



KANTAR

Marketing playbook for a circular economy



About this playbook

This playbook is designed to help marketers navigate the challenges and opportunities of shifting to a circular economy. Written in partnership between the Ellen MacArthur Foundation and the Kantar Sustainable Transformation Practice, it builds on existing research as well as first-hand knowledge of over 50 marketing and communications professionals in both agencies and businesses at the forefront of the circular economy transition. This playbook outlines four action pathways for marketers to deliver economic and environmental benefits to their businesses, customers, and society by supporting the shift to a circular economy.

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Marketers shape the aspirations and behaviours of millions of people around the world every day, and for years have successfully driven unprecedented demand for linear solutions. Imagine if we channelled this knowledge, expertise, and creativity into driving circular solutions? A circular economy offers a unique opportunity to decouple economic outcomes from resource use, whilst continuing to deliver on what people need and desire.

Jonathan Hall, Managing Partner, Kantar's Sustainable Transformation Practice

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A circular economy is about giving people better choices. But for these products and services to become the norm they need to be irresistible. Marketers need to celebrate the benefits of these new offers and not rely on people 'doing the right thing'. Cracking this will open up a world of opportunity.

Joe Murphy,
Executive Lead, Ellen MacArthur Foundation

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A roadmap to build thriving brands: circular economy as a marketing enabler

Marketers are a pivotal force in scaling a circular economy. They can take a leadership role in transforming organisations and facilitating shifts in consumer behaviour to deliver tangible benefits for businesses, people, and planet.

Businesses have created a now-normalised state of overconsumption by creating artificial needs and tapping into pervasive elements of the [linear 'take-make-waste' economic system](#), such as planned obsolescence. Overconsumption strains our climate and natural systems and jeopardises the functioning of our economy.

But society is on the cusp of change; consumers are starting to buy into brands that can cater to their needs without degrading the Earth in the process. [Kantar's 2022 Global Issues Barometer](#) found that 64% of people believe businesses have a responsibility to solve climate and environmental problems. **They will spend on brands that can find ways to eradicate waste and pollution while still offering the essentials of value and convenience.**

A circular economy provides a means to generate better value for customers and increase competitiveness and [business resilience](#), all whilst tackling [climate change](#) and allowing [biodiversity to thrive](#). In a circular economy,

[an expanded customer base](#) after introducing [a rental service for hair removal devices](#) that reduced the cost of access to high-end devices whilst helping keep such devices in use for longer.



Marketing has always been a powerful force in driving market demand and shifting behaviour and culture. These skills will be critical to a circular economy boom.

Hannah Harrison, Chief Sustainability Officer, WPP

waste is eliminated, resources are circulated, and nature is regenerated. To become a circular economy leader, a brand must address both supply and demand aspects: from product design and infrastructure to consumer relationships and its revenue model. Circular business models (CBMs) — such as reuse, repair, and rental — allow brands to differentiate themselves, strengthen customer loyalty, and unlock new revenue streams. Philips, for example, [reported](#)

CBMs can positively impact the relationship between brands and customers: from transactional sales-driven models to more meaningful and value-driven exchanges that extend beyond the initial point of sale. Additionally, circular strategies can position businesses ahead of the curve when it comes to compliance with evolving regulations — particularly the need to minimise Scope 3 emissions (those that a company are indirectly responsible for).

A huge momentum has built behind the circular economy, and businesses across all sectors are adapting strategies to embrace its opportunities. The circular economy has gained global recognition: its principles prominently featured in the [COP28 outcome statement](#) as a key strategy for mitigating climate change. Scientist [Johan Rockström](#) has identified circular business models as a critical factor in keeping the world within planetary boundaries. Fashion companies are working on [how to make money without making new clothes](#); the built environment is recognising [the economic and social benefits of nature-positive cities](#); and businesses across the food system are using [circular design principles to pioneer nutrient-rich products that allow nature to thrive](#). These nature-first strategies avoid greenwashing by offering genuine innovation and impact.

Supporting this transition is a growing body of evidence demonstrating the business case for a circular economy, as well as examples of circular business models delivering significant return on investment. A [2023 Bain study](#) found that executives expect the share of revenue from circular products and services to grow by 30% between 2021 and 2030. In 2018, a WBCSD and BCG survey found that [“81% of companies with a circular strategy have a clear business case underlying it... The business case is usually strongly linked to acquiring new customers, strengthening existing customer relationships, or opening new markets.”](#) In short, **transitioning to a circular economy is a commercial imperative, not just an environmental one.**

Marketing teams hold the key to unlocking major challenges to scaling circular approaches. With their deep understanding of consumer behaviour and ability to influence, marketers can use their skills and knowledge to respond both to the opportunities of a circular economy and consumers’ desires to be involved in it. They can influence which items and lifestyles are viewed as aspirational and shape how innovation budgets are spent to respond to consumer needs.

MARKETING

skills could hold the answer to game-changing questions, such as:

How might
**REUSABLE
PACKAGING**
become aspirational



What kinds of messaging
can encourage consumers to
REPAIR AND SHARE



How can brands help
**REDEFINE
CONSUMPTION**
and normalise circular lifestyles



To create this playbook, **Kantar** and the **Ellen MacArthur Foundation** collaborated to explore how marketers are already capitalising on the competitive advantage that circularity can offer. Between 2023 and 2024, interviews and workshops were conducted with over 50 marketing and communications professionals in both agencies and businesses at the forefront of the circular economy transition. Pre-existing research from Kantar, the Ellen MacArthur Foundation, and others has also been leveraged. From the findings, four action pathways were identified to enable marketers to advance circular economy transformation within businesses:

1 Create scalable circular solutions

Move from one-off pilots towards core circular revenue generation models

1

2

2 Drive demand for circular propositions

Move from niche towards mass-market appeal

3 Make circular behaviours irresistible

Move from transactional towards long-lasting customer-brand relationships

3

4

4 Hardwire circular KPIs

Move from sales-driven KPIs towards value-focused outcomes

This playbook serves as a guide to transforming your organisation and your relationship with consumers — from linear to circular. It outlines the commercial benefits of the circular economy for brands, and shares practical guidance on how marketers can scale profitable circular solutions that engage consumers whilst avoiding waste and pollution. This playbook is intended as a starting point, rather than an exhaustive plan, and we recognise that there are wider considerations and challenges on the path to a circular economy. We encourage marketers to creatively experiment with circular solutions — inspired by the principles in this playbook. By their unique skill sets, marketers can spearhead the adoption of circular initiatives and become catalysts for change.

Part 1:

The circular economy opportunity for marketing

New to the circular economy?
Start here for the why, what, and who

What is a circular economy?

Our current economy is mostly linear: we take materials from the Earth, make products from them, and eventually throw them away as waste — losing all their value and generating pollution. A circular economy, by contrast, proposes a different way of fulfilling human needs, decoupling economic activity from the consumption of finite resources.

The circular economy offers a framework for businesses to address commercial and global priorities, such as reducing costs, increasing resilience, improving customer propositions, and reducing environmental impact. It is based on three principles, driven by design:



Eliminate waste and pollution



Circulate products and materials (at their highest value)



Regenerate nature

Products and materials are kept in circulation through processes like maintenance (including repair), reuse, access models, refurbishment, remanufacture, recycling, and composting. Repair and reuse come first in that sentence for a reason: **if we can keep things in use in their existing form, we can minimise resource use.** Recycling is better than landfilling, but, given the energy use required, it's not as good as repairing to keep a product in use for longer.

Bringing a circular economy approach into a business is most effective when facilitated by a mindset shift right from the top. A new corporate strategy can facilitate a redesign of business models, products, and services so that waste and pollution are avoided and nature is regenerated. It's a fundamental change that has implications for every corner of the business world and the financial system that enables it. However, marketers can begin to seed circular changes, even before a central circular strategy is in place. **The key is to find ways to help consumers value and take care of products longer than is currently the norm.**

Sustainability and circular economy are often used interchangeably within a corporate setting, but they are distinct approaches to tackling core business and environmental issues, and so is the role of marketing within each:

- **In a classic sustainability framework**, the marketing job typically ends with the sale of a product with a reduced environmental and social impact.
- **In a circular economy**, the marketing role expands well beyond the point of sale of a physical product as items are circulated multiple times via circular activities including reuse, repair, or rental. This opens a myriad of possibilities to create mutually beneficial, long-lasting relationships with consumers and users throughout a product's lifecycle.



A key difference between traditional sustainability and the circular economy is the length and nature of the customer relationship. The latter can literally go on forever, and offers much greater scope to change behaviour

David Yates,
Founding Partner (CX), Uncommon Creative Studio

Circular business models protect the planet – and offer opportunities for brand differentiation

Traditional linear business models depend on a 'make-more-sell-more' approach to increase revenues. For example, a car manufacturer aims to sell as many cars as possible while trying to minimise manufacturing costs – thus maximising profits. As the market matures and competition intensifies, the manufacturer might need to reduce the price to retain market share, or to innovate and differentiate its offering by launching new models. The pressure on price, on the one hand, and any increase in raw material prices, on the other, forces the manufacturer to sell more units and reduce manufacturing and labour costs to continue making profits.

FIGURE 1
A linear 'make-more-sell-more' customer journey

Linear product is designed and manufactured

Customer purchases linear product

Customer disposes of linear product



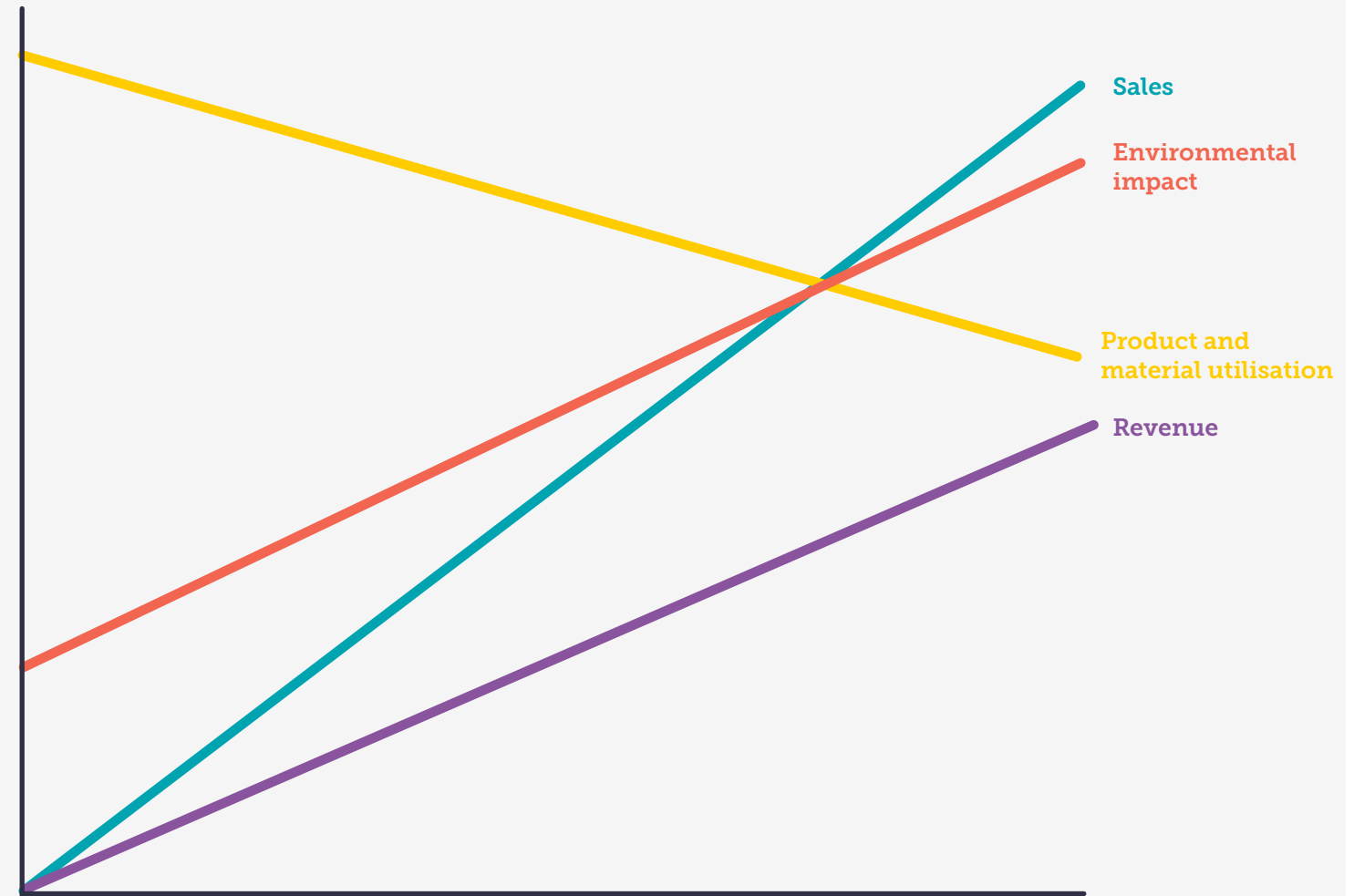
Product with brand (or partners)

Product with customer

As the linear business model depends on making and selling more products, the drive for profit growth means hunting for efficiencies, incremental features, and new markets. But this mass manufacturing comes at very high environmental and social costs, with unrelenting pressure on finite natural resources, waste and pollution, lower wages, and job losses through, for example, automation. Taking the automobile example above, waste is inherent to the model: an average European car is parked 92% of the time, and is designed for five people but usually carries one. This is a waste of the financial, intellectual, human, material, and energy resources that went into the making of this car (such as steel, plastics, polymers, rare earth metals, paints, glass, adhesives, electronics, etc.)

A business can try to reduce its environmental impact through materials and energy efficiency initiatives. However, due to the nature of the traditional business model, the impacts are essentially bound or 'coupled' with the business revenue growth.

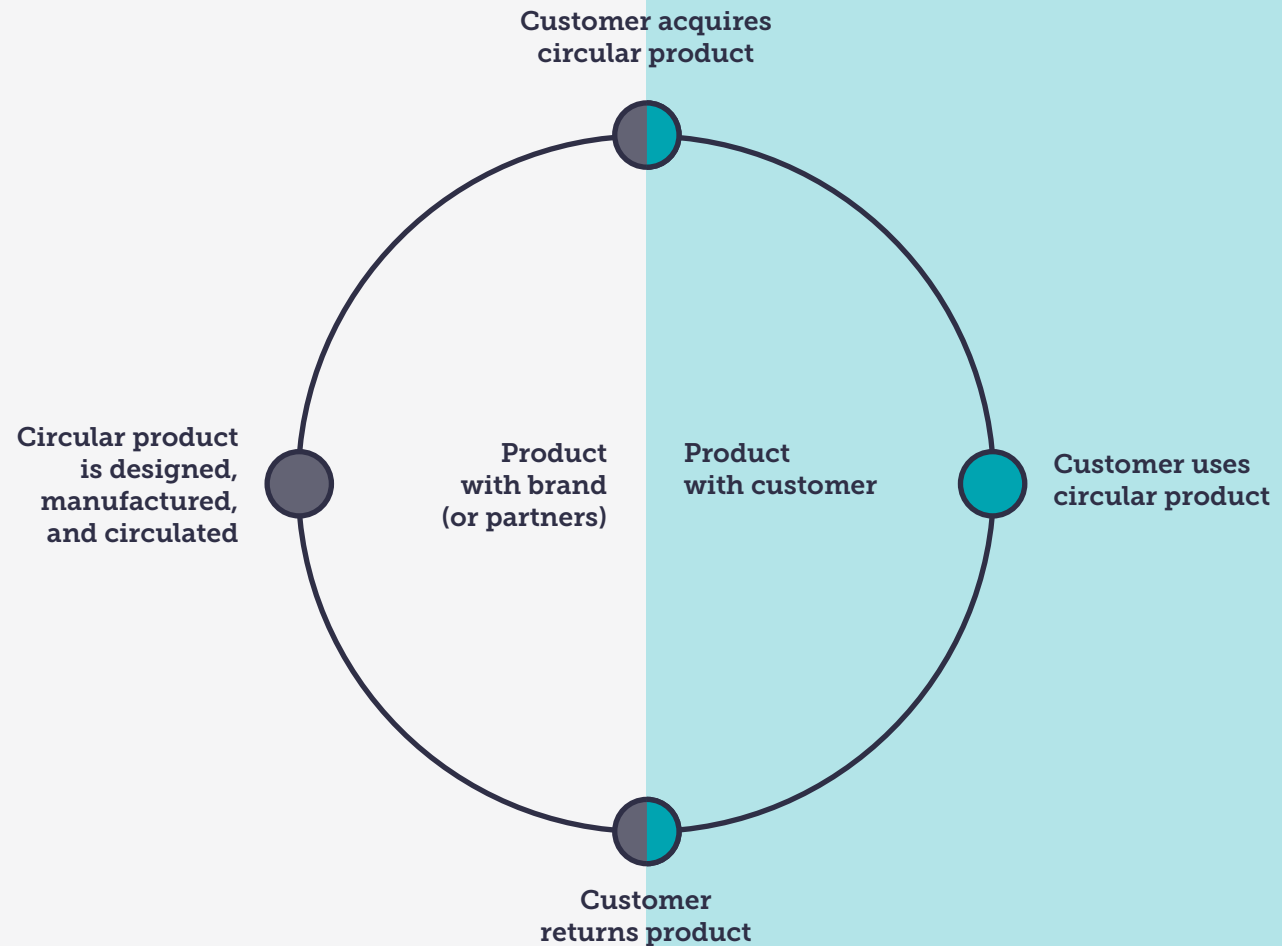
FIGURE 2
In a linear economy, revenues are coupled with production and finite resource consumption.



Circular business models (CBMs) offer an entirely different approach to generating revenue, as they shift the sole focus from selling products to providing and preserving value, whether through traditional sales or innovative circular services and activities. This provides a significant opportunity for consumers to access new products and services that fulfil their needs whilst reducing the environmental impact of their purchasing behaviours, whether that is finding ways to extend the life of products, or offering access to products for shorter time periods at a lower cost. **For marketers, CBMs offer a way to build brand differentiation, especially in mature markets where brand growth is currently fought for, often via small incremental additions to products.**

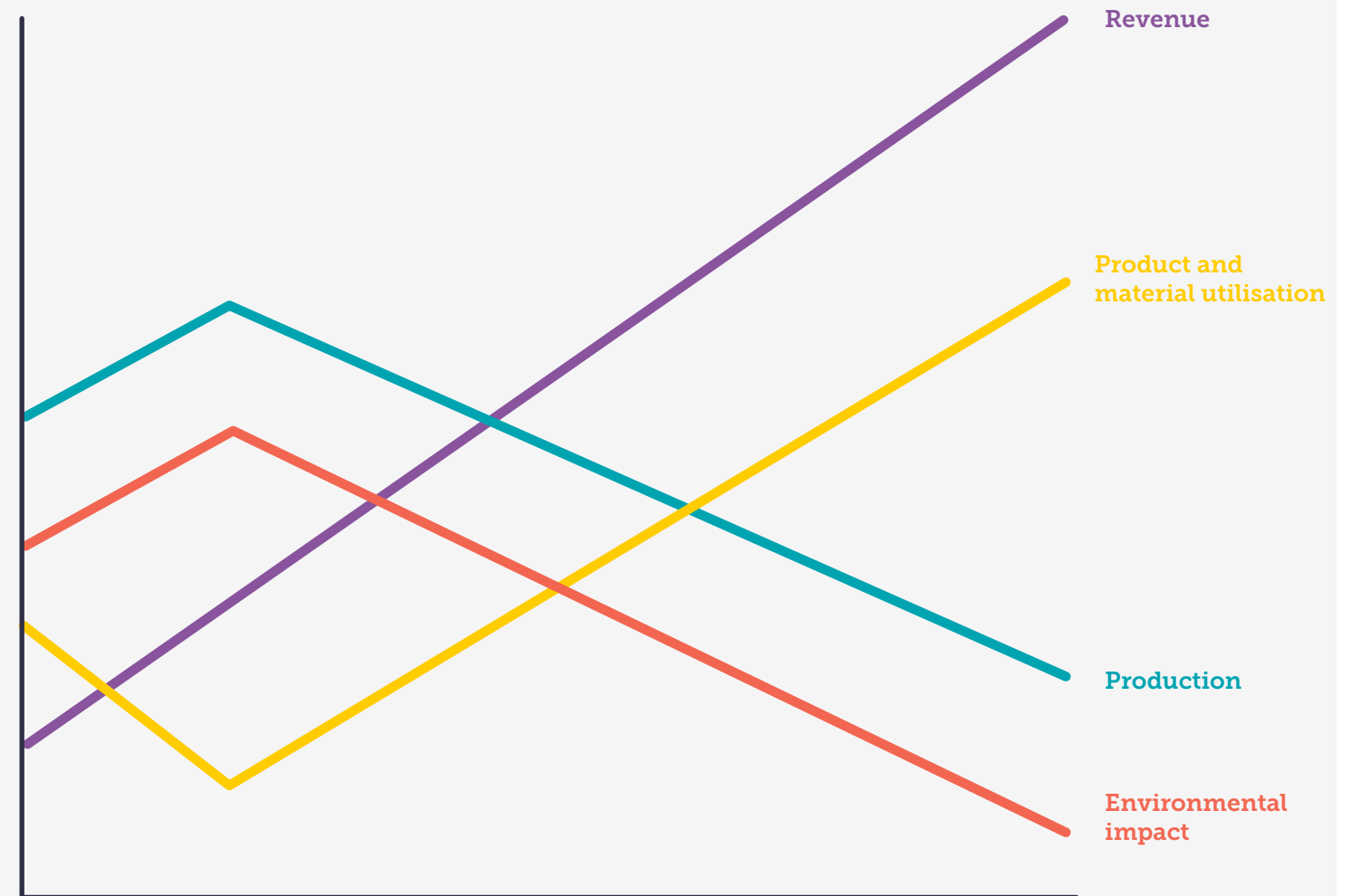
CBMs also enable a business to grow without a parallel environmental impact. In the automobile example, if the business model focuses on 'access' instead of 'ownership', the car manufacturers no longer need to keep making more cars but derive their revenue from the use rather than the sale of vehicles. The customers can rent, lease, or pay per kilometre (or mile) driven. In this business model, the longer the car is used, the more revenue the manufacturer will receive. And, at the same time, the need for virgin raw materials, energy, new factories, new models, and new markets is no longer the priority. If this business model grows, the environmental impact does not increase proportionately, or in other words, the business model is relatively decoupled from the environmental impact.

FIGURE 3
An illustrative circular customer journey

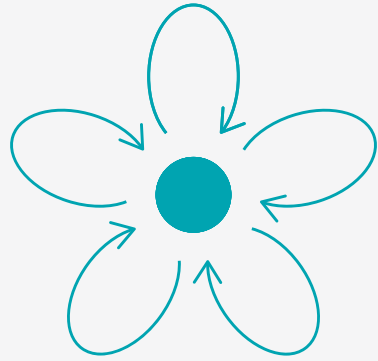


CBMs are new strategies that tap into some recognisable consumer behaviours. In many markets and for decades, formal wear has been rented; groceries have been carried home in reusable packaging; and cobblers, tailors, and laundrettes have been well-used services. These behaviours have also been present in high-tech industries like aviation and manufacturing with the leasing of jet engines, machinery, or tyres. However, in a 'take-make-waste' economy, these models have been marginalised in favour of outright ownership of new products. In a circular economy, new products are still sold, but the emphasis moves towards generating revenue and providing value by keeping products and materials in use for longer.

FIGURE 4
In a circular economy, revenues are decoupled from production and finite resource consumption



There are three main circular business model strategies



Sell access rather than ownership

Rental
Pay per outcome
Sharing



Monetise product life extension

Repair and maintenance
Reuse and refill
Resale
Refurbish and remanufacture

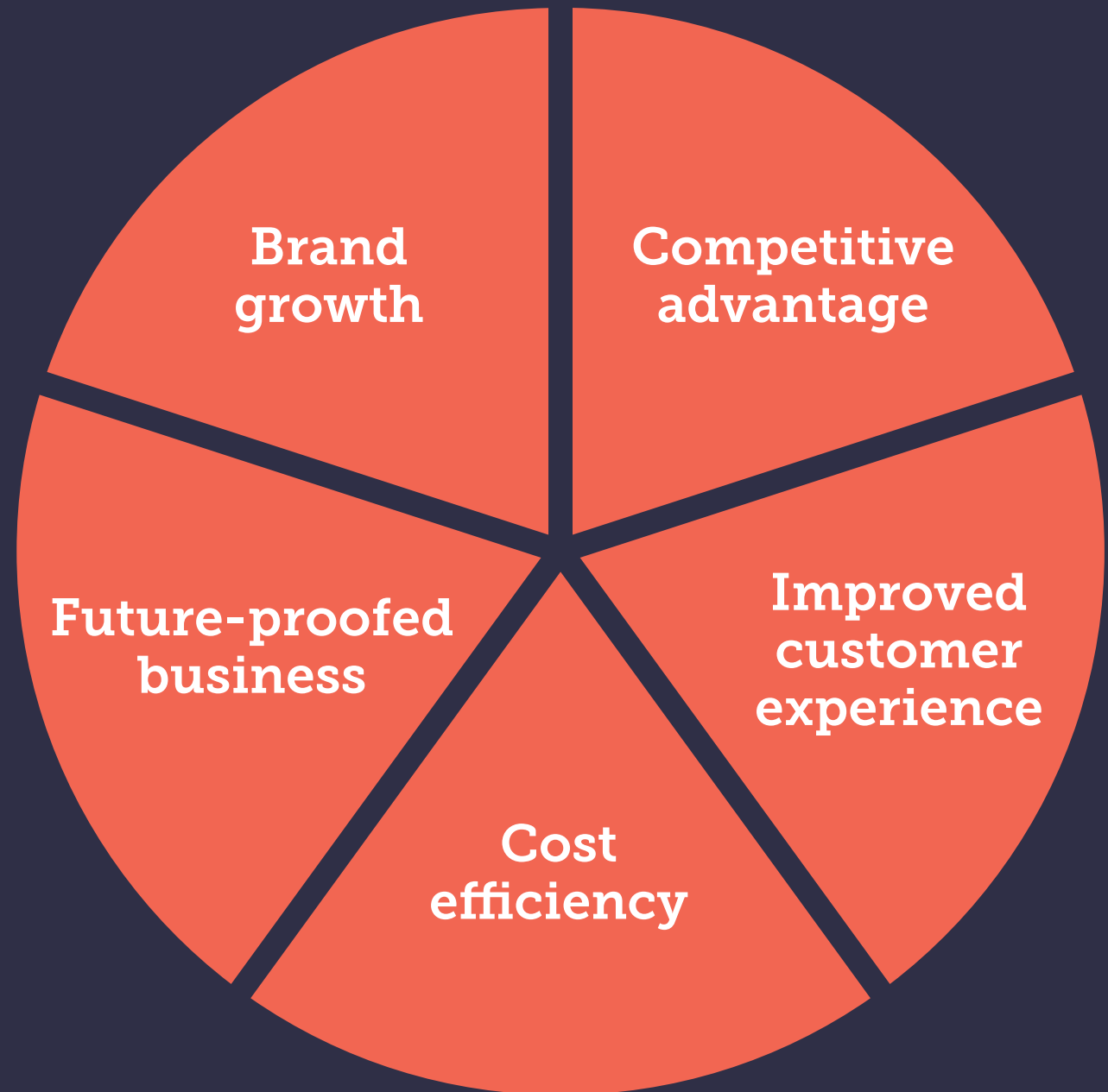


Value circular inputs

Manufacturing with used or by-product materials
Materials and food produced in ways that create regenerative outcomes

A circular economy can help marketing teams deliver against key goals

A circular economy offers a clear pathway for growth and resilience. By embracing circular business models, brands can tap into new revenue streams, reduce costs, and strengthen customer relationships, all while aligning with the demands of a rapidly changing market.



Brand growth

New revenue streams:

Circular business models such as resale, repair, and rental allow businesses to diversify their revenue sources. For example, **Renault** created or preserved EUR 219.8 million in technical and economic value in FY 2019, through the repair and second-life reuse of electric vehicle batteries, the recycling of materials, and the reuse of parts, an increase of EUR 45.7 million compared to 2016. In fashion, 67% of retail executives say resale will generate more than 10% of total revenue for their company within five years.

New markets:

By offering pay-per-use models, refurbished products, or other superior customer offerings, circular strategies make it easier to reach new audiences. UK grocery retailer **Ocado** has reported 29% higher sales on its 2 kg and 1 kg refillable bottles of pasta and rice relative to the same products in smaller single-use plastic bottles.

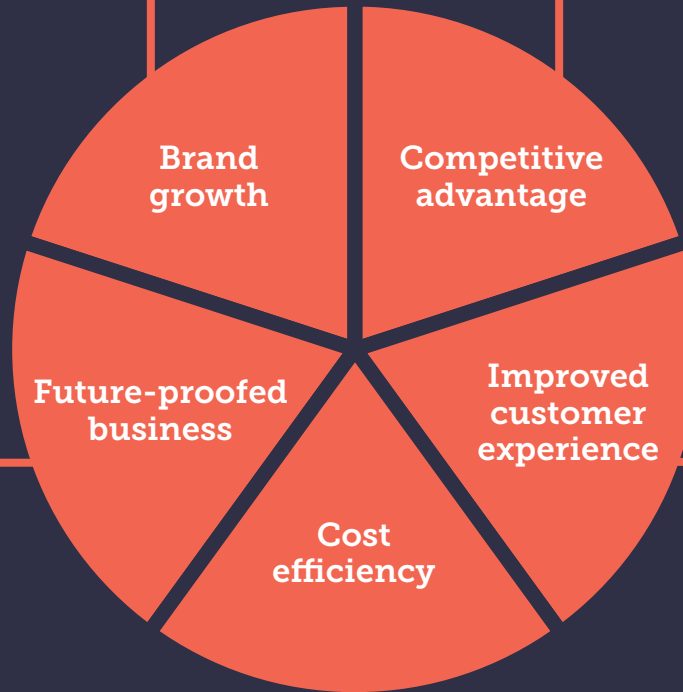
Future-proofed business

Long-term resilience:

Circularity allows brands to meet evolving consumer demands for products with a lower environmental impact and helps comply with new regulations aimed at reducing waste and pollution. Circularity can also mitigate supply chain risks by reducing dependence on scarce raw materials such as the rare earth metals used in EV batteries.

Attract and motivate talent:

Almost 9 out of 10 Gen Z and millennial employees say that having a sense of purpose is important to their overall job satisfaction and well-being. As a solutions framework to global challenges, the circular economy can help increase alignment between brand purpose and employee values.



Competitive advantage

Brand loyalty and differentiation:

Circular solutions encourage customer interaction with brands well beyond the initial purchase. For **Coca-Cola's** reusable universal bottle, lower prices combined with a reward system for returned bottles have resulted in a return rate above 90% and a 15% higher likelihood of repurchase.

Enhancing corporate reputation:

Brands that take meaningful action on environmental and social issues can perform better in terms of corporate reputation, customer loyalty, and brand equity. Analysis from the **Kantar BrandZ database** shows that brands with strong corporate reputations grow their brand value 57% faster than those with weaker reputations.

Improved customer experience

Convenience:

Circular solutions can provide an easier, more efficient, and flexible way to access products. This can range from free repair warranties embedded into subscription models like **Swapfiets' bicycles**, to **SodaStream's in-home appliance** allowing customers to make fresh sparkling water on the spot in the desired quantity and flavour.

Emotional attachment:

Circular services like repair can help people keep their favourite items in use for longer. **Selfridges'** repair revenue growth highlights this ripe circular business opportunity: from GBP 797,286 in 2022 to GBP 1,145,000 in 2023, a 44% year-on-year increase.

Cost efficiency

Resource savings:

Businesses can lower expenses by generating revenue from existing assets, avoiding the need for new production. For example, the total costs per unit of **returnable plastic beverage bottles and personal care bottles** could be 6% and 10% lower than single use, whilst cutting material use by up to 76% and greenhouse gas emissions by 69%.

Marketers have the skills and knowledge to lead their brands' circular journey

Marketers excel at innovation, at bridging the space between brand and consumers, and at collaborating across departments, businesses, and sectors. Capitalising on these skills can supercharge a company's shift to circular business activities.

Marketers can accelerate the adoption of the circular economy in the context of their organisations, by leveraging their ability to:



Understand what a target market wants and needs



Stimulate demand for new products and services



Influence consumption and post-use behaviours



Influence strategic priorities



Strategic marketing skills are really important in boosting the adoption of circular practices. As marketers, we grow our brands by putting consumers at the heart of everything we do, we approach problem-solving in a creative manner, and we're storytellers."

Anne Joly, Sustainability Marketing Director,
Coca-Cola ASEAN & South Pacific

A circular economy also generates wider environmental and economic benefits at a bigger scale

Previous reports by the Ellen MacArthur Foundation have found that applying a comprehensive circular economy approach across sectors at a regional or global level generates system benefits for the economy, society, and nature.



Trillions of USD in annual benefits

can be achieved by 2050 — in the form of net material cost savings and reductions in externalities — in key economic sectors in Europe, India, and China.

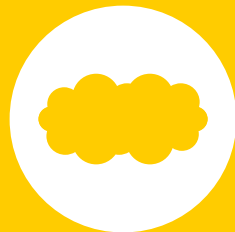
Economy



9.3 billion tonne reduction in CO₂e

can be achieved in five key global industries (cement, steel, aluminium, plastics, and food) by 2050 — the equivalent of eliminating current emissions from all transport globally.

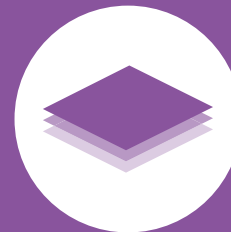
Climate



20-71% reduction in primary material consumption

can be achieved in key economic sectors — such as food, mobility, and the built environment — in Europe, India, and China.

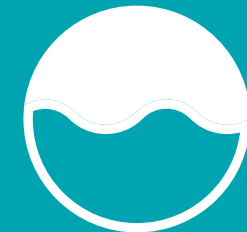
Materials



80% reduction in plastic leakage

can be achieved in the global plastics sector by 2040.

Ocean



Part 2:

Four action pathways for marketers to ignite circular transformation

Already on a circular journey?
Dive in here for new ideas and real-life examples

Four action pathways for marketers to ignite circular transformation

In a traditional linear business model, the role of a marketer is mainly focused on driving potential customers down a traditional marketing funnel towards the point of sale. Once the customer has purchased the product, the marketing job is done — at times, without any consideration of what happens to the product or the customer post-purchase.

In a circular business model, the role of the marketer extends way beyond the point of sale, in both directions. We have identified four action pathways to enable marketers to seize circular economy opportunities.

Create scalable circular solutions

Move from one-off pilots towards core circular revenue generation models



1



2

Drive demand for circular propositions

Move from niche towards mass-market appeal

Make circular behaviours irresistible

Move from transactional towards long-lasting customer-brand relationships



3



4

Hardwire circular KPIs

Move from sales-driven KPIs towards value-focused outcomes

Why is this pathway important?

To reap the full benefits of a circular economy, the transition needs to happen at scale and pace. Finding circular opportunities that are capable of scale makes them commercially viable in the long term, and quickly. Focusing efforts on scalable solutions can rapidly maximise the economic benefit while proving the viability of CBMs to an organisation. This can help embed circularity into core strategy and accelerate the transition.

Marketers can accelerate the adoption of the circular economy in business by collectively reframing action on the transition as a profitable business opportunity. This mindset shift is needed to unlock the necessary resources that marketers need to reach new audience groups and grow their businesses in a way that works for people, planet, and profit. By leveraging their insights on brand, consumers, and market trends, marketers can help identify circular market gaps and develop viable offerings that resonate with consumers while addressing climate and biodiversity challenges.

Circular solutions like rental or reuse can be turned into core revenue streams that can build consumer loyalty and reduce environmental impacts. Lasting relationships can be forged with customers by creating products which appeal to their environmental concerns, reducing customer acquisition costs and creating resilient revenue inflows.

What needs to change?

MOVE FROM

one-off pilots

TOWARDS

core revenue generation models

Create scalable circular solutions



How can marketers accelerate this change?

■ Identify circular transformation opportunities

Marketing teams have access to deep insights into categories, brands, and consumers that can help identify circular business model opportunities. Pilots can prove feasibility and key metrics that provide evidence for future investment. But it is critical to keep scale in mind from the outset to ensure businesses reap all the benefits of the circular economy. Marketers can leverage their skills and knowledge to identify opportunities where circular models can grow into core business activities.

To begin, consider:

- **Friction points:** How can a circular solution address existing consumer pain points?
- **First-mover advantage:** In which markets or categories can you take a leadership role by using circular offerings as a differentiator?
- **Consumer demand:** Are there untapped consumer segments that could be attracted through circular offerings, such as reusable or rental services?
- **Scaling strategy:** Which products are consumers repeatedly purchasing? Where is the mass-scale opportunity for a circular economy?
- **Legislative changes:** In which markets could failure to act on circularity pose a risk to business as usual?

IDENTIFYING THE MARKET POTENTIAL FOR REUSE

DS Smith, an international packaging company and recycling services provider, set the target of testing up to five reuse pilots before 2025. As a result of keeping scale as the ambition of experimentation, DS Smith acknowledges the role of marketing in the early stages of such innovation projects to identify the most commercially viable opportunities:



Marketing participates at an early stage in these reuse pilots to make sure that we're not designing for something that hasn't got the market to exist. So marketing plays a key role in defining where the market exists for reuse. I then see our role as identifying whether we have an industry 'first' or something ground-breaking, and ensuring that we then go on to raise awareness of our involvement in this space and open doors for further (or future) collaboration.

Oliver Brand, Marketing and Communications Lead - Packaging Division, DS Smith



Close the gap between supply and demand teams

Successful scaling of CBMs will require close cross-functional collaboration. Marketers are uniquely positioned to act as the bridge, ensuring that evolving technical capabilities and innovations align with consumer needs. By fostering closer ties between supply and demand teams, products and services can be created that are more desirable and 'stickier' in the marketplace.

SCALING CIRCULAR PILOTS

For years, beer has been transported in large volumes in kegs, yet this isn't the case across the spirits industry, where products travel in a range of packaging formats, including single-use glass bottles.

Inspired by the keg concept, Diageo saw an opportunity to reconsider how they distribute spirits to bars, pubs and restaurants globally. A cross-functional team involving both supply and demand capabilities worked together to identify opportunities – one of which is a partnership with ecoSPIRITS, an industry solution for refilling spirits bottles and reducing single use glass.

This partnership is enabling Diageo to trial distribution of Gordon's, Captain Morgan Smirnoff, and Ketel One, in reusable glass packaging to participating bars and markets. The spirits will be shipped in 4.5 L ecoTOTEs, created to be used up to 150 times. Once empty, the reusable ecoTOTE is collected, cleaned, refilled and sent back to the venue. Each ecoTOTE is expected to eliminate the use of up to 1,000 glass bottles over its lifespan. Diageo aims to pilot this system in an expected 18 markets across the next three years and sees such circular initiatives as a key step towards Diageo's goal of reducing carbon emissions across the supply chain by 50% by 2030 and reaching net zero by 2050.

Diageo is also trialling its first in-house led bespoke circular keg and dispense system for the on-trade, Everpour. Participating sites will trial the technology, which automatically refills dispensing bottles of Smirnoff from large kegs which hold the liquid within the bar environment. Once the keg is empty, it is collected, cleaned and refilled by Diageo before the keg is redistributed to participating bars.



We've achieved real progress through collaborating closely with supply teams and developing brilliant partnerships within the business and across the industry. Circularity cannot be achieved by one function or team alone. Purposeful collaboration is key. When supply-side expertise and demand-side teams come together, it can unlock meaningful opportunities to reduce carbon and improve efficiencies and business resilience. As a marketer responsible for driving progress on our ESG goals, working with supply side colleagues is a critical partnership.

Deb Caldwell, Global Marketing Sustainability Director, Diageo



Image credit: Diageo

Leverage marketing skills to sell the circular vision internally

To make circular solutions scalable, it's essential to gain internal buy-in from key stakeholders. Marketers can use storytelling and insights to illustrate the benefits of circular offerings, tying the outcomes to strategic KPIs like ESG targets, brand growth, and consumer loyalty.

To begin, consider:

- **Seeking buy-in from budget holders:** Emphasise growth opportunities and cost savings
- **Engaging supply chain teams:** Highlight potential material savings and increased efficiency
- **Influencing a retail partner:** Showcase the consumer demand signals and forecasted ROI

Why is this pathway important?

Creating a circular economy requires change at both business and customer levels. Our current economy is engineered for the linear system, with all the negative impacts that it brings. To transition to a circular economy, change is required across the board: not only do businesses need to create viable circular products and solutions, but consumers need to switch to them.

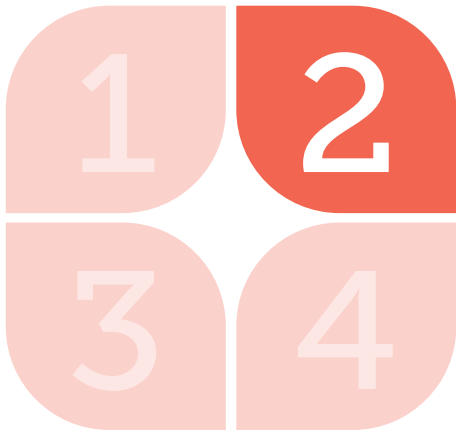
Marketers hold the key within organisations to finding the ‘hook’ to make a circular product or service appealing to the widest possible consumer segment. In many ways this is familiar ground — ensuring that what can be created matches what consumers are willing to pay for. The challenge lies in the fact that these products and services (or their delivery mechanisms) may be unfamiliar, meaning that the marketing communications needs to be carefully designed to explain uses. But the opportunities don't just lie in new products and services. Embedding circular principles into core brand messaging and creative briefs ensure these values are central, driving broader consumer adoption and long-term change.

Because products and services in a circular economy offer consumers the opportunity to use their spending power to counter global challenges, it brings a substantial opportunity for engagement. This engagement can lead to greater brand loyalty and boost revenues.

What needs to change?

MOVE FROM
niche
TOWARDS
mass-market appeal

**Drive demand
for circular
propositions**



You can make the circular economy desirable. If you're not doing it, you're not doing a good job as a marketer.

Simona Azzolini, Sustainability Strategy Director, Futerra

How can marketers accelerate this change?

■ Create benefit-led circular propositions

To reach mass scale, circular solutions need to appeal to a broad consumer base. Although Kantar's ad testing service, [LINK+](#), shows that ads that communicate an environmental message carry more potential to positively contribute to brand equity, such messages alone will not drive behaviour change. LINK+ data shows that factors like convenience, functionality, and experience account for about 70% of brand equity and significantly impact purchase decisions. [Wildfarmed](#), a UK bread and flour brand created to promote the wheat grown by regenerative farmers, is a good example of finding a balance between environmental and functional messages. Its bright green flour packaging proclaims Wildfarmed as 'life-changing flour' and makes the link between environment and flavour with the line "this is our recipe for a more tasty future".

To begin, consider these alternative positioning angles:

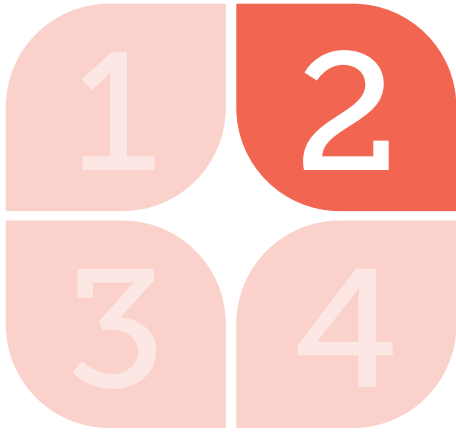
- **Affordability:** Emphasise lower cost of access through rental or refurbished options compared to a new purchase, like [Back Market's refurbished electronics campaigns](#) (see case study).
- **Quality:** Reinforce that circular options do not sacrifice quality, as [Marks & Spencer does with its repair service](#), promoting the durability and quality of its clothing with the line that its clothing is "too good to waste."
- **Convenience:** Focus on ease of use, such as [Swapfiets' bicycle subscriptions](#) that highlight "worry-free" biking experiences on its website and in its campaigns.
- **Emotional attachment:** Highlight the opportunity for consumers to use items they already own for longer. For example by repairing their favourite jumper or repairing tired furniture.
- **Financial savviness:** [47% of consumers](#) say resale value is an important factor in purchasing apparel. Marketers can tap into this by touching on this aspect in marketing communications, reminding consumers of the 'investment' value of their products and encouraging care and maintenance behaviours. Nudie Jeans' [Create Tomorrow's Vintage](#) campaign or Vestiaire Collective's [cost-per-wear](#) messaging are examples of this in action.

LOWER COSTS, SAME QUALITY

Back Market is a global marketplace that gives consumers access to high-quality, professionally refurbished electronics. Its campaigns (see below, and this [video example](#)), often showcase how refurbished items have the same specifications as new products but have a lower consumer price and a reduced environmental impact.

It's a successful formula, attracting [more than 13 million customers](#) and annual sales of EUR 320 million in 2023. The brand has been growing steadily since its 2014 launch and is now present in 18 countries including many markets across Europe, as well as in the US, Japan, South Korea, and Australia.

[Click here to view a Back Market campaign](#)



Tap into positive emotions and humour to craft relatable circular narratives

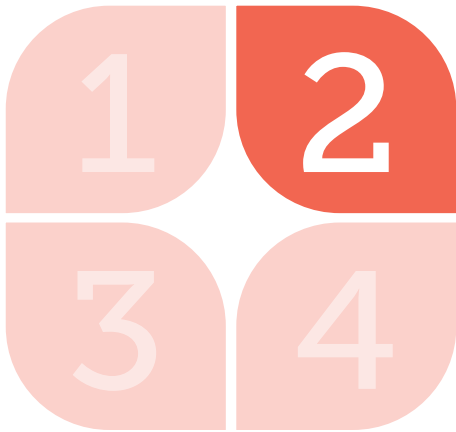
Where relevant, environmental messaging can be a driver of consumer demand. [Kantar research](#) has discovered that both high-performing and low-performing environmental- or social-led campaigns evoke guilt to a similar degree. However, top-performing ones leave consumers feeling positive after acknowledging global or local challenges. Humour can also lead to much higher engagement and help educate. Communications that leave people feeling hopeful and confident are key to making people feel empowered to become part of the solution.

PLAYFUL EXECUTION

SOJO is a startup on a mission to fix the fashion industry by modernising clothing alterations and repairs. Their recent Out Of Home (OOH) marketing promotion in London used an eye-catching campaign to playfully depict the consumer realities of well-worn clothes, promoting the benefits of a door-to-door repair service. The ads encourage consumers to make an investment in their existing clothing, displacing the need to produce new items.



Image credit: SOJO



■ Leverage cultural moments to reach mass markets

Cultural moments such as TV shows or music trends have the potential to capture diverse, large-scale audiences, offering a unique opportunity for brands to introduce circular economy principles to more market segments, beyond the environmentally-minded. Such events create lasting impressions and influence public attitudes far beyond the event itself. Weaving circular narratives into these significant events can help customers resonate emotionally and elevate the circular economy to become a shared societal value, bringing normalisation and reinforcing circular behaviours.

NORMALISING PRE-LOVED FASHION

In 2021, eBay UK entered a partnership with the popular UK reality TV show Love Island.

eBay leveraged a cultural event to position pre-loved fashion as a credible, stylish, and cost-effective alternative to fast fashion. As the partnership evolved, eBay became the headline sponsor, driving the message across multiple seasons and integrating the pre-loved fashion theme throughout various touchpoints, including social media, TV ads, and the show itself.

Key to the success of this initiative was eBay's focus on the primary motivators for their audience, such as affordability and uniqueness. This subtle positioning proved crucial in driving demand for circular fashion, as it resonated with viewers' desires for value and style, while gently introducing them to the benefits of second-hand clothing. The results were overwhelmingly positive: achieving a 7000% increase in searches for 'pre-loved fashion' on eBay after the first season of the partnership in 2022, and with pre-loved fashion listings in 2023 rising by almost 20% year on year.

The collaboration also allowed eBay to build strong brand equity, receiving recognition not just from consumers but also from industry players, further positioning the platform as a leader in the pre-loved fashion space. This partnership helped eBay UK recruit new sellers — reporting a 24% uplift of circular businesses joining the platform in the first five months of 2023 — and forge partnerships with fashion brands, unlocking new business opportunities and broadening their customer base.

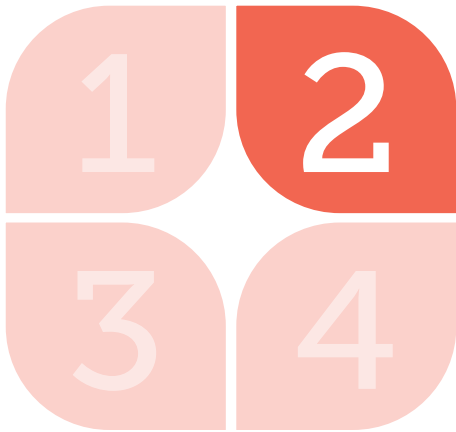


We wanted to drive broad adoption of pre-loved shopping behaviour, and by partnering with Love Island — an iconic show synonymous with fast fashion — we were able to create a cultural tension that made pre-loved fashion exciting and relevant to a mass audience.

Toby Foy, Head of Brand, eBay UK



Image credit: eBay



1 Normalise circular lifestyles across prominent brand platforms

By embedding a circular economy narrative into core brand messaging and major brand campaigns, marketers can make circular choices and behaviours the default message. Circular narratives can be woven into the largest brand platforms — dialled up or down where appropriate — such as Bosch's global [#LikeABosch](#)

campaign, which included platform variant 'Live sustainable' showcasing circular lifestyles via its kitchen and garden appliance activations. When marketers reinforce circular principles within the core brand experience, beyond 'good for planet' activations, it can make circularity more accessible and accelerate behaviour change.

INTEGRATING CIRCULARITY WITHIN THE CORE BRAND EXPERIENCE

Since 2013, Apple's trade-in programme has played a significant role in normalising circular lifestyles. By providing a trade-in option across the majority of its product lines, Apple has encouraged customers to adopt a more circular approach to technology consumption.

Apple also uses accessible language to explain what happens to the product after trade-in: "If your device is in good shape, we'll help get it to a new owner. Or, if it's seen better days, we can recycle it for free."

The programme provides customers with a convenient and valuable way to dispose of their old devices while receiving credit towards new purchases. Apple has integrated the trade-in program into its core brand experience in a way that is relevant to the company.

[Click here to explore Apple's trade-in programme](#)

2 Place circular KPIs in creative briefs

Marketing communications have a powerful role to play in normalising circular consumer behaviours aimed at extending the life of products. By embedding metrics that incentivise circular activities into the creative briefing process, marketers can ensure that the circular economy is a central objective in both creative execution and performance measurement. This helps align the creative agency partner, the brand's communication efforts, and the parent company's broader operational vision of a circular future.

To begin, consider adding specificity in creative briefs on the way in which you portray everyday behaviours. For example:

- A consumer repairing a broken product instead of buying the same product again new.
- A consumer buying second-hand clothes instead of new.
- A consumer composting instead of putting food waste in a bin.

Why is this pathway important?

Transitioning from a system that facilitates waste and pollution to a circular economy requires behavioural change. According to Kantar's [Sustainability Sector Index](#), 93% of people globally want to make more choices that have a positive environmental and social impact across sectors, but only 10% are actively changing their behaviour due to various barriers like cost, inconvenience, and access.

Marketers can help remove barriers to circular behaviour adoption.

Within sectors that commercialise products with longevity of use, including white goods, electronics, and clothing, a circular strategy can focus on enabling consumers to take on more of a 'stewardship' role over a product to keep it in use for as long as possible. This is where activities like repair, resale, and product-as-a-service models can be used as a way of maintaining consumer loyalty and supporting buyers to care for products, building brand loyalty in the process. Within the FMCG sector, the task for marketers is more about finding ways to avoid waste and pollution in the production and distribution of goods by, for example, [promoting packaging reuse](#), [avoiding problematic materials in packaging](#), and [using production techniques that regenerate soil, air, and water](#).

Marketers who design and promote circular behaviour touchpoints into their customer journeys have a lot to gain: from improving brand trust and consumer loyalty, to reducing customer acquisition costs, or opening new avenues for revenue generation.

What needs to change?

MOVE FROM

transactional

TOWARDS

long-lasting customer-brand relationships

Make circular behaviours irresistible



How can marketers accelerate this change?

■ Map out linear customer journey pain points

By charting the current, linear path-to-purchase touchpoints, customer interaction points can be identified. Understanding when and how customers interact with a brand helps reveal ‘linear’ friction — for example, instances where a product, material, or customer value is lost, such as product maintenance and disposal — and provides the opportunity to replace those moments with circular alternatives like service extensions, repairs, upgrades, reuse, or recycling options.



Today, storytelling stops at the counter. How can we create a circular relationship with the buyer instead of a linear one? How can we make sure that the moment at the counter where a product is bought, it is not the end of everything?

Sascha Bloemhoff,
Marketing Director, Niaga



In a linear economy, the marketer’s main goal is to get the product sold and there’s a world of opportunity after the point of sale that often gets ignored.

Nicole Rigas,
Vice President of Marketing, EON

FIGURE 5
Example of a linear customer journey





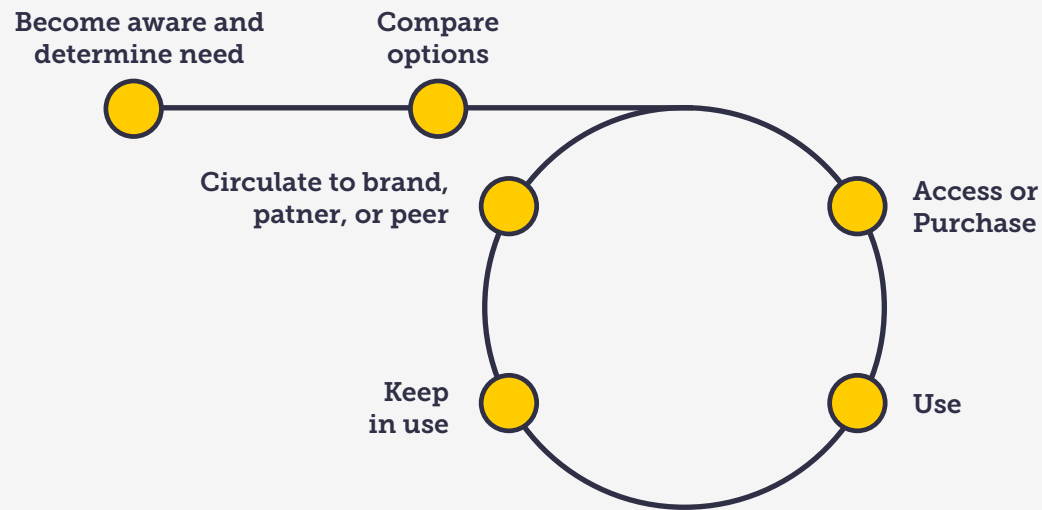
Explore the potential for circular customer experiences and touchpoints beyond point of sale

Consider how customers can be re-engaged beyond the initial consumption or purchase by finding ways to extend their relationship with a brand or product after the initial transaction. This could be by offering product maintenance or upgrade services, encouraging product returns for refurbishment, or providing educational content to help customers maximise product use. CBMs where the brand retains ownership over the

product, such as On Running's shoe subscription model, lend themselves to this long-lasting relationship with the customer more easily. However, options are also open in traditional sales-based models. For instance, Ganni partnered with Sojo to offer a free repair and alterations service to “make it effortless and fun for...the GANNI community to give our clothes a longer life”.

When products are not disposed of, customers can be engaged across more touchpoints over a longer period. These moments of re-engagement allow marketers to create additional value for the customer and the brand, but also to ensure that sufficiently high volumes of products and materials are kept in circulation for the business model to remain profitable.

FIGURE 6
Example of a circular customer journey



What information does this product need to carry in order to be bought, to be cherished, cleaned, maintained, and then at some stage repaired, refurbished, and in the end recycled?

Sascha Bloemhoff,
Marketing Director, Niaga



Make use-phase circular behaviours easy and rewarding

To encourage long-term circular behaviours, it’s essential to address the barriers that consumers face in keeping products in use for longer. While price and accessibility are important at point of sale, convenience plays a crucial role in fostering post-sale circular actions like maintenance, repair, and returns. Marketers can streamline these processes, making them easy and rewarding for consumers. This could involve simplifying the spare parts order for refurbishment or used product return process for recycling, providing accessible repair services, or offering clear instructions on product care to extend lifespan.

MAKING CIRCULAR CUSTOMER JOURNEYS ACCESSIBLE THROUGH TECHNOLOGY

In 2023, Coach launched Coachtopia: a sub-brand focused on circular craft, youth, and creativity. The fashion brand partnered with start-up EON to embed each item with a unique Digital ID with the goal of providing lifecycle transparency, making CBMs accessible, and supporting on-product authentication.

By scanning an NFC tag on their product, Coachtopia customers can access product details and environmental impacts, and guarantee their item’s authenticity. This digital passport brings a number of benefits: for example, damaged bags can easily be repaired by using a Digital ID to access repair services via a Coachtopia account; while if the item is no longer needed, the Digital ID can make it easier for the consumer to instantly list an item on a resale platform such as Vestiaire Collective. EON suggests that this could eventually include a mechanism for attributing royalties back to brands and create a link to the new owner even after a product changes hands. Throughout the journey, as items are repaired and reused over multiple lives, the digital passport records each step and guarantees their authenticity — improving the experience for customers looking to acquire real Coach items.



In a circular economy, the conversion metric moves beyond first sale. Now there are multiple conversion moments across the product lifecycle and the marketer’s goal shifts to a focus on lifetime value. That’s the biggest unlock for retail’s sustainable future — generating more value from the same products versus making more things.

Nicole Rigas,
Vice President of Marketing, EON

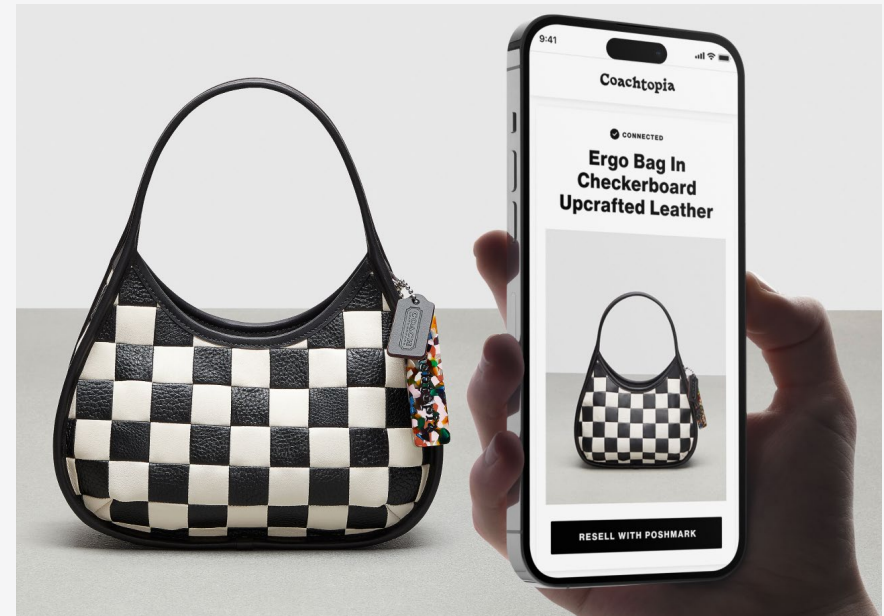


Image credit: EON



Incentivise post-use returns

Experiment with reward structures to identify how to incentivise the consumer to create or maintain a post use circular behaviour like resale, return, or recycling. For example, explore how brands could easily and meaningfully reward consumers who return packaging for a refill and keep using the service. In Denmark, TOMRA, Visa, and Shift4 have partnered to enhance consumer convenience of the reverse vending machine experience by implementing a fully digital payment process for reusable packaging returns. Through this system, customers can receive instant refunds directly to their contactless cards, eliminating traditional barriers like paper coupons.

REWARDING CIRCULAR CUSTOMER BEHAVIOUR POST-USE

IKEA’s Buyback & Resell scheme uses financial rewards, quality-oriented statements, and humour to encourage customers to extend the life of IKEA items (see right and this video example). By offering customers the opportunity to sell their used IKEA furniture back to the brand for a fraction of their initial investment, IKEA enables people to become active participants in the circular economy and offers a range of lower priced second-hand items for those who are looking to buy second-hand IKEA furniture.

Buyback & Resell started as an alternative to Black Friday: tapping into a big consumer moment to achieve a high volume of returns. Now, it is an always-on offer that is used in most markets. Customers in 28 countries can bring back IKEA products they no longer need to one of the stores and receive an IKEA voucher to spend in-store or online. Over 211,600 customers used the service in FY23.

IKEA has since evolved its second-hand offer, most recently launching a peer-to-peer resale platform called IKEA Preowned in Madrid and Oslo in 2024.



Why is this pathway important?

To transform business practice, teams need to be incentivised to make the shift. KPIs provide a valuable tool to help measure, monitor, and manage change. By providing insights, for example on resource use, carbon emissions, and consumer uptake, they can drive internal action while also providing accountability for circular claims.

Marketers can support the shift to circular business practices by integrating circular targets into performance objectives. Delivering circular outcomes can be challenging for marketers who have inherited linear metrics focused on short-term growth and sales. By recasting KPIs to include circular measures such as customer lifetime value and proportion of revenue from CBMs, activities can be linked more directly to strategic circular goals.

Circular KPIs can help marketers focus efforts on the most impactful action areas while retaining customers and building increased conversion and sales opportunities. By integrating circular measures into brand performance, marketers can track and build, over time, a clear picture of how circular efforts are positively contributing to broader business objectives such as brand growth, business resilience, and climate action.

What needs to change?

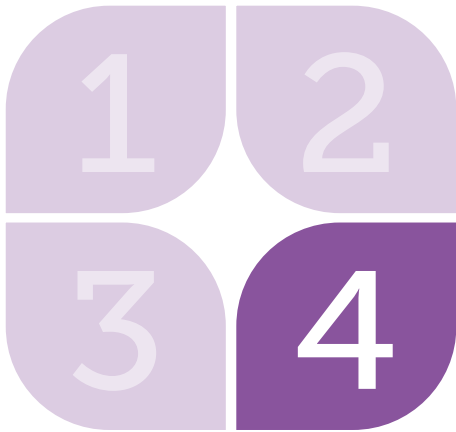
MOVE FROM

sales-driven

TOWARDS

value-focused
outcomes

**Hardwire
circular KPIs**



How can marketers accelerate this change?

■ Build a circular revenue baseline and targets

Determine the percentage share of sales and revenue that is currently derived from circular products — and seek to benchmark this versus the competition. Revenue- and sales-related metrics help emphasise the economic value of circular offerings and make their potential easier to understand by commercial teams. Such metrics can then be used to set measurable targets.

N.B. Sales can be leveraged as a positive metric when looking at the proportion of revenue generated by circular services or products that decouple production and consumption from the extraction of virgin materials.

Some examples of companies that have already used similar metrics to set circular KPIs include:

- Philips expanded its circular revenues to 20% of sales in 2023, up from 18% in 2022, with the ambition to reach 25% by 2025.
- Syensqo aims to increase the share of sales enabling circularity for customers to 18% of total net sales in 2030 (versus 12% of sales in 2021).
- Selfridges committed to making 45% of transactions circular¹ by 2030 (versus less than 1% in 2022)

■ Include a relevant imagery statement in brand trackers

By including an imagery or attribute statement linked to circular activity, marketers can understand the impact the circular workstream is having on brand equity. Through this approach, it is possible to demonstrate how circular economy action is a meaningful lever for brand building and an enhancer of category fundamentals like improved functionality, taste, or quality.



Quantifying the effect of the circular economy on how consumers perceive your brand can help drive change through the whole business. If you can't measure it, you can't change it.

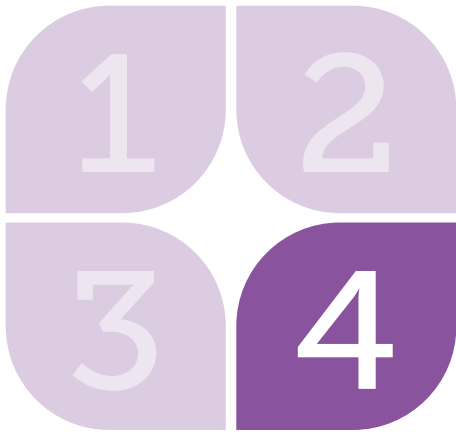
David Yates,
Founding Partner (CX), Uncommon Creative Studio

■ Add circular marketing performance incentives

Make annual performance evaluations and incentives of marketing teams, such as bonuses, contingent upon circular economy targets and KPIs, and reward circular economy initiatives. This approach encourages and rewards behaviours that contribute to the adoption of circular economy principles, and can transform the circular economy from a passive consideration into an active driver of employee behaviour.

Example: CHEP, A Brambles Company, links organisational circular economy targets to employee incentives through, for instance, tying bonuses to their Asset Productivity target, which refers to how many assets are kept in circulation to prevent the need for new products.

¹ A circular transaction includes at least one resale, rental, refill, repair, or recycled product and excludes home, food, and restaurants.



■ **Identify what success looks like for a given circular business model**

Good performance can look very different in CBMs compared to linear counterparts, since the focus shifts away from pure product sales to alternative value propositions. Explore what good looks like for each circular business model. For example, in a linear model businesses can measure success just by sales volumes. However, in a circular business model this crude measure will not account for increased profit margins or related benefits, such as improved consumer experience, reduced costs, or increased brand loyalty.



We often talk about the hidden costs of our wasteful linear economy: disposition fees, storage fees, tipping fees, energy costs, etc. But what about the hidden value of the circular economy? Circular KPIs are typically aligned to some sort of Return on Investment Capital (ROIC) – for example, optimising for resource reuse, product longevity, and waste reduction throughout the product lifecycle. But success can run even deeper than this. Success can be tied to the addition of new revenue streams from secondary markets through extending product lifespans, which boosts brand reputation. Industry leaders are even starting to list revenue through circular initiatives in their annual reports as a key differentiator.

Tom Fecarotta, Head of Marketing Communications, Rheaply

■ **Seek value-focused outcomes**

In a circular economy, products may not be sold once, but multiple times. This enables businesses to generate more revenue from one item. Consider switching from short-term sales-focused metrics to measure product or consumer lifetime value – and the knock-on implications for communications measurement.



In the future each product won't just be sold once, it will be sold a number of times and have services embedded like repair or upgrades that enable you to generate more revenue from the same item

Nicole Rigas,
Vice President of Marketing, EON

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Acknowledgements

The Ellen MacArthur Foundation and Kantar would like to thank the following organisations who contributed to the study for all their constructive input.

- | | | |
|---------------------------------|--------------------------------|-----------------------------------|
| Amazon | Futerra | Ralph Lauren |
| ASOS | GUCCI | Reckitt |
| Burson | H&M | ReLondon |
| CHEP, A Brambles Company | Hubbub | Rheaply |
| The Coca-Cola Company | Imperial College London | SAP |
| Danone | JLR | Syensqo |
| Diageo | LACOSTE | Uncommon Experience Studio |
| DS Smith | Marimekko | Visa |
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About the Ellen MacArthur Foundation

The Ellen MacArthur Foundation is an international charity that develops and promotes the circular economy in order to tackle some of the biggest challenges of our time, such as climate change, biodiversity loss, waste, and pollution. We work with our network of private and public sector decision makers, as well as academia, to build capacity, explore collaborative opportunities, and design and develop circular economy initiatives and solutions. Increasingly based on renewable energy, a circular economy is driven by design to eliminate waste, circulate products and materials, and regenerate nature, to create resilience and prosperity for business, the environment, and society.

Further information:

ellenmacarthurfoundation.org

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Kantar is the world's leading marketing data and analytics business and an indispensable brand partner to the world's top companies, including 96 of the world's 100 biggest advertisers. We combine the most meaningful attitudinal and behavioural data with deep expertise and technology platforms to understand how people think and act, globally and locally in over 90 markets. Kantar, a Network Partner of the Ellen MacArthur Foundation, has a dedicated team of experts in our Global Sustainable Transformation Practice working at the intersection of people, brands, and sustainability. The practice works with over 800 brands, providing actionable advice and consultancy on sustainability and circularity, equipping our clients with the knowledge, insight, and data to progress away from a 'take-make-waste' system, whilst managing risks and opportunities posed by environmental and societal disruption.

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