



Media Monitor Report Q1–Q2 2008



Working to Grow a Healthy Industry
www.NaturalProductsFoundation.org

Intelligent Assessment of the News—

Provided by the Natural Products Foundation

The Natural Products Foundation keeps a constant eye on how the media portrays our industry. Day by day and news story by news 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 few years.

Partnering with news firm MediaSense, we have analyzed vitamin and supplement related stories from the first six months of 2007 and 2008. The stories included in our 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 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.

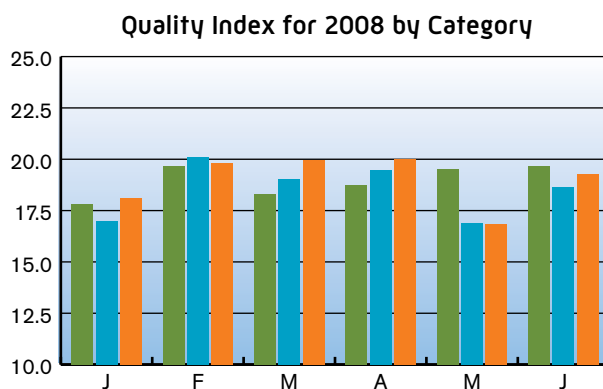
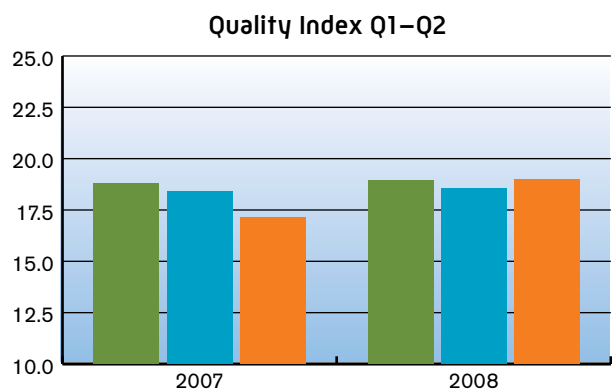
Perception *is* reality. Only by understanding how the products in our field are being perceived are we able to appropriately react and shape our own future.

Average Quality Index Score

Quality index score is scored out of 100 and takes into account factors such as mentions in headlines, prominence in articles, tonality, key message delivery, inclusion of 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 Quality index scores have risen across all categories, consistently registering around 17 and above through the first half of the year, indicating that media coverage has been generally positive. Though there has been a marked decrease in negative stories and a significant rise in Herbal Supplement index scores, our message is still receiving only partial delivery.



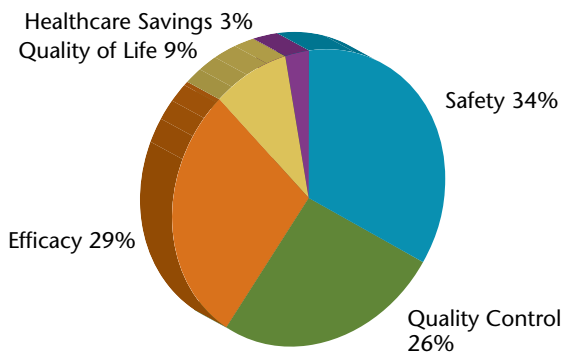
Key Messages

Key messages we track were broken out as follows:

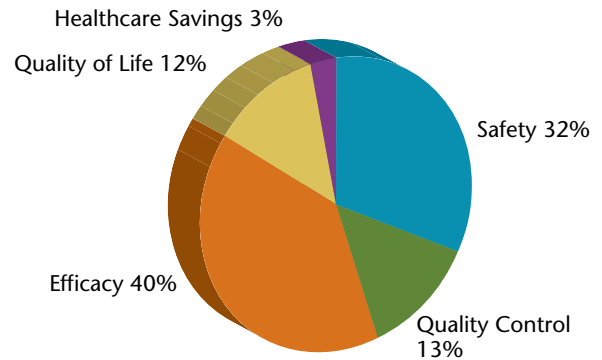
Safety	32.48%
Quality Control	12.72%
Efficacy/Benefits	39.59%
Quality of Life	12.34%
Health Care Savings	2.87%

Analysis The percentage of stories about efficacy has risen, while stories about quality control, which were typically negative, have fallen by approximately 50%. Safety, which had been the most prevalent message for the last several years, continues to make up one-third of the key messages, but has become slightly less important, bypassed by the focus on efficacy and the benefits of taking dietary supplements. The percentages for quality of life messages and health care savings messages changed little from last year.

Key Messages 2007 Q1-Q2



Key Messages 2008 Q1-Q2



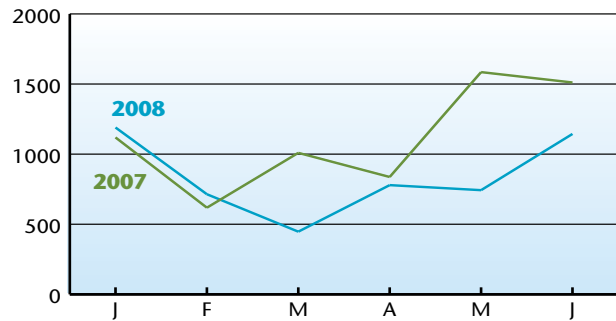
Total Volume

The total number of articles on dietary supplements analyzed in the first half of 2008 exceeded 5,000. Compared with the first half of 2007, this was approximately a 25 percent decrease.

Total Volume of Articles Analyzed:

January - June 2007	6,679
January - June 2008	5,017

Total Volume by Month

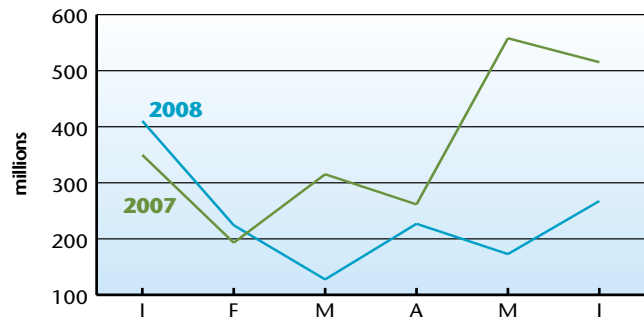


Opportunities To View

Opportunities to View (impressions) measures the extent to which the coverage penetrated the target population, using readership figures for the publications in which coverage appeared.

Our study has monitored more than 1.4 billion opportunities to view news on dietary supplements in the first half of 2008, providing a broad understanding of the messages reaching consumers. January was the strongest and most critical month this year in comparison with the first half of 2007.

Opportunities to View by Month



Findings

Specific positive and negative themes have been identified to provide insight into media coverage in 2008

Negative Themes

Recurring negative themes include:

Concern over the **effectiveness** of dietary supplements came to the forefront as the largest theme seen in the first six months of 2008. Stories suggested that some products either have no effect, or that they are being promoted by unsupportable claims. An increasing number of articles surfaced at the beginning of the year encouraging consumers to seek their vitamins and nutrients in food rather than supplements after several studies were released stating that this was a more efficient practice.

Another reoccurring concern was the **safety** of supplements. Many of the concerns were related to poor **quality control** exercised over ingredients imported from Chinese manufacturers. After the FDA identified and announced that several well-known foreign companies' shipments were contaminated, negative stories in this vein spread throughout the media. Other safety issues focused on the risks of supplements reacting adversely when combined with traditional treatments and medications.

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 upon it.

While the exposure to information about supplements was slightly down in the first half of the year, the overall key messages seen across all media grew more positive in the charted categories. The amount of information available to the public must be increased while still maintaining the positive tone that the last few months have produced.

Two of the strongest persuasive messages concerning dietary supplements, the quality of life benefits and potential health-care savings, continued to receive far less attention than other, less favorable topics. Increased exposure to these topics would ensure a steadily rising positive message.

Negative perceptions of supplements continued to decline in the first half of 2008 but still remain, with the media attention shifting away from quality control to greater concerns regarding efficacy of supplements. Further publicizing the benefits gained from the FDA's enforcement of the manufacturing standards established last year should generate more positive exposure.



Positive Themes

Recurring positive themes include:

Scientific studies suggesting the extensive **potential benefits of dietary supplements** continue to be widely reported in the first half of 2008.

Articles reporting the **increasingly beneficial aspects of Vitamin D** were heavily circulated throughout the media.

It was noted in many stories that **supplements are still seen as considerably more natural than pharmaceutical drugs**, having fewer and far less severe side effects, as well as being substantially less expensive.

Stories mentioned that taking select supplements in collaboration with a physician's advice was an important part of **maintaining a healthy lifestyle**.

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 dietary supplement industry. For more information or to pledge your support, please contact 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