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DELIVERABLE 2.3

Media Planning Report

Zenith Poland

28/11/2025



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This work is dedicated to the memory of Justina Baršytė, our project coordinator, whose vision and commitment were invaluable to this project.

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Executive Summary

This report provides a comprehensive analysis of sustainability-focused advertising within the food sector across Poland, Lithuania, Estonia, and Romania from 2022 to 2024. The primary objective is to evaluate current brand communication strategies, media investments, and emerging trends related to sustainability messaging in offline media, including television, radio, press, and out-of-home (OOH) advertising.

The analysis indicates that sustainability has transitioned from a peripheral theme to a central element in food marketing, with varying degrees of maturity across the studied markets. Poland and Estonia lead in integrating sustainability narratives, leveraging both traditional and digital channels, while Lithuania and Romania are emerging markets with growing adoption of ecological and responsible messaging. Across all markets, television and OOH remain essential for reach, whereas digital platforms increasingly drive engagement, authenticity, and localised storytelling.

Key insights include the growing importance of sustainability as a brand differentiator, the necessity of a balanced media mix, and the critical role of transparency, local sourcing, and eco-friendly practices in shaping consumer perception. The report concludes with strategic recommendations for brands to maximise the impact of sustainability communication, combining long-term commitment, credible data, and innovative digital engagement.

1. Introduction

1.1 Purpose of the report

The primary objective of this report is to provide a comprehensive analysis of the advertising landscape for food products with a sustainability focus across selected European markets. The report seeks to assess the current state of communication strategies adopted by brands in the food sector, identify key trends in sustainability-oriented messaging, and evaluate the evolution of media presence within the specified timeframe.

1.2 Background

Sustainability has emerged as a defining priority within the global food industry, shaping both consumer expectations and corporate communication strategies. Increasing public awareness of environmental and ethical issues has prompted brands to adopt a more transparent and responsible approach to marketing. In Europe, this transformation has been reinforced by evolving regulatory frameworks and the growing demand for sustainable products.

In European markets, food brands have been progressively integrating sustainability into their brand positioning. Key communication themes include local sourcing, waste reduction, the promotion of plant-based alternatives, and the reduction of carbon emissions. These shifts reflect a broader trend in which sustainability is becoming a key differentiator and a fundamental expectation among consumers..

1.3 Methodology

1.3.1 Data Source

Kantar Media is a global leader in media intelligence and advertising monitoring, providing comprehensive datasets covering paid media activity across television, radio, press and out-of-home channels. Their systems collect and standardise reporting on advertising spend, creative executions and media placements, ensuring high comparability between markets and over time. Data used in this report come from Kantar Media's validated monitoring panels, offering reliable month-by-month spend allocation and full coverage of offline media activity.

1.3.2 Scope of Quantitative Analysis

The quantitative component of this report covers offline media only (TV, radio, press, OOH). Monitoring of online advertising differs significantly across markets and remains incomplete, as available tools do not fully capture all digital inventory or programmatic environments. Therefore, online media data could not be used as a reliable quantitative source.

However, to ensure a holistic understanding of sustainability communication across the full media ecosystem, insights related to online advertising were incorporated qualitatively, through discussions

and observations from focus groups, where participants reflected on digital sustainability messaging and brand behaviour online.

The analysis conducted for this report is based on a robust dataset and a consistent methodological framework aligned with TealHelix sustainability classification standards.

1.3.3 Dataset Scope

A total of 64,000 advertising creatives were analysed across the four markets (Poland, Lithuania, Estonia, Romania) in Food Category.

1.3.4 Media Spend Accounting Principles

Media investments were analysed based on:

- the date on which the spend was incurred, not solely the campaign start or end date;
- the medium in which the spend occurred (TV, radio, press, OOH);

This ensures comparability across markets and alignment with Kantar Media reporting formats.

1.3.5 Classification of Sustainability-Related Advertising

Creatives were classified as sustainability-related when they contained visual or verbal references to one or more sustainability dimensions defined in the *TealHelix – Description of Sustainability Indicators (April 23, 2025)*:

- **Environmental** — environmental protection, ecological impact, resource reduction, emissions, recycling, packaging.
- **Social (Health)** — consumer health, nutritional claims with social benefit components.
- **Social (Worker Conditions)** — fair labour practices, ethical production environments.
- **Animal Welfare** — humane treatment of animals, improved farming standards.
- **Economic** — support for local economies, fair pricing structures, responsible sourcing.

Only creatives meeting at least one of these criteria were included in the sustainability-related subset.

2. Market Overview

2.1 Poland

The Polish advertising market remains one of the most dynamic in Central and Eastern Europe, with sustained growth across both traditional and digital media channels. Television continues to represent the largest share of advertising expenditure, although its dominance has gradually declined in favour of online formats.

In the context of sustainability, communication remains at an early but steadily developing stage. Larger global players have already integrated environmental narratives into their campaigns, while local brands are increasingly following suit, particularly in categories such as plant-based and organic products. Consumer awareness of sustainability issues is rising, creating opportunities for deeper message integration.

2.2 Lithuania

The Lithuanian advertising market is smaller but well-developed and characterised by strong digital adoption. Sustainability is an emerging theme, with growing emphasis on ecological packaging, local production, and reduced waste. Digital platforms, especially social media, are increasingly used to reach younger, environmentally conscious audiences.

2.3 Estonia

Estonia is one of the most digitally advanced markets in the region. Digital advertising has overtaken traditional media, and consumers demonstrate high environmental awareness. Food brands in Estonia integrate sustainability messages focusing on local sourcing, energy-efficient production, and eco-friendly packaging. While overall advertising volume is moderate, the quality and consistency of sustainability communication are notably high.

2.4 Romania

Romania's advertising market continues to experience stable growth, driven by increased consumer spending and investment from multinational brands. Television remains dominant, though digital channels are gaining importance. Sustainability communication is still developing, often framed around natural ingredients, freshness, or recyclable packaging. The growing middle class and EU regulatory alignment are expected to accelerate progress in the coming years.

2.5 Summary

Across all analysed markets, sustainability has evolved from a peripheral topic to an increasingly relevant component of food advertising strategies. Market maturity and communication intensity vary, with Estonia and Poland showing the most advanced integration of sustainability themes, while Lithuania and Romania continue to develop in this area.

Key insights:

- **Growing importance of sustainability:** Sustainability is increasingly shaping brand narratives and creative direction.
- **Poland as a regional benchmark:** Balanced development between traditional and digital activity.
- **Baltic markets driven by digitalisation:** Estonia leads in message sophistication.
- **Romania's emerging potential:** Increasing visibility supported by EU policy and middle-class growth.
- **Traditional media still matter:** TV and OOH remain crucial for reach despite digital expansion.

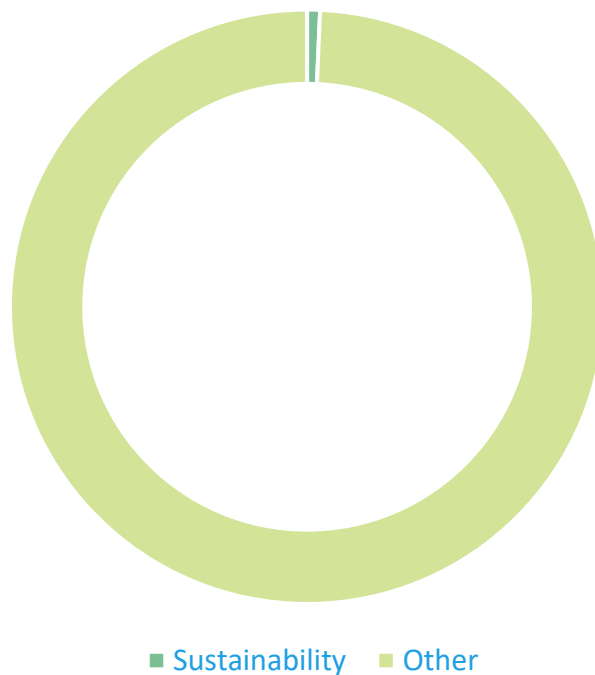
3. Media investment analysis

3.1 Overall media landscape

Between 2022 and 2024, the analysed markets demonstrated steady but uneven growth in total media investment within the food category. Television and OOH remain the dominant channels, though digital media are gaining prominence, particularly in Estonia and Lithuania. Economic fluctuations, including periods of high inflation, influenced overall budgets, but the food sector has generally remained resilient due to its essential nature.

3.2 Sustainability-related advertising

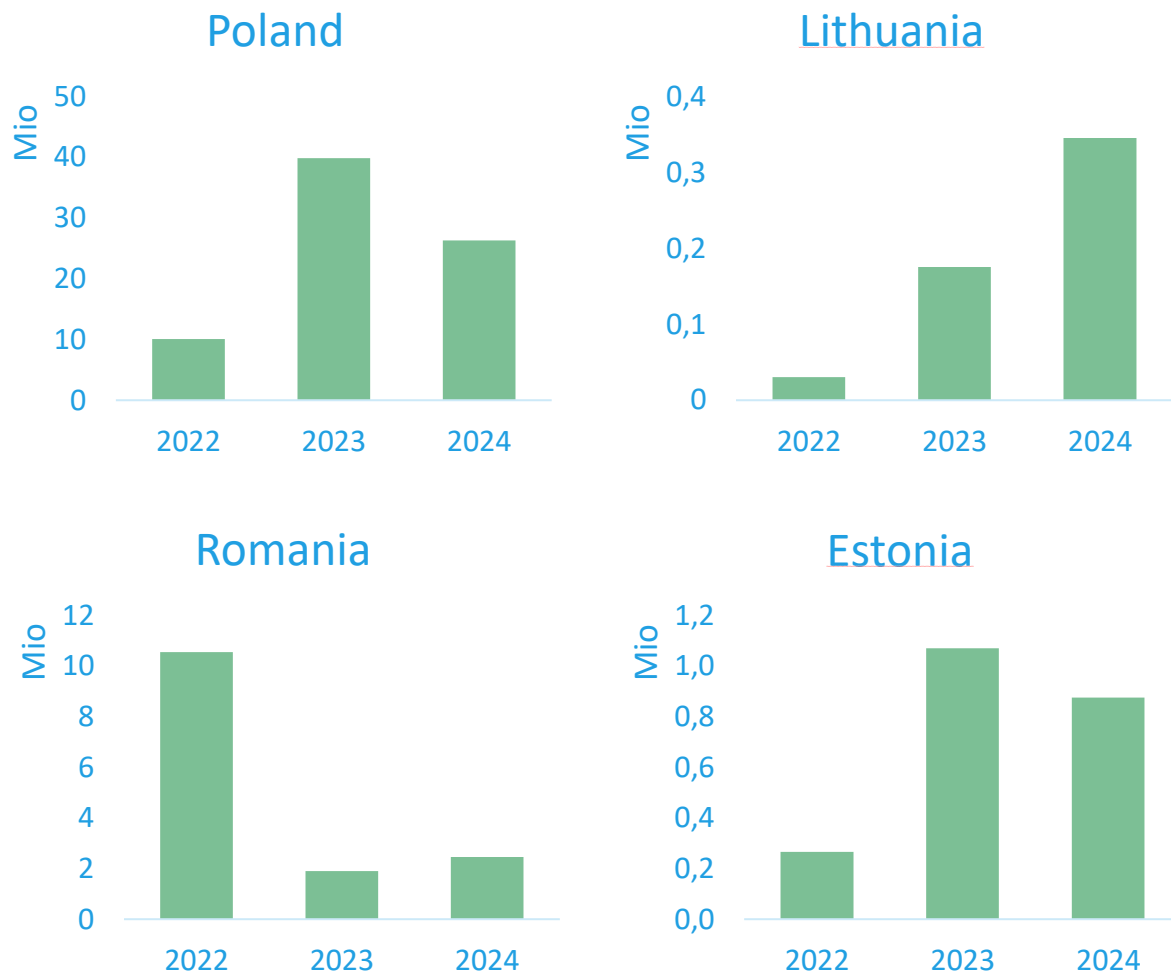
Figure 1: Share of Sustainability-Related Advertising Spend (2022–2024)



Source: Kantar Media (offline monitoring), 2022–2024

Sustainability-focused advertising continues to represent a relatively small proportion of total media investment. The share of spending on sustainability-related campaigns was observed at approximately 0.7% of total Share of Spend (SOS) through the years in Poland, 0.5% in Lithuania and Romania, and 0.9% in Estonia. In Poland, this share has remained close to just 1% over the analysed period, exhibiting year-to-year fluctuations without a clear upward or downward trend.

Figure 2: Sustainability-related advertising spend by year and market



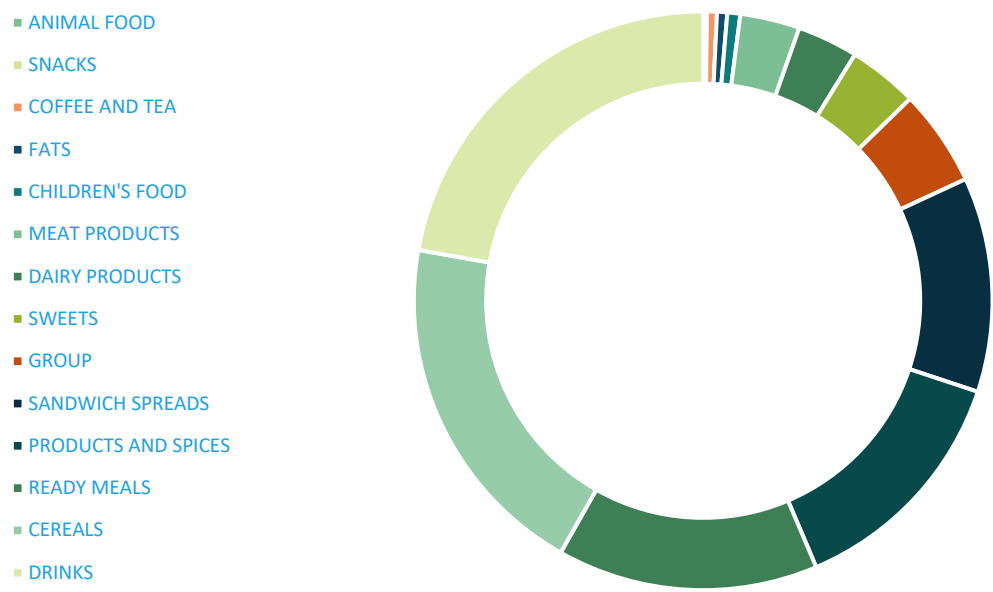
Source: Kantar Media (offline monitoring), 2022–2024

The modest level of investment may reflect multiple factors. In 2023, many countries, including Romania, faced elevated inflationary pressures, which may have prompted companies to reduce expenditures, including marketing budgets. Advertising for sustainable food products, often associated with premium positioning, may have been deprioritised relative to core product campaigns.

However, 2024 shows a notable increase in sustainability-related media investment in Lithuania, correlating with the implementation of the EU Corporate Sustainability Reporting Directive (CSRD) and the expansion of Environmental, Social and Governance (ESG) reporting requirements.

Across all markets, certain product categories are more likely to incorporate sustainability messaging. In particular, cereal products and beverages dominate among products featuring references to sustainable development on television, reflecting both consumer interest and brand strategies in these categories.

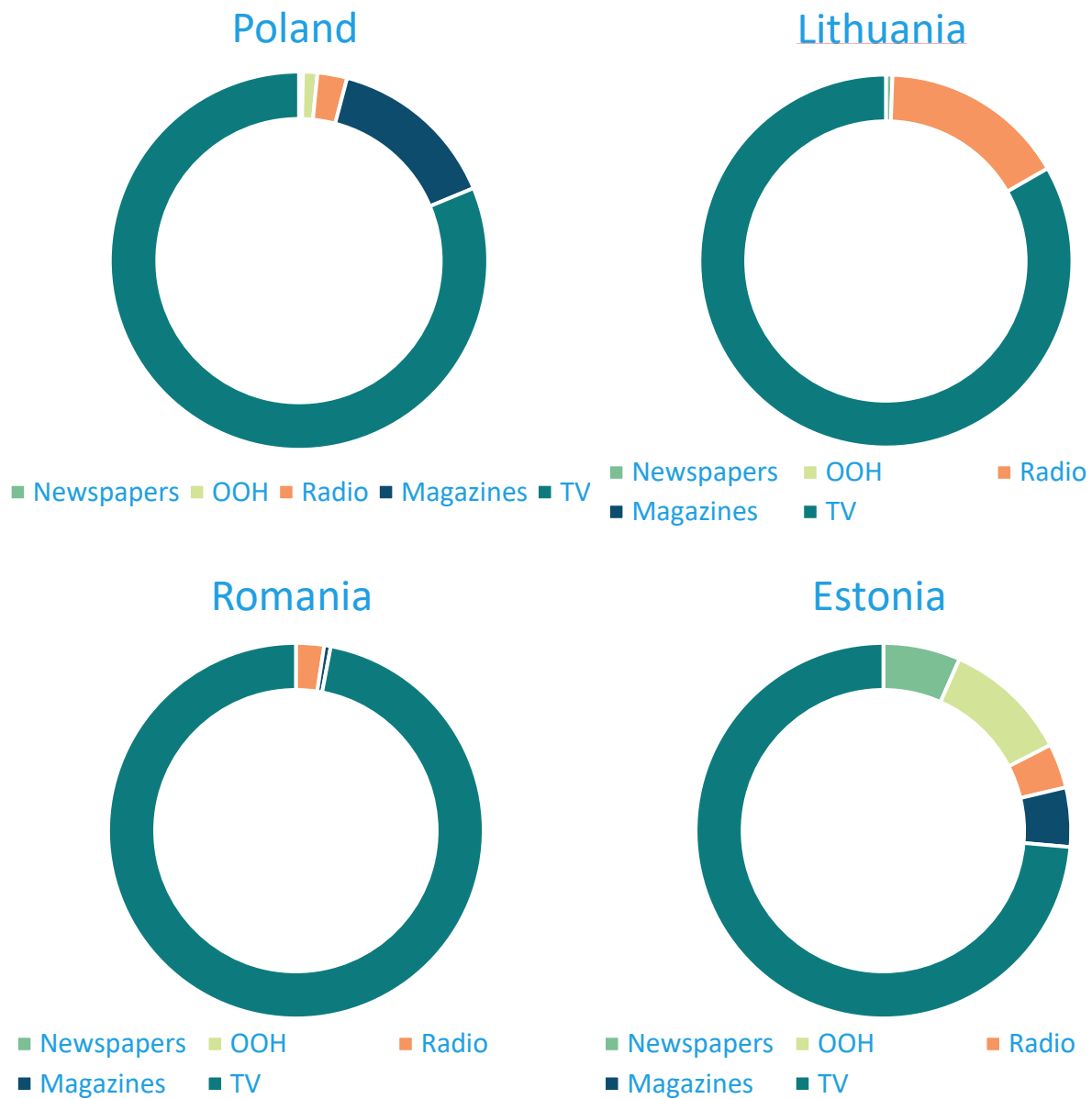
Figure 3: Sustainability-related ads by product category across markets



Source: Kantar Media (offline monitoring), 2022–2024

In food advertising campaigns across Poland, Romania, Lithuania, and Estonia, the media mix remains strongly dominated by traditional channels, particularly television, despite the growing importance of digital platforms. In these markets, TV continues to serve as the primary medium for building brand awareness and trust, which is especially relevant for food products and sustainability-related messaging that require credibility and broad reach. While social media and online video increasingly complement campaign strategies, their share in overall spending is still relatively modest. This is reflected in the analysis of sustainability-focused advertisements, which shows that television accounts for between 74% and 97% of offline media expenditures in different countries.

Figure 4: Mediamix of Sustainability-related Ads across country



Source: Kantar Media (offline monitoring), 2022–2024

3.3 Market-specific observations

Poland: Sustainability-related investment remains steady, without a distinct trend, despite high overall media expenditure.

Lithuania: Clear upward trajectory in 2024, linked to regulatory developments and increased ESG focus.

Estonia: Highest proportion of sustainability-related media investment among the analysed countries.

Romania: Limited but stable share of sustainability-focused campaigns; growth may be constrained by cost sensitivities and prioritisation of core product marketing.

3.4 Sustainability messaging and content

Analysis of sustainability-related advertising indicates that certifications play a central role in brand communication. The primary certification communicated is the EU organic logo, commonly referred to as the "green leaf." They are often additionally described in communication as organic or 'bio' products. In some cases, techniques are used to draw the consumer's attention to the certification, such as pointing directly at the certificate on the packaging or additionally featuring the certificate in the creative materials.

Examples:



Despite this emphasis, issues related to organic or ecological farming are generally not positioned as the main consumer benefit, except in specific product categories where such qualities are particularly valued by the target audience, such as baby food.

Many campaigns receive support from the Agricultural Fund, enhancing visibility and credibility. However, educational content explaining the meaning of certifications or the advantages of sustainable production remains limited. In most cases, sustainability messaging is superficial, providing minimal information to guide consumer understanding.

Examples:



Among various sustainability-related factors, the use of recyclable or recycled packaging stands out as one that requires relatively little explanation and is widely recognised by consumers as a tangible expression of environmental responsibility. Unlike more complex aspects of sustainability, packaging made from recyclable or recycled materials is immediately associated with ecological awareness and waste reduction, making it an effective and frequently used element of sustainability communication. Complementing this approach, the companies also conduct promotional campaigns that emphasise special programs and additional benefits for farmers supplying organic raw materials.

Examples



Sustainability-related advertising often strives to emphasize the product's high quality. Plant-based products are no exception; advertising messages often contrast them with animal-based alternatives, highlighting their environmental benefits and positioning them as a responsible choice for the planet, but also highlighting their quality through statements such as "0% meat, 100% flavor." In addition to plant-based messages, communication also highlights additional benefits, such as nutritional value, the presence of vitamins, the absence of sugar and gluten, and the use of whole grains instead of concentrates.

Examples



The lack of clear explanation and consumer education in the field of sustainability leads brands to simplify their communication, often using a binary approach in which food products are presented as having either 0% or 100% of certain promoted attributes or ingredients, leaving no room for nuance or intermediate values. Brands also tend to focus on signalling quality or ethical production without fully supporting consumers in understanding why these choices matter or how they contribute to environmental and social outcomes. Only occasionally does information appear explaining how products are made. Indication of what actions the brand takes to, for example, save water, energy, or turn off heat.

4. Sustainability communication trends

4.1 Overview

Between **2022** and **2024**, sustainability has become a consistent narrative in European food advertising. The dominant themes include transparency, local sourcing, eco-friendly packaging, and responsible production.

4.2 Poland

Brands increasingly emphasise local sourcing and waste reduction. While international brands lead this movement, local companies are expanding their sustainability storytelling through both traditional and digital channels.

4.3 Lithuania and Estonia

Estonian brands show the most advanced sustainability messaging, integrating digital campaigns and clear visual certifications. Lithuania demonstrates growing adoption, particularly in 2024, following regulatory changes.

4.4 Romania

Sustainability messaging is emerging and mostly focuses on product quality and natural ingredients rather than explicit ecological benefits. Educational campaigns remain limited.

5. Target group: persons interested in sustainability

5.1 Who are the persons interested in sustainability?

A precise understanding of the target audience is essential for effective media planning, as it determines which channels, formats and messages will actually reach and influence the intended consumers. Different audiences vary widely in how they consume media, what information they trust, and how they respond to sustainability claims; without this knowledge, even well-funded campaigns risk inefficiency or misunderstanding. Clear audience insight ensures that communication aligns with real motivations and behaviours, increasing both the credibility and impact of sustainability messaging.

For the purpose of this report, we checked and analysed who are the recipients of Sustainability Ads. Based on GWI (GlobalWebIndex a leading international research provider offering comprehensive, continuously updated data on online consumer behaviours across more than 50 global markets), persons interested in sustainability represent the most aware, engaged, and information-seeking consumer group within environmental topics. Although they make up a relatively small share of the population (typically 10–20%, depending on the market), their influence on trends, public debate, and brand perception is significantly larger than their size.

These are consumers who:

- actively follow environmental topics,
- can distinguish real action from greenwashing,
- monitor regulatory and industry developments,
- participate in social conversations and shape opinions,
- expect full transparency and consistency from brands.

Within the food sector, sustainability-interested consumers often act as “opinion shapers. „They are the first to adopt new environmentally friendly solutions (deposit return, refill systems, compostable packaging), and their behaviours frequently diffuse into the mainstream over time.

5.2 Attitudes and motivations of sustainability-interested consumers

Strong need for authenticity

Environmentally engaged audiences are highly sensitive to:

- exaggerated environmental claims,
- vague wording,
- lack of supporting evidence.

They expect specifics, clarity, and verifiable actions.

Desire for deeper knowledge

These consumers:

- read long informative articles, reports and analyses,
- seek information about CO₂ footprint methodologies,
- compare certifications and sourcing practices,
- follow EU policy developments.

Higher expectations toward brands

They look for:

- clear, measurable commitments,
- progress reporting,
- scientific or Non-Governmental Organisation (NGO) partnerships.

Conscious, less impulsive buying behaviour

They are not as price-sensitive as the mainstream, provided the brand delivers genuine sustainability value. They buy less often but better, and remain more loyal to transparent brands.

5.3 Media consumption of persons interested in sustainability

5.3.1 Digital-first, with a preference for educational content

These audiences:

- actively search for information online,
- consume long-form content on YouTube, Video on Demand (VOD) platforms, podcasts and educational channels,
- value context and explanation over slogans.

5.3.2 Above average radio consumption

These audiences:

- regularly listen to radio during routine moments, such as commuting, household tasks or work, when attention is steady and messages are easily absorbed.

5.3.3 Highly active in social media

Especially on:

- Instagram,
- YouTube,
- LinkedIn,

- Twitter/X,
- TikTok (educational and commentary segments).

They often comment, share and initiate discussions.

5.3.4 OOH is noticed - when it is concrete and actionable

Outdoor communication is effective when it provides:

- clear instructions,
- behavioural cues,
- specific sustainability claims.

5.3.5 Above-average consumption of premium and expert media

They read:

- specialist media,
- think-tank reports,
- environmental analyses,
- publications from NGOs.

5.4 Expectations toward brands

5.4.1 Transparency - no exceptions

Sustainability-interested consumers want full visibility of:

- the origin of materials,
- the actual CO₂ footprint,
- the recyclability of packaging,
- the percentage of renewable materials,
- independently verified targets.

5.4.2 Consistency and long-term commitment

One-off campaigns do not build trust. They expect long-term sustainability strategies and evidence of progress.

5.4.3 Education instead of empty claims

They respond best to content that:

- explains processes,
- clarifies complexities,
- shows data and scientific rationale,
- contextualises the claim.

5.4.4 Collaboration with experts and trusted institutions

Partnerships with the following actors significantly increase credibility:

- NGOs,
- scientists,
- circular economy organisations,
- certification bodies.

5.5 Why do Persons interested in sustainability matter?

- **They shape narratives and influence societal expectations**

Their opinions often cascade to media, creators and policymakers.

- **They accelerate mainstream adoption**

When sustainability-interested consumers adopt new behaviours, the mainstream follows.

- **They significantly influence brand reputation**

Their feedback - positive or negative - spreads rapidly online.

- **They build long-term loyalty**

When a brand proves credible, this group becomes one of its strongest advocates.

5.6 Summary

The persons interested in sustainability represent a critical strategic audience for any brand communicating environmental responsibility. They are motivated, informed, demanding and highly influential. To reach them effectively, brands must:

- communicate precisely,
- provide evidence,
- educate consistently,
- maintain multi-channel alignment,
- sustain high frequency,
- remain transparent at all times.

Winning their trust is difficult, but when achieved, it becomes one of the most powerful forms of brand equity and social influence.

6. Conclusions and recommendations

- Sustainability advertising represents a **small but growing segment** of media investment across all analysed markets.
- Brands should **prioritise sustainable practices internally before promoting them externally**, ensuring that communication reflects authentic commitment rather than marketing positioning alone.
- It is essential to consider whether consumers **truly value corporate environmental efforts**, and to align campaigns with areas where sustainability resonates most with the target audience.
- **Educational messaging** should be integrated to help consumers understand the meaning of sustainability certifications and the tangible benefits of choosing sustainable products.
- Change should be approached **incrementally**, building sustainability into core business practices step by step, while gradually expanding communication as credibility and infrastructure grow.
- Effective sustainability campaigns require the **same level of strategic planning and platform readiness as any other major advertising initiative**, ensuring proper media mix, creative execution, and measurable outcomes.
- Brands should combine **credible certifications, product quality, and informative messaging** to maximise consumer engagement and long-term impact.
- Media strategies should integrate **TV, OOH, Radio and digital channels**, leveraging each platform for both reach and educational storytelling.