Life-Cycle Analysis of a Company-Based Code of Conduct in the Toy Industry”; David Barboza, Louise Story, “Toy Making in China, Mattel’s Way”; M.G. Lord, *Forever Barbie: The Unauthorized Biography of a Real Doll*; Orly Lobel, *You Don’t Own Me: How Mattel V. MGA Entertainment Exposed Barbie’s Dark Side*.

³⁸ No. 17-2798 (2d Cir. 2020).

claims undermined by parody defenses in *Mattel v. MCA Records*^[39], but by operating a fortress-defense paradigm^[40]. This strength is anchored in incontestable fame of the Barbie marks (Lanham Act §43(c)), codified color rights (Pantone 219C),^[41] multi-class global registrations, trade dress with secondary meaning (cf. *Two Pesos v. Taco Cabana*^[42]) and a well-financed litigation apparatus.

This strategic posture is deliberately selective and surgical. Customs interventions must be scaled to restrict counterfeit ingress at key systemic nodes (e.g., CBP/ICE seizures in U.S. ports, EUROPOL-coordinated container inspections in Rotterdam/Antwerp, and MOU frameworks in Shenzhen/Guangzhou). Marketplace enforcement should deepen “stay-down” integration with platforms such as Amazon’s Project Zero, Alibaba’s Good Faith Program and Shopee/Tokopedia registries, thereby transforming reactive takedowns into automated, systemic exclusion. Technological augmentation is essential: AI-driven counterfeit detection through perceptual hashing, adversarial image recognition, blockchain-based serialization and GAN- and deepfake-based filtering mechanisms.

Litigation strategy shifts from breadth to precedent engineering: focusing on disputes where factual patterns maximize deterrence (e.g., blatant look-alike dolls triggering *Polaroid* multifactor likelihood-of-confusion tests, deepfake campaigns implicating false endorsement under Lanham Act §43(a) and grey-market imports raising international exhaustion defenses). Venue choice is critical. In the U.S., the Southern District of New York (SDNY) is often preferred for cases involving trademark dilution and parody, given its well-developed jurisprudence in those areas. The International Trade Commission (ITC) provides powerful exclusion orders with global deterrent impact. In Europe, the UK High Court can establish cross-border injunctive precedents, while German Regional Courts (e.g., Hamburg, Düsseldorf) are valued for granting rapid *ex parte* relief.

Barbie’s defensive apparatus thus measures success not in the ubiquity of filings but in the strategic density of enforcement: actions that are highly visible for deterrent effect, doctrinally calibrated to avoid overreach

³⁹ 28 F. Supp. 2d 1120 (1998).

⁴⁰ More about fortress strategy cf. M.Jankowska, *Legal Warriors...*

⁴¹ Micah Barrett, “How ‘Barbie Pink’ Became A Trademark Protected Color of Mattel” *Rockridge Law* (2024), <https://rockridgelaw.com/2024/06/20/how-Barbie-pink-became-a-trademark-protected-color-of-mattel/>; *Qualitex Co. v. Jacobson Products Co., Inc.*, 514 U.S. 159 (1995).

⁴² *Two Pesos v. Taco Cabana, Inc.*, 505 U.S. 763 (1992).

backlash (cf. *Louis Vuitton v. Haute Diggity Dog*^[43] parody losses) and financially asymmetrical in a manner that imposes significant burdens on counterfeiters through discovery obligations, bond requirements and injunctive compliance well before Mattel's own apparatus is strained. In effect, ubiquity dilutes, whereas discipline deters.

7 | Barbie Product Brand IP Offensive Strategy SWOT – A Maxi–Maxi (SO) Focus

While defensive enforcement is vital, Barbie's intellectual property portfolio also functions as a growth engine. A weighted SWOT analysis of monetization capacity confirms that Barbie's brand and licensing strengths significantly outpace the available opportunity set, supporting a Maxi-Maxi (SO) posture. In this context, IP operates not as a shield but a multiplier, enabling Barbie to scale across film, fashion, gaming and digital ecosystems while carefully managing exposure risks.

Table 5. Weighted SWOT Analysis of Barbie IP Monetization.

| SWOT Factor | Weight | Scale | Weighted Value |
|---|--------|-------|----------------|
| Strengths (S) | | | 4.75 |
| Iconic BARBIE brand & color mark (219C) | 0.12 | 5 | 0.60 |
| Extensive character & storyline IP | 0.10 | 5 | 0.50 |
| Mature licensing machine & partner network | 0.12 | 5 | 0.60 |
| In-house content arms (Mattel Films/Television) | 0.10 | 5 | 0.50 |
| Global TM coverage enabling category expansion | 0.08 | 5 | 0.40 |
| Design language/trade dress & style guides | 0.08 | 4 | 0.32 |
| Consumer insight/data for extensions | 0.07 | 4 | 0.28 |
| Digital rights readiness (virtual goods/NFTs) | 0.10 | 4 | 0.40 |
| Co-brand credibility with fashion/luxury | 0.11 | 5 | 0.55 |
| Royalty/commercialization expertise | 0.12 | 5 | 0.60 |

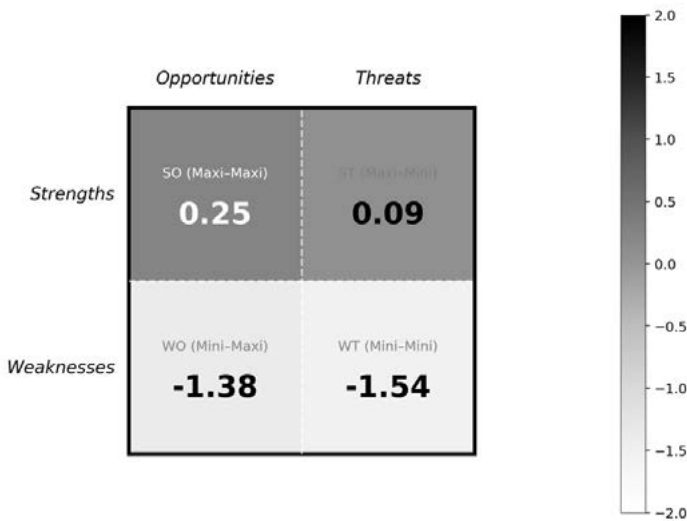
⁴³ *Louis Vuitton v. Haute Diggity Dog*, No. 06-2267 (4th Cir. 2007).

| SWOT Factor | Weight | Scale | Weighted Value |
|---|--------|-------|----------------|
| Weaknesses (W) | | | 3.12 |
| Portfolio concentration | 0.12 | 3 | 0.36 |
| Clearance/approvals bottlenecks | 0.10 | 3 | 0.30 |
| Royalty leakage/audit friction | 0.10 | 3 | 0.30 |
| Rights fragmentation | 0.12 | 3 | 0.36 |
| Brand-fit constraints | 0.10 | 3 | 0.30 |
| Creator/talent dependency | 0.10 | 3 | 0.30 |
| Gaps in emergent genres (e.g, live-service games) | 0.12 | 3 | 0.36 |
| Over-licensing dilution risk | 0.12 | 3 | 0.36 |
| Regulatory constraints (kids' privacy/ads) | 0.12 | 4 | 0.48 |
| Opportunities (O) | | | 4.50 |
| Feature films & streaming franchises | 0.14 | 5 | 0.70 |
| AAA/AA video games & live ops | 0.12 | 5 | 0.60 |
| Fashion/luxury collabs & drops | 0.12 | 5 | 0.60 |
| Experiential (attractions, pop-ups) | 0.10 | 4 | 0.40 |
| DTC customization/marketplaces | 0.10 | 4 | 0.40 |
| International/local-language content | 0.09 | 4 | 0.36 |
| Virtual goods, UGC platforms, metaverse | 0.12 | 5 | 0.60 |
| Education/STEM/edutainment | 0.10 | 4 | 0.40 |
| AI-assisted content production | 0.11 | 4 | 0.44 |
| Threats (T) | | | 4.66 |
| Competing franchises (Disney, Hasbro, anime IPs) | 0.12 | 5 | 0.60 |
| Content cycle volatility/hit risk | 0.11 | 5 | 0.55 |
| Platform policy shifts | 0.10 | 5 | 0.50 |
| Digital IP theft/brand-jacking | 0.10 | 5 | 0.50 |
| Consumer fatigue/overexposure | 0.10 | 5 | 0.50 |
| Partner concentration risk | 0.10 | 4 | 0.40 |
| Macro downturns | 0.10 | 4 | 0.40 |
| Regulatory scrutiny (kids' ads/content) | 0.13 | 5 | 0.65 |
| Tech disruption/obsolescence | 0.14 | 4 | 0.56 |

6.1. Interpretation of Results

The quantitative assessment is conclusive: $S=4.75$, $W=3.12$, $O=4.50$, $T=4.66$, with $SO = +0.25$ confirming a Maxi-Maxi trajectory.

Figure 5. TOWS Heatmap – IP Offensive Strategy (Maxi-Maxi).



Barbie’s monetization infrastructure is sufficiently robust/resilient to exploit the opportunity curve, however, the narrow ST margin (+0.09) and negative WO (-1.38) and WT (-1.54) values demonstrate that unmanaged weaknesses – such as portfolio concentration, clearance bottlenecks, rights fragmentation and regulatory friction – would erode growth if not constrained by structural safeguards.

In practice, this offensive posture translates into a program of curated expansion. The brand must convert its narrative universe and global mark portfolio into repeatable content pipelines rather than isolated spectacles. Feature films and streaming series should be treated as serialized IP engines, akin to the Marvel Cinematic Universe model, with multi-title slates distributed across Netflix, Amazon and regionally dominant OTT (“Over-the-Top”) platforms such as Tencent Video and Viacom. This approach hedges against the volatility associated with one-off box office performance, a structural lesson drawn from failures such as *John Carter*, while fostering sustained cultural saturation. Parallel gaps in the gaming

vertical must be closed through presence in live-service ecosystems: Barbie should exist simultaneously in avatar-based economies, such as in *Roblox* and *Fortnite*, and as the protagonist of AAA narrative-driven titles, using *Sims*-like simulation or Ubisoft-style open world design to anchor continuous digital relevance.

Fashion and luxury collaborations, already proven through Balmain and Moschino tie-ins,^[44] must evolve into rotating capsule partnerships with Dior, Chanel, or Louis Vuitton, engineered for scarcity through Supreme-style drop mechanics and secondary-market resale to reinforce exclusivity. Trademark licensing doctrine requires rigorous quality control in such arrangements; approval rights and brand-fit review boards thus become not merely marketing preferences but legal necessities for preserving enforceability under the Lanham Act. The digital frontier is equally central: Barbie's presence in user-generated content (UGC) environments such as TikTok's Effect House, Zepeto and metaverse spaces must be accompanied by NFTs structured as utility tokens, rather than securities, to avoid SEC scrutiny, with blockchain-based authentication serving the dual function of monetization and IP protection.

Experiential expansion, already tested in Malibu Dreamhouse activations,^[45] must be formalized into permanent or semi-permanent sites modeled on LEGO House in Billund, augmented by traveling exhibitions and pop-up installations linked to cinematic or digital release cycles. Educational and STEM tie-ins – such as robotics kits, AR-enabled mathematics games, and edutainment hybrids – function as both commercial growth vectors and compliance instruments within COPPA (US) and GDPR-K (EU) frameworks, thereby ensuring that expansion into youth-facing environments does not trigger regulatory backlash.

The overarching risk is overexposure, fatigue and dilution. To mitigate these, Barbie must institutionalize governance: brand-fit councils to screen partners, categorical caps to prevent market cannibalization, territorial exclusivity to stagger demand and auditable royalty-tracking to reduce

⁴⁴ Tanya Klich, “How Balmain And Barbie Are Defining The Future Of NFTs For Fashion, Tech And Toys,” *Forbes*, January 12, 2022, <https://www.forbes.com/sites/tanyaklich/2022/01/12/balmain-barbie-and-the-future-of-nfts-for-fashion-tech-and-toys/>.

⁴⁵ Danielle Directo-Meston, “Malibu’s Barbie DreamHouse Airbnb Got a Ken-ergy Makeover – Here’s How to Get the Look at Home,” *The Hollywood Reporter*, July 16, 2023, <https://www.hollywoodreporter.com/lifestyle/shopping/barbie-dreamhouse-malibu-airbnb-photos-shop-decor-1235524575/>.

revenue leakage. Release cadence should be sequenced so that films function as tentpoles, gaming and fashion collaborations sustain mid-cycle engagement and digital goods provide constant, low-friction touchpoints, collectively orchestrated into a rhythm that maximizes royalty yield without exhausting consumer attention.

Barbie's offensive apparatus thus rests not on indiscriminate ubiquity but on sequenced ubiquity, a form of curated proliferation where every activation – whether cinematic, interactive, sartorial, or digital – is timed and governed with a level of precision comparable to litigation strategy on the defensive side. In effect, Barbie's growth is secured not by saturating every channel, but by engineering spectacle within disciplined constraints, whereby ubiquity enhances value precisely because it is never allowed to collapse into uncontrolled expansion.

8 | Why Both Strategies Can Run in Parallel

Intellectual property is both a shield (in its defensive use against counterfeits and competitors) and a sword (in its offensive use to expand into media, licensing, and new markets). This implies that the same asset can serve multiple functions.^[46] Large firms like Mattel separate Brand Protection

⁴⁶ Agnieszka Zakrzewska-Bielawska, *Ambidextrous Strategy: Antecedents, Strategic Choices, and Performance* (New York: Routledge, 2021); Hsing-Er Lin, I-Chieh Hsu, Audrey Wenhsin Hsu, Hsi-Mei Chung, "Creating Competitive Advantages: Interactions Between Ambidextrous Diversification Strategy and Contextual Factors from a Dynamic Capability Perspective," *Technological Forecasting and Social Change* 154 (2020): 119952; Tobias Kollmann, Andreas Kuckertz, Christoph Stöckmann, "Continuous Innovation in Entrepreneurial Growth Companies: Exploring the Ambidextrous Strategy," *Journal of Enterprising Culture* 17, no. 3 (2009): 297-322; Yejing Wang, Haili Zhang, Michael Song, "Pure or Ambidextrous Strategy? A Study of Responsive and Proactive Market Orientations in Industrial Firms," *Journal of Business & Industrial Marketing* 35, no. 6 (2020): 1001-1010; Marco Bettiol, Mauro Capestro, Eleonora Di Maria, Stefano Micelli, "Ambidextrous Strategies in Turbulent Times: The Experience of Manufacturing SMEs During the COVID-19 Pandemic," *International Journal of Physical Distribution & Logistics Management* 53, no. 2 (2023): 248-272; Chun-Hsien Wang, Tachia Chin, Jie-Heng Lin, "Openness and Firm Innovation Performance: The Moderating Effect of Ambidextrous Knowledge Search Strategy," *Journal of Knowledge Management* 24, no. 2 (2020): 301-323; Alexandra Ioanid, Denisa Iliescu, "Barbie's Success in the New Business Era: Technology, Innovation

and Legal functions from Licensing and Business Development. The former may operate a maxi-mini (defensive) strategy, while the latter may pursue a maxi-maxi (offensive) strategy, often reporting to different executives but coordinating through brand councils. These approaches are therefore complementary and not conflicting. Protecting trademarks and trade dress from dilution (defensive) enables high-value licensing into film, fashion and digital games (offensive). Without robust defenses, licensing revenues would collapse.

Table 6. Implications of the dual TOWS analysis – defensive vs. offensive IP strategy for Barbie.

| Strategy of Choice | Result | Takeaways |
|--------------------|----------------------------|---|
| Defensive IP SWOT | ST = +0.84 is the standout | enforcement strengths (famous trademarks, customs/takedowns, legal muscle) are materially greater than aggregate threats. Mattel should prioritize protection plays (more seizures, platform stay-downs, AI detection, selective litigation). |
| Offensive IP SWOT | SO = +0.25 edges out ST | with strong brand/production/licensing assets, Mattel can lean into growth opportunities (films/series, games, fashion, experiential, virtual goods, luxury collabs) – but threats are non-trivial (T = 4.66), so offense must be disciplined (avoid overexposure; hedge hit risk). |

Figure 6. Ambidextrous IP Framework - comparative TOWS scores for Barbie’s defensive and offensive IP strategies.

| Quadrant | Defensive IP SWOT | Offensive IP SWOT | Lead strategy |
|-------------------------------|-------------------|-------------------|---------------------|
| SO (Strengths-Opportunities) | +0.34 | +0.25 | Offense (Maxi-Maxi) |
| ST (Strengths-Threats) | +0.84 | +0.09 | Defense (Maxi-Mini) |
| WO (Weaknesses-Opportunities) | -1.02 | -1.38 | Weakness exposure |
| WT (Weaknesses-Threats) | -0.52 | -1.54 | Weakness exposure |

The table juxtaposes the four TOWS quadrant scores derived from two independent weighted SWOT analyses: one calibrated for IP enforcement (defensive), the other for IP monetization (offensive). The shaded cells

and Performance. The Mattel Case,” *Management & Marketing Journal* 21, no. 2 (2023); Ludwig Maul, Sabine Pur, Michael Heinz, “Playing with Emerging Technologies: Comparing LEGO, Hasbro, Mattel’s Strategic Responses,” in *ISPIM Innovation Symposium* (Manchester: The International Society for Professional Innovation Management (ISPIM), June 2025), 1-17; Charles A. O’Reilly III, Michael L. Tushman, “The Ambidextrous Organization,” *Harvard Business Review* 82, no. 4 (2004): 74-81.

identify the dominant strategy per quadrant. Both strength-led quadrants return positive net scores – ST (+0.84) under the defensive model and SO (+0.25) under the offensive model – confirming that Barbie’s IP portfolio supports a simultaneous shield-and-sword position. The consistently negative weakness-led quadrants (WO and WT) across both models underscore the unmanaged vulnerabilities – portfolio concentration, rights fragmentation and regulatory friction – would erode either strategy if left unaddressed. The resulting pattern validates an ambidextrous IP strategy in which enforcement and commercialization operate as complementary, not competing, functions.

9 | Ambidextrous IPS. Summary

The strategic management of intellectual property, or IPS, has increasingly moved beyond the dichotomy of defensive enforcement and offensive commercialization. In practice, leading firms adopt what scholars of organizational theory describe as an “ambidextrous strategy”, whereby they simultaneously exploit opportunities for growth while exploring or reinforcing mechanisms to protect existing resources. For Mattel, Barbie exemplifies this dual approach: the doll is both a *cultural icon* that must be defended against counterfeiting, dilution and unauthorized use, and a dynamic *intellectual property asset* leveraged across films, fashion and digital ecosystems.

On the defensive side, Mattel has invested heavily in preserving Barbie’s distinctiveness under trademark, trade dress and copyright law. The company has litigated against counterfeiters, pursued domain name disputes under the Uniform Domain-Name Dispute-Resolution Policy (UDRP) and resorted to customs seizures to protect brand integrity.

Concurrently, Barbie functions as an instrument of offensive IP strategy. The 2023 *Barbie* feature film demonstrates the brand’s licensing and co-branding potential, generating over USD 1 billion at the box office while facilitating cross-industry collaborations in fashion, cosmetics and gaming. IP assets are not only protected but also actively deployed to capture value in adjacent markets. In this way, Barbie’s trademarks, character copyrights, and narrative universe become transferable vehicles for monetization across entertainment, digital media and luxury goods.

The dual role of Barbie's IP demonstrates that defensive and offensive strategies are not mutually exclusive but rather symbiotic. Enforcement actions against counterfeit dolls in China, for example, not only preserve consumer trust but also reinforce the legitimacy of luxury fashion collaborations. Likewise, the legal defense of Barbie's trade dress reinforces its cultural distinctiveness, which in turn enhances the appeal of IP-based extensions such as the *Barbie* film or themed video games. Mattel's ability to operate effectively in both the ST and SO quadrants makes Barbie an instructive case study in robust ambidextrous IP strategy.

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