
Intensity of Commercial Communication in Poland in the Field of Dietary Supplements

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Katarzyna Hys¹, Dominika Barbara Matuszek², Krzysztof Olejnik³,
Karol Bierczyński⁴

Abstract:

Purpose: The purpose of the paper is to analyse and evaluate the frequency of commercial communications on health products and medicine with special consideration of dietary supplements.

Design/Methodology/Approach: The paper features a quantitative data analysis concerning the number of commercial communication aired in a single week in four Polish TV stations: TVP1, TVP 2, POLSAT, TVN on supplementary, health products and medicine, with special consideration of dietary supplements.

Findings: The analysis allowed for the presentation of the frequency of commercial communications on the studied products. It was demonstrated that the intensity of commercial communications on dietary supplements is high, thereby translating into dynamic growth of the industry and its sales. Furthermore, it was demonstrated that there are many different dietary supplements and that their availability in the market is unlimited.

Practical implications: Commercial communications on dietary supplements in the vitamins and fortifying preparations category suggests that a substantial portion of consumers should supplement the deficiencies of ingredients from this group.

Originality/value: The aim of raising the issue is to provoke a discussion on the potential opportunities and threats concerning the intense promotion of dietary supplements and other supplementary products around the world.

Keywords: Dietary supplements, commercial communications, Poland.

JEL code: M3.

Type of study: Research article.

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¹Assoc. Prof., Department of Management and Production Engineering, Faculty of Production Engineering and Logistics, Opole University of Technology, 45-758 Opole, Poland, ORCID 0000-0003-0800-2804, e-mail: k.hys@po.edu.pl;

²Assoc. Prof., Department of Biosystems Engineering and Chemical Processes, Faculty of Production Engineering and Logistics, Opole University of Technology, 45-758 Opole, Poland, ORCID 0000-0002-5200-1561.

³Assoc. Prof., Department of Logistics, Faculty of Production Engineering and Logistics, Opole University of Technology, 45-758 Opole, Poland, ORCID 0000-0003-4391-0437.

⁴Department of Biosystems Engineering and Chemical Processes, Faculty of Production Engineering and Logistics, Opole University of Technology, 45-758 Opole, Poland, ORCID 0000-0002-0184-5115.

1. Introduction

The conducted subject literature review demonstrated that Polish consumers do not distinguish (Raport, 2016) between products such as *health products* and *medicine*, especially in terms of *dietary supplements*, *prescription medicine* and *OTC medicine* - over-the-counter drug (Hys, 2017). It can therefore be assumed that the lack of basic consumer knowledge on this issue is a threat for their health and life or as stated in the inspection summary of the Supreme Audit Office's (NIK) report "is a high health-risk area" (Info, 2016; Hys and Koziarska, 2021; Hys, 2020; Ronis *et al.*, 2018; Schwingshackl *et al.*, 2017; Wierzejska *et al.*, 2022).

Consumers can acquire basic knowledge from the definitions that include basic information on the nature of particular formulae. The following product groups constituted the focus of the paper: medicinal products, dietary supplements, medical products, fortified foods, special-purpose foods, hygiene and care products (Koo *et al.*, 2020; Sirico *et al.*, 2018; Hys and Koziarska, 2020).

In the Polish law, issues concerning medicine and supplements are regulated, with reference to the EU directives (Directive 2001/83/EC; Directive 2002/46/EC; Regulation (EC) No 1924/2006; Regulation (EU) No 1169/2011; Regulation (EU) No 432/2012), mainly by the Act of 6 September 2001 (Pharmaceutical Law) and Act of 25 August 2006 on food and nutritional safety.

According to the Pharmaceutical Law Act, a **medicine** is a substance or mixture described as possessing properties that prevent or cure human or animal diseases, or administered to make a diagnosis or to restore, improve or modify physiological functions through pharmacological, immunologic or metabolic action (Act of 6 September 2001).

On the other hand, **dietary supplements** are foodstuffs, the purpose of which is to supplement normal diet, constituting a concentrated source of vitamins or mineral components, or other substances that demonstrate a nutritional or other physiological effect, simple or complex, introduced into the market in a form that enables dosage, in the form of: capsules, tablettes, pills and other similar forms, powder bags, liquid ampules, droppers and other similar forms of liquids and powders intended for consumption in small, measured unit quantities, excluding products with medicinal properties within the meaning of the Pharmaceutical Law (Act of 25 August 2006).

A **medical product** is a tool, instrument, device, software, material or other object used independently or in combination, including with the software intended by its manufacturer for special use in diagnostics or treatment and required for its intended use, intended by the manufacturer for human use for the following purposes:

- *diagnostics, prevention, monitoring, treatment or alleviation of disease,*
- *diagnostics, monitoring, treatment, alleviation of or compensation for an injury or disability,*
- *testing, substitution or modification of anatomical structure or physiological process,*
- *conception control,*

the primary intended action of which in or on the human body is not achieved as result of using pharmacological, immunological or metabolic means, but the action of which can be supported by such means (Act of 20 May 2010).

According to the Act on food and nutritional safety, **fortified food** is a foodstuff that *can be complemented with vitamins, mineral components or other substances that demonstrate a nutritional or other physiological effect (Regulation (EC) No 1925/2006).*

Special-purpose food is defined as a *foodstuff which due to its special ingredients or preparation method differs substantially from widely consumed foodstuffs and, according to the information specified on the packaging, is introduced into the market to satisfy the special nutritional needs of (Act of 25 August 2006):*

- *people with unsettled digestive processes and metabolism or people who due to their special physiological condition can gain special benefits from the controlled consumption of the substances contained in the food – this food can be referred to as “dietary”,*
- *healthy infants and small children at the age of one to three.*

The **hygiene and care products** are other substances intended for hygiene and care, but are not medicinal products, supplements, medical products or foodstuffs. As a result, each of the defined substances/agents has a different intended use, indications, effect or dosage/use (Hys, 2017; 2018). It is therefore a mistake for consumers to use medicinal products and medicine interchangeably as they are not interchangeable.

Due to the fact that a rapid growth of the dietary supplements market can be observed in recent years (Table 1), this paper will be focused on the number of commercial communications about these product groups.

The *Grand View Research* report states that “*The global dietary supplements market size was valued at USD 140.3 billion in 2020 and is expected to expand at a Compound Annual Growth Rate (CAGR) of 8.6% between 2021 and 2028*” (Grand View Research, 2022). The *Fortune Business Insights* report reads that “*The global dietary supplements market size is projected to reach, exhibiting a CAGR of 9.8% during the forecast period 2020-2027*” (Fortune Business Insights, 2022). On the other hand, the Mordor Intelligence elaboration states that “*The dietary supplements*

market is projected to register a CAGR (Compound Annual Growth Rate) of 6.91% during the forecast period 2021- 2026” (Mordor Intelligence, 2022).

Table 1. Value of the dietary supplements market in Poland (PLN billion)

Year	Market value (billion)	Yearly growth
2020 p	5,04	0,35
2019 p	4,69	0,34
2018 p	4,35	0,33
2017 p	4,02	0,29
2016 p	3,73	0,23
2015	3,50	0,17
2014	3,33	0,08
2013	3,25	0,26
2012	2,99	0,06
2011	2,93	0,84
2010	2,09	0,08
2009	2,01	0,29
2008	1,72	0,33
2007	1,39	0,35
2006	1,04	0,26
2005	0,78	bd

Note: p - forecast; bd - no data.

Source: Own elaboration based on: Report, 2011; Report 2011-2013; Report 2015; Report 2015-2020.

Despite the fact that there are various supplementary products market development rate scenarios around the world, it must be stated that the forecasts mentioned are optimistic (the forecast differences can derive from many factors, including the adopted study methodology, scope of research or the forecast period).

2. Materials and Methods

The purpose of the paper is to identify the frequency of commercial communication broadcasts on health products and medicine with special consideration of dietary supplements in the studied TV stations.

The paper’s detailed objectives for the conducted studies were defined as follows:

- analysis of the share of particular sectors’ commercial communications in public TV stations with special consideration of the sector of health products and medicine,
- analysis of the share of particular product categories in commercial communications for the sector of health products and medicine,
- analysis of the share of commercial communications on dietary supplements in particular TV stations,

- analysis of the share of particular product categories in commercial communications with reference to dietary supplements.

Following the specified objectives, in-depth studies using the desk research technique as well as an interview with a National Broadcasting Council (KRRiT) expert were conducted. They featured the use of primary quantitative data and secondary data published in the analytical reports of NIK, KRRiT, PMR Research and in public online databases and sectoral publications. The primary quantitative data was collected from the report commissioned by KRRiT on commercial communications in selected public TV stations (Prędką, 2015; Wierzejska *et al.*, 2022).

The analysis of primary data and numerous secondary sources was conducted as part of the following research stages:

- review of domestic literature on the issue of commercial communications, especially with reference to health products and medicine,
- identification and definition of the basic product categories as part of the *health products and medicine* sector,
- identification and analysis of the primary data on the quantity, share and income on commercial communications within the defined objectives for health products and medicine with special consideration of *dietary supplements*.

The quantitative data used concerns studies conducted in a single week for communications aired in four Polish TV stations: TVP1, TVP 2, POLSAT, TVN. The following commercial communications were aired in the aforementioned stations in the studied period (Prędką, 2015):

- 49 preparations from the medicinal products category,
- 32 preparations from the dietary supplements category,
- 11 preparations from the medical products category,
- 1 commercial communication for fortified foods,
- 7 preparations from the special-purpose foods category,
- 4 preparations from the hygiene and care products category.

3. Results

During the first stage, the data on the share of commercial communications on particular sectors in public TV stations were sorted by the number of commercial communications aired in Poland in relation to 2015 (Table 2). Due to the paper's objective, the analysis mainly covered the *health products and medicine* sector.

All commercial communications aired in the studied period were classified in the 20 defined sector (Table 2). Most aired commercial communications concerned the *food* sector. However, starting from 2014, the *health products and medicine* sector

substantially outpaced the *food* sector and outclasses other sectors in the entire ranking. The share of the *health products and medicine* sector in commercial communications is constantly increasing, which is also confirmed by KRRiT's expert with whom an interview was conducted.

In 2014, the Polish TV stations TVP1, TVP2, Polsat and TVN earned over PLN 1.4 billion for airing commercial communications on the *health products and medicine* sector (Prędką, 2015). It can be concluded that the market of commercial communications on this sector is growing dynamically as it is bringing effects desired by the advertisers.

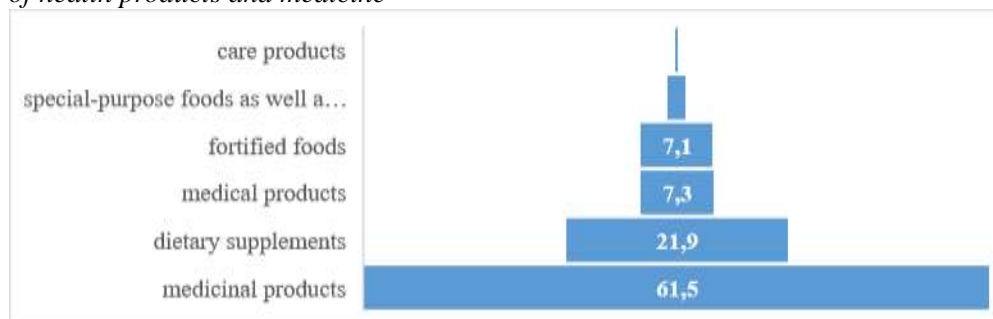
Table 2. Number of commercial communications aired in public stations

Year Sector	2010	2011	2012	2013	2014	2015*	Total
health products and medicine	99 656	126 664	133 988	168 754	196 072	167 747	892 881
food	180 484	178 962	157 779	174 756	159 253	122 540	973 774
sale	33 912	43 231	55 547	81 422	89 729	66 302	370 143
finances	41 369	59 242	68 139	82 929	79 878	64 532	396 089
personal care	104 885	103 687	96 022	97 367	82 010	57 862	541 833
telecommunication	104 328	106 032	91 452	88 524	74 691	55 798	520 825
entertainment, culture	36 814	42 255	48 878	46 418	44 822	35 158	254 345
household cleaning	48 850	48 019	44 496	39 394	27 635	20 964	229 358
automotive, transport	17 988	22 651	20 973	23 889	22 737	19 433	127 671
marketing	8 945	10 505	11 553	17 893	18 319	15 131	82 346
services	8 927	11 593	13 499	15 094	13 981	13 128	76 222
construction	6 017	5 305	5 406	13 304	12 236	11 047	53 315
home and office	11 418	11 399	16 912	15 594	15 403	10 188	80 914
products for children	15 270	16 000	13 562	15 373	8 368	6 747	75 320
agriculture, gardening	2 002	2 356	2 783	4 870	4 060	4 087	20 158
animal products	5 637	6 370	5 160	5 992	5 088	3 724	31 971
clothing, footwear	1 580	3 015	3 692	4 951	5 688	2 868	21 794
election campaigns	678	1 632	71	14	1 016	766	4 177
other	27	36	1 593	245	750	105	2 756
industry	bd	bd	bd	2 297	529	64	2 890
Total	728 787	798 954	791 505	899 080	862 265	678 191	4 758

*the data of 2015 concerns three quarters; bd - no data

Source: Own elaboration based on (Prędką, 2015).

Then, the analysis covered data on the share of particular product categories in commercial communications for the *health products and medicine* sector (Figure 1).

Figure 1. Share of particular product categories in the commercial communications of health products and medicine

Source: Own elaboration based on (Prędka, 2015, p. 26).

Five product categories were defined for this sector: medicinal products, dietary supplements, medical products, fortified foods, special-purpose foods as well as hygiene and care products. It must be noted that all data presented in Figures 1-2 and in Table 3 concern a single week, during which the measurements were taken.

Among the identified product categories, medicinal products are an undisputed leader in terms of the share of commercial communications in the total number of the sector's communications (61.5%). The share of communications for dietary supplements amounts to approx. 22%. For other products in the given sector, the share of communications amounts to 16.7%.

Among the studied TV stations, the most commercial communications on dietary supplements were aired by TVP2 (35.6%) and slightly less by TVP1 (33.6%). On the other hand, the highest income from communications broadcasting was achieved by TVP1 (35.5%) and Polsat (27.6%) which aired half of the commercial communications when compared to TVP2.

Table 3. Number of and income from commercial communications on dietary supplements in particular stations

TV stations	Number of commercial communications	Share (%)	Broadcasting income	Share (%)
TVP2	429	35,6	1 587 765	23,2
TVP1	404	33,6	2 432 995	35,5
Polsat	206	17,1	1 890 445	27,6
TVN	165	13,7	938 390	13,7
Total	1 204	100,0	6 849 595	100,0

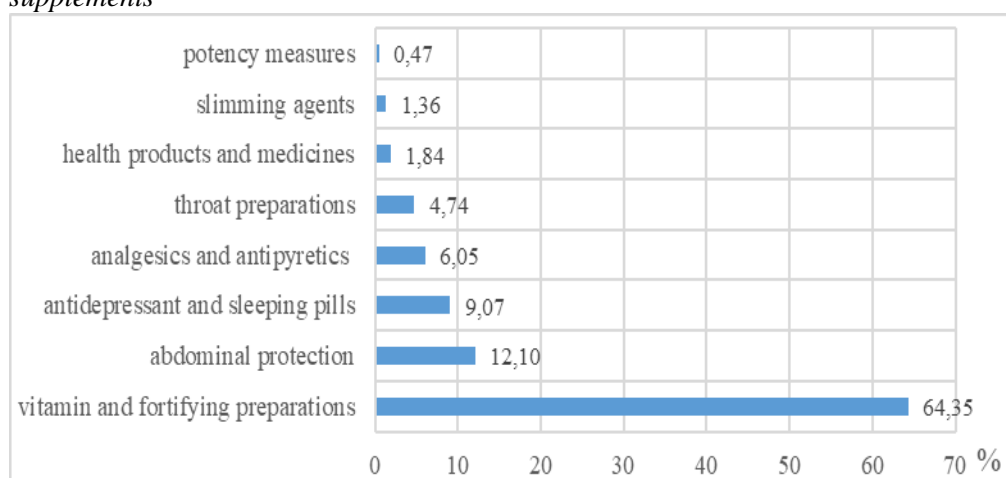
Source: Own elaboration based on (Prędka, 2015, p. 34).

It is also appropriate to consider the product structure in the *dietary supplements* category (Figure 2). The aired commercial communications included advertisements of a total of 32 preparations that were classified in seven product groups. These included: vitamins, fortifying foods, abdominal protection agents, sedatives,

antidepressants, sleeping pills, analgesics and antipyretics, sore throat preparations, health products and medicine (group advertising), slimming products and potency drugs.

Commercial communications on dietary supplements in the vitamin and fortifying preparations categories constitute nearly 65% of all broadcasts in this area. Dietary supplements are also advertised as a remedy for ailments related to abdominal protection (12.1%), in the sedatives, antidepressant and sleeping pills categories (9.07%), analgesics and antipyretics (6.05%) as well as sore throat preparations (4.74%). Commercial communications on other dietary supplement categories constitute 3.67% of air time.

Figure 2. Share of particular categories in commercial communications on dietary supplements



Source: Own elaboration based on (Prędką, 2015, p. 35).

Such a high share of commercial communications on dietary supplements in the *vitamins and fortifying preparations* category suggests that a substantial portion of consumers should supplement the deficiencies of ingredients from this group. However, many questions arise. Are the commercial communications in this product category aired in accordance with the legal requirements? Do they include appropriate and correct information? Do they include excessively suggestive signals that create a distorted image of a balanced diet in the consumers' minds?

Numerous institutions of the pharmaceutical market in Poland object against misuse and irregularities in the marketing of medicinal products and medicine, especially dietary supplements (Hys, 2017; Petroczi *et al.*, 2011). They perceive a threat for the consumers' lives and their quality, and take up action aimed at changing this situation. Nevertheless, the results of the studies conducted by the author of this paper indicate that this action is unsatisfactory and does not affect consumer attitudes. It is ineffective.

Due to the above, the raised issue is a huge scientific challenge on one hand, while constituting an important problem in terms of management, especially in social responsibility, quality of life and fair marketing, on the other.

4. Conclusion

NIK's report features a concern about the rapid growth of the Polish dietary supplements market in recent years, which in 2020 was valued at USD 140.3 billion. At the same time, the dietary supplements market became referred to as a high health risk area.

Due to the above, this paper features an analysis of primary data on commercial communications in four public TV stations. The analysis confirmed that there is a rapid rise in the number of commercial communications on dietary supplements, especially for remedies such as vitamins and fortifying preparations; abdominal protection preparations; sedatives, antidepressants and sleeping pills; analgesics and antipyretics as well as sore throat preparations.

As pointed out by other studies, the real problem is that Polish consumers do not differentiate between health products and dietary supplements. They declare that their effects are the same. Meanwhile, among six product groups classified as *health products* and *medicine*, i.e., medicinal products, dietary supplements, medical products, fortified foods, special-purpose foods as well as hygiene and care products, it is only medicinal products that have the properties to *prevent or treat ailments through pharmacological, immunologic or metabolic action*. Others are preparations that are foodstuffs or medical products and serve other purposes.

Nevertheless, the intensity of commercial communications creates and consolidates an incorrect image of the sector in the consumers' minds. By using marketing tricks, the line between medicinal products and supplements is blurred in the consumers' minds, thereby causing a real social problem that corresponds with the consumers' quality of life, marketing and mainly with the entrepreneurs' social responsibility for the impact that they have on society through such intensity of commercial communications.

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