



An Intelligent Assessment of the News

The Natural Products Foundation keeps a constant eye on how the media portrays our industry. Day by day and story by story, we are working to improve the media's perception and presentation of all natural products. This report details some of the key findings and trends from what we've seen over the last several years.

Partnering with the news firm MediaSense, we have analyzed vitamin and dietary supplement related stories from 2006 through April of this year. The stories included in our current report come from U.S. newspapers, magazines, and online news sites. Televised broadcast stories have been included as well if transcripts were made available online or in print.

The news articles have been analyzed for the key messages relevant to each story, the number of opportunities for the public to view the article, and the nature of the story's reportage — the positive or negative spin which can creep into media sources.

Perception is reality. Only by understanding how the products in our field are being perceived are we able to react appropriately and shape our own future.

Media Monitor Report

May 2008–April 2009



Working to Grow a Healthy Industry
www.NaturalProductsFoundation.org



Findings

Specific positive and negative themes have been identified to provide insight into the media coverage of May 2008 - April 2009.

Positive Themes

Recurring positive themes include:

The nationwide move toward renewable, natural sources for sustenance in all aspects of modern life has led to increased interest in nutritional issues, **focusing on balanced dietary practices**. Stories continue to note that taking select supplements under the advice of a physician is **an important part of maintaining a healthy lifestyle**.

Scientific research continues to suggest the **considerable potential benefits of dietary supplements, vitamins, minerals, and**

herbal supplements. Throughout the last year, vitamin D has created the largest stir in the press. There has been a tremendous influx of research noting the potential **benefits of vitamin D**. With encouraging new studies turning up in medical journals each month, vitamin D has commanded a great deal of attention all year long.

Many news articles have noted the increased role supplements are now playing in people's lives **as a safe, inexpensive preventive measure** that may guard against ever rising health care costs.

Supplements continue to be seen as a more natural alternative to many pharmaceutical drugs, consistently registering fewer and less severe side effects, and considerably fewer adverse events.

Negative Themes

Recurring negative themes include:

Concern over the **safety and quality control** exercised by supplement manufacturers has continued to be one of the most noted negative issues aired throughout the press. Purity issues continue to plague the industry, with major product recalls occurring for several well-known brands after contaminants such as chromium and lead were discovered in popular supplements. The frequency and prominence of such stories can also be tied to the ongoing media firestorm over numerous performance enhancement scandals in sports over the past year.

Another major negative theme centered around the perceived **efficacy** of a variety of vitamins. Multivitamins, vitamin C, and vitamin E were among the most popular vitamins being broadly challenged in the press. Various studies put forward damaging assertions that vitamins may either have no benefits at all, or that select vitamins and dietary supplements may actually be harmful to general well-being.

Sadly, a great majority of all stories involving both **dietary supplements and the FDA** are still negative, often highlighting the contentious relationship the agency maintains with its enforcement duties regarding the Dietary Supplement Health and Education Act (DSHEA).

Recommendations

The Natural Products Foundation believes it is important for the industry to understand the effects of the current media climate and what we can do to improve it.

The public's exposure to information about supplements has continued to grow over the past year at a healthy rate, while important key messages regarding quality of life benefits and health care savings have gained traction in a majority of supplement related stories. To capitalize on these positive changes, continued research and new education-based promotional efforts are needed to solidify public opinion regarding the benefits of dietary supplements for long term well-being, both physical and financial. As the country is at the threshold of potentially overhauling the national health care system, action must be taken to clarify the vital role supplements play in our nation's health.

Although the general presentation of news articles has grown more evenhanded, a number of strong negative perceptions about supplements still persist. While the press concerning efficacy, quality control, and safety has declined over the past year, addressing the challenges posed in these three areas should be a primary concern for the entire industry. By using quality ingredients, transparent manufacturing practices, and complying with the guidelines



laid down by DSHEA, the industry can continue to overcome (and convert) any negative reactions from the media at large. A key to this effort will be to further publicize the benefits gained from FDA's widely instituted good manufacturing practices. By continuing to work within the solid framework already established, the industry should create increasingly positive attention, rebutting claims that there are limited controls in place to ensure the safety and quality of supplements.

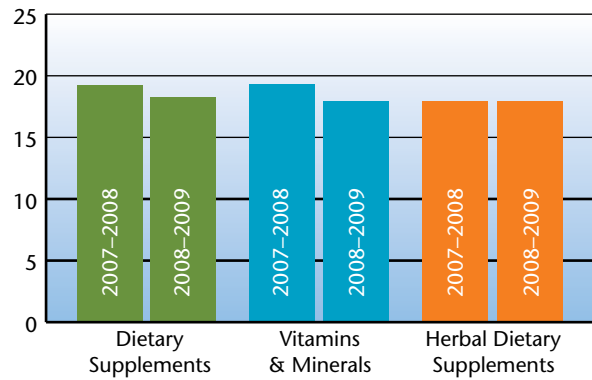
Average Quality Index Score

The quality index measure is scored out of 50 and takes into account factors such as mentions in headlines, prominence in articles, tonality, key message delivery, inclusion of a spokesperson, and third party quotes.

- 25+ entirely positive and exclusive content with consistent and high message delivery
- 20-25 predominately positive coverage and dominance within the coverage
- 15-20 generally positive coverage with some message delivery
- 10-15 some negative content and only partial message delivery
- 0-10 mainly negative content with little message delivery

Analysis Over the past year quality index scores have suffered a slight decline for vitamins, minerals, and dietary supplements. Despite this development, scores are still registering on the upper part of the scale, on the cusp of or just above 18 points, indicating that the quality of media coverage has been relatively consistent and positive throughout this period. In contrast with 12 months previous (May 2007 - April 2008), quality index scores for vitamins, minerals, and dietary supplements have fallen roughly one point in the past year, while herbal supplement scores have remained relatively consistent over the past 24 months.

Quality Index May 2008–April 2009



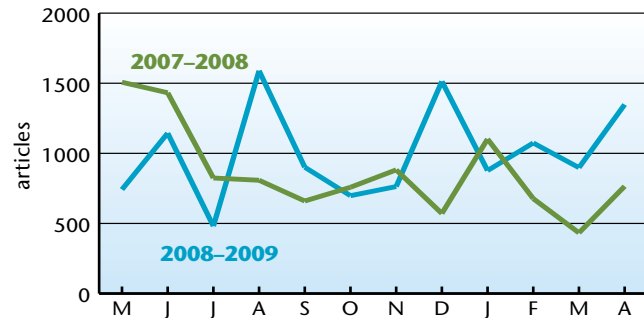
Fueled by new research demonstrating the manifold benefits of vitamin D, stories originating during the fall made a notable positive impact in news cycles which continued through the winter. Overall, quality index scores had remained uniformly strong until the beginning of spring when increased scrutiny was placed on FDA-related recall actions and a run of performance enhancement cases involving high-profile professional athletes. Despite these recent setbacks, results indicate that over the course of the year the messages received by consumers were generally of a favorable nature.

Total Volume

More than 12,000 unique articles on dietary supplements, vitamins, minerals, and herbal supplements were published over the last 12 months. Compared with the year before, this represents a 15% increase. The total readership for these articles also increased substantially. Over the past year the public has had nearly 4 billion opportunities to view these 12,000+ articles, an increase in visibility of more than 500 million.

Total Volume of Articles Analyzed	Opportunities to View
5/07 - 4/08 10,419	5/07 - 4/08 3,429,670,000
5/08 - 4/09 12,027	5/08 - 4/09 3,949,950,000

Total Volume by Month



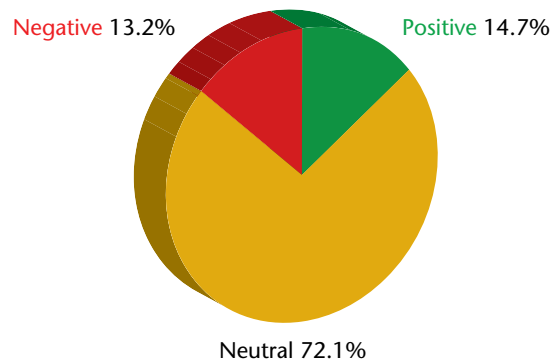
Tonality

To measure tonality, a sophisticated algorithm assesses the references and modifiers used around the dietary supplements mentioned in each news story. The algorithm is then able to score the article as positive, negative or neutral.

Analysis Between May 2008 and April 2009, the tonality of news articles has become decidedly more impartial, with a vast majority adopting a neutral, unbiased presentation of dietary supplements, vitamins, minerals, and herbs.

More than 70% of all news items appearing in the last year maintained a neutral perspective. Measurements for the same period of time one year previous found that only 45% of articles held a neutral position. As a result of this shift away from more biased reporting, the number of articles which portrayed supplements either negatively or positively diminished. Positive and negative articles now number less than 15% at each extreme, forming a realistic, relatively normative distribution reminiscent of a bell curve. This normalization is key to future industry progress within

Tonality May 2008–April 2009



the press. A neutral, unbiased presentation allows the facts surrounding supplements to come to the forefront of stories, presenting consumers with the opportunity to weigh the evidence for themselves and come to their own conclusions. As such, a general and rather sweeping movement toward neutrality in the press is an acceptable development.

Key Messages

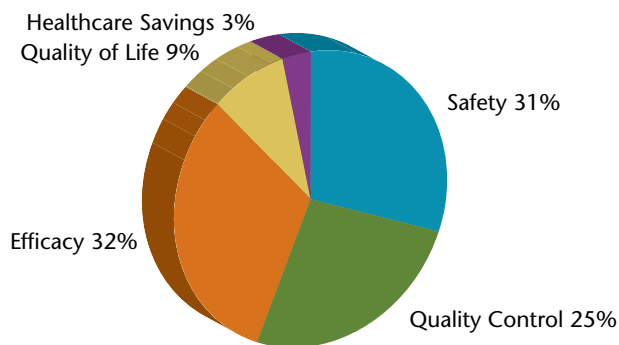
The following is a representation of the key messages or themes most commonly found in media stories related to dietary supplements, vitamins, minerals, and herbal supplements over the past year.

Safety	20.72%
Quality Control	13.53%
Efficacy/Benefits	15.37%
Quality of Life	39.79%
Health Care Savings	10.58%

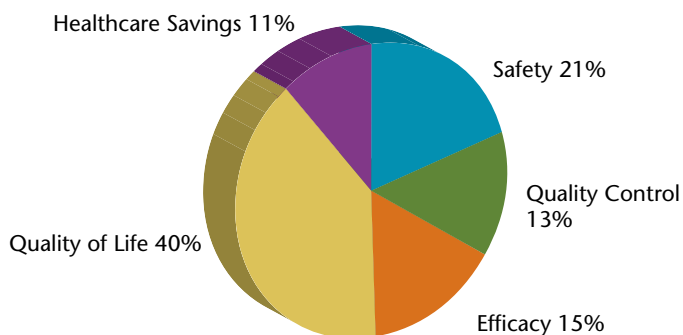
Analysis The past 12 months have seen a substantial realignment among the major themes appearing in supplement media coverage. Stories about efficacy, safety issues, and quality control, the topics which have most often resulted in negative coverage in the past, have decreased substantially. News items related to safety and efficacy have traditionally been the most prevalent messages seen over the last several years, but after a gradual shift away from these topics, the media's focus has been altered.

The biggest change for any key message over the past year was the dramatic increase of stories focusing on quality of life issues. The frequency of quality of life articles has more than quadrupled over the past year. Additionally, news stories discussing health care savings, though modest in terms of overall appearance, have increased considerably, now appearing in one out of every ten supplement related news articles. Themes focusing on quality of life and health care savings are now prominently featured in half of all articles discussing dietary supplements, vitamins, minerals, and herbal supplements. The year previous, these two categories were present in less than 15% of all published articles. Issues relating to quality of life and health care savings have traditionally received very positive coverage, so the rise in prominence of such articles is an encouraging trend.

Key Messages
May 2007–April 2008



Key Messages
May 2008–April 2009



Future Developments

The NPF MediaSense Report is currently expanding the breadth of its investigations into how the media represents our industry. While previous studies have focused primarily on dietary supplements, herbs, vitamins and minerals, starting in March 2009 NPF has begun to track statistics for a variety of other fast-rising natural products categories such as organic foods, natural personal care products, and functional foods.

The Natural Products Foundation (NPF) is organized exclusively to stimulate and support research, education and knowledge regarding dietary supplements, nutritional foods, and related products, with the overall objective of advancing the knowledge of the public, and thereby, improving public health.

The Natural Products Foundation is chartered as a not-for-profit 501 (c) (3) corporation. Depending on the status of the donor (i.e., individual or corporation) all or part of contributions to the foundation are tax-deductible.

NPF initiatives like this report are made possible by donations from the natural products industry. For more information or to pledge your support, please contact Director of Development Deb Knowles at debknowles@NaturalProductsFoundation.org or (941) 349-9044.

www.NaturalProductsFoundation.org



Natural Products Foundation
1773 T St. NW
Washington, DC 20009
(202) 204-4723
(202) 223-0250 - Fax
www.NaturalProductsFoundation.org