



# Welcome to the GLP-1 Revolution

---

While artificial intelligence (AI) continues to dominate the headlines, GLP-1s, a class of drugs first used to treat diabetes that are now being adopted for weight loss, have quietly risen to prominence. Their impact on health, lifestyle, consumer mindset, and behavior could be seismic and have massive long-term consequences for businesses, institutions, and more. What's in store? Havas, in a 2024 original study, explores.

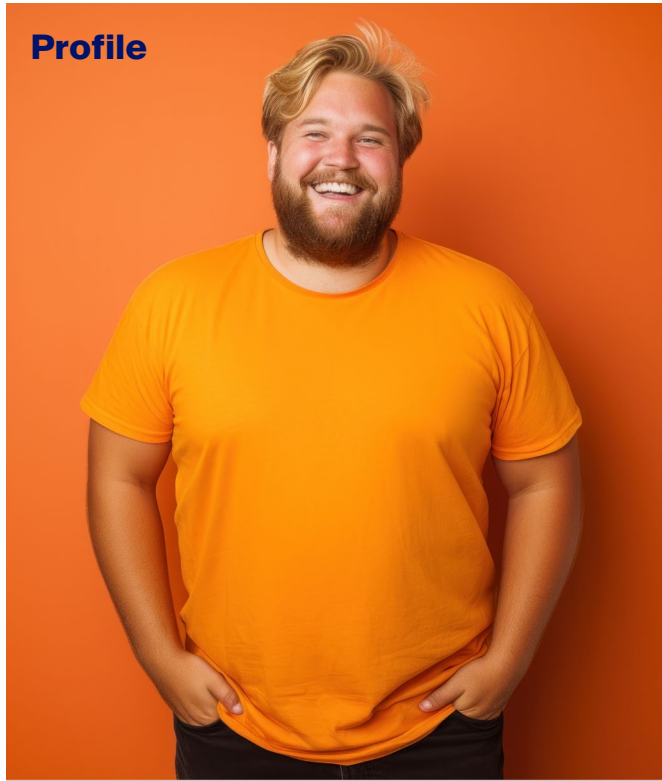






# Understanding the GLP-1 users

Who are these users, then? Here is what our study shows...



## Profile

Male



37  
Average age

White



College or higher



Urban/City



>\$70k  
HH income



Lean Left



## Usage



Average starting weight is 230 lbs and they desire to lose on average 49 lbs



They spent an average of \$550 per month on GLP-1s



They get their GLP-1s primarily from drug stores



83% CVS & Walgreens  
31% Walmart  
23% Amazon  
13% Costco  
13% Target

## Perceptions of GLP-1s

GLP-1 users have a more favorable perception of the drugs, viewing them as safe and effective for weight management, offering additional health and psychological benefits such as increased confidence and improved relationships. They believe these drugs should be more accessible.

% of GLP-1 users vs non-users who agree with the following statements:



Offer people a safe and healthy way to lose weight



Provide people with health benefits beyond weight loss such as preventing other illnesses and diseases



Should not be limited to people who have been diagnosed with obesity or diabetes and be accessible to everyone



Should only be prescribed to people who have been diagnosed with obesity or diabetes

■ Users ■ Non-users





“There’s been such an interesting arc of discourse in the last 10 years,” says Whiteman. “People were very quick to say [GLP-1s were] vanity or that people were depriving others in need of diabetes treatment. Now, there’s more discourse about how weight is not necessarily as simple as diet and exercise. Maybe it’s hypothyroid or harder to control. GLP-1s are just being viewed as modern medical progress. People who’ve lived healthy lifestyles but struggled [with weight] are using these drugs and talking about how genuinely life-changing they are.”

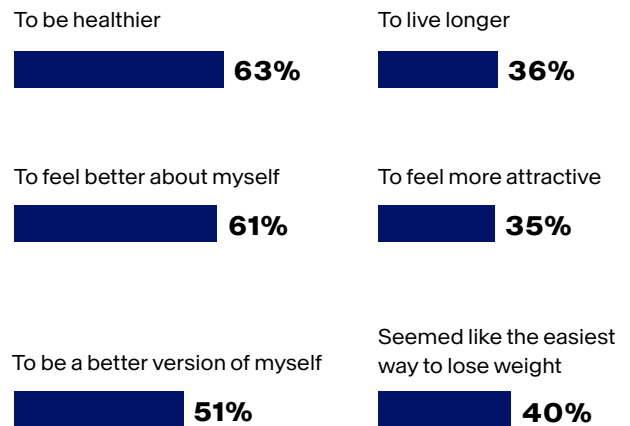
This brings us back to the point of how significant a role culture will play in how brands navigate the changing landscape. The “Progress Culture” has been taking over much of consumers’ purchase behaviors driven from a get-it-done attitude. A need for immediate accomplishments is fueling a desire in consumers to improve their person and their world. This is of profound importance in understanding how GLP-1s are being adopted and the future and the impact they are creating.

While weight reduction is the trigger for people to seek out a physician to start taking a GLP-1, it is not their goal. Their goal is to realize a better version of themselves—to make their world better.

GLP-1s align with the belief in cultural progress, and they are enabling it. The added health benefits of reduction in cardiac risk, osteoarthritis, dementia, etc., are reinforcing the belief that they are making themselves better people.

## Our study shows that Weight loss isn’t the only motivation for users to start a GLP-1

The main reason(s) **GLP-1 users** start treatment:





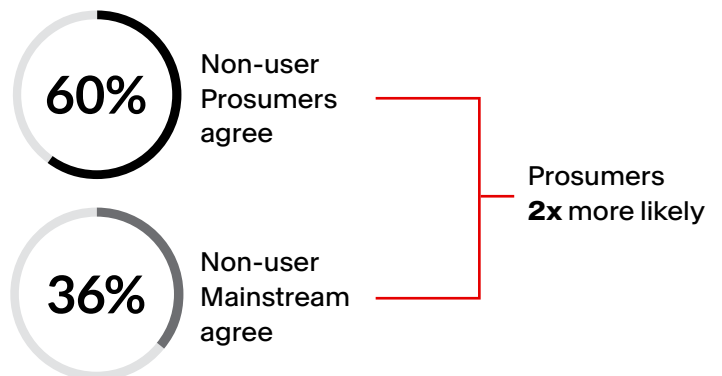
# I Obesity: A new economic divide

There are issues around inclusion for lower-income populations because this group of drugs is set at a premium price point. Will thinness vs obesity represent a new economic divide? Equitable access to GLP-1 drugs, framed in public health terms, could likely become a major purpose for healthcare companies.

Given the substantial market opportunity, we are likely to see the pace of innovation accelerate to reduce costs of manufacturing, administration, etc. We are already seeing creative innovation taking place—the digital healthcare platform Hims & Hers Health, Inc. has hit the headlines for introducing its own US \$200 per month GLP-1, while breaking taboos by specifically marketing it to male audiences. (Diet culture has historically zeroed in on women, but a new “brozempic” —as cult food blog Snaxshot coined it—revolution might be on the rise.) Indeed, our own research finds that more men than women use GLP-1s, with a 64% vs 36% split.

Based on patent loss of exclusivity, we may see an influx of lower cost options hit the market around 2031. Alternatives are also emerging. Sales of berberine, referred to as “nature’s Ozempic,” have reached US \$10.7 million over a recent 52-week period, according to data provider SPINS. Studies show it could support metabolic health and glucose levels.

GLP-1s should be more accessible because they can help fix a widespread and costly problem in our society







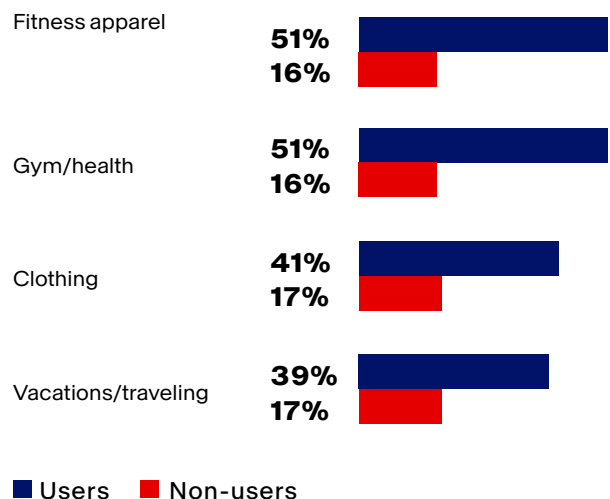
# Weight control: A widening industry

“The implications for brands and marketers extend far beyond the health and wellness categories and into the lifestyle sector at large,” observes Sinnock. “For consumer packaged goods (CPG) brands, beverage companies, and fast-food chains, it questions the narrative around personal responsibility for weight control”. It will also create challenges around how to market smaller—not bigger—portions to newly satiated, food-ambivalent consumers.

For decades, the food system has been engineered for over consumption. Now brands must rethink portions, communication, health promises, satisfaction, and beyond. Every bite will count, especially when it comes to nutrition. Already, Nestlé has launched Vital Pursuit, a range of GLP-1-optimized frozen meals, high in protein and fiber, which are two dietary building blocks that are in short supply when appetites are reduced. Health and weight loss-focused food sellers Daily Harvest and Nutrisystem have also launched GLP-1-friendly food options. Nutrition companies like Nourish and Berry Street, meanwhile, are now promoting dietician services for people taking these drugs, where things like protein intake and malnutrition risks are emphasized. Fitness company Equinox has also launched a “GLP-1 protocol”—a personal training program to help GLP-1 users help preserve muscle mass.

**When people take GLP-1s, the impact on their entire lifestyle, is massive. This represents opportunities for multiple industries:**

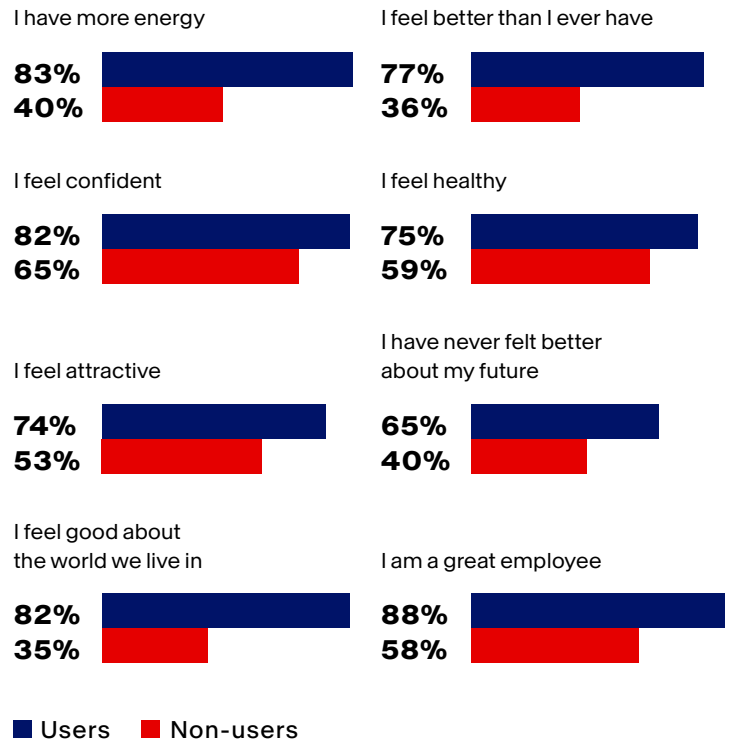
**% of GLP-1 users vs Non-users increasing spend on the following**





According to Sinnock, this group of drugs are transformative because they are more than medications; they are already impacting culture, consumer identities, and consumers' sense of themselves in new ways. "Their impact is not just control over weight—and all the health benefits associated with it," he says. "They're creating a group of consumers whose outlook on life is changed—more confident, more empowered, and also with entirely new lifestyle habits. That's why this is such a big shift. And why it will impact just about every industry."

**% of GLP-1 users vs Non-users who agree to the following statements**





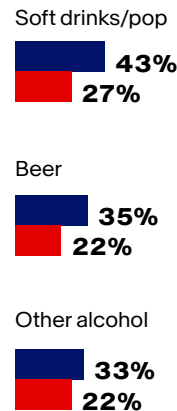
# The Me-economy of health: Building Meaningful Brands™ in the GLP-1 era

The GLP-1 effect is going to redefine the notion of treats and treats or indulgence marketing among this audience. Morgan Stanley analysts estimate snack consumption—specifically for fizzy drinks, baked goods and salty snacks—could fall up to 3% in the United States by 2035. What will be the new “treat” in this scenario? Our recent Meaningful Brands™ study found that, more than ever, consumers are looking for more accessible health options and brands that will adapt products and channels to their needs. A new wave of snacking innovation is surely on the horizon.

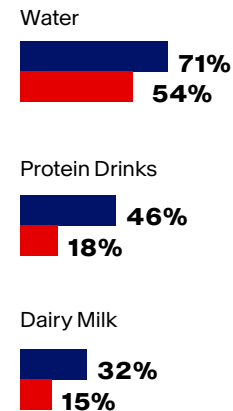
“What’s very interesting in our Prosumer study,” notes Nicole Maunder, Senior Vice President, Strategy at Havas Health, is that “many GLP-1 users are cutting back on alcoholic beverages and sugary drinks like soda and increasing consumption of protein drinks, tea, and milk instead. They are also increasing consumption of vegetables, fruits, and protein-based foods. Approximately 12% to 15% have quit drinking alcoholic beverages too, which could have a large impact on how consumers connect with one another at moments where food and alcohol play center stage, if GLP-1 use goes mainstream”.

% of **GLP-1 users** vs **Non-users** shifting beverage consumption patterns

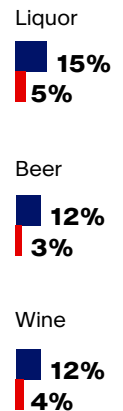
## Drinking Less of:



## Drinking More of:



## Claiming to 'Quit':



■ Users ■ Non-users



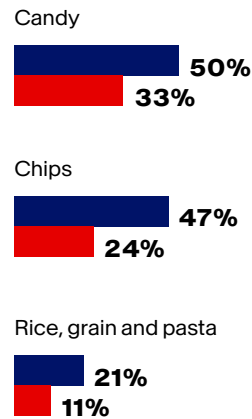
In this new context, what does Thanksgiving or Christmas dinner look like when members of the family are taking GLP-1 drugs? While some patients admitted to pausing their GLP-1 regimes so they could enjoy Thanksgiving dinner last year, the recommendation from doctors is to stay the course. As GLP-1 use becomes more widespread, people may rethink the role food plays in such gatherings.

Health conventions and truisms may need to change, too. Today, the commonly understood metric of health when it comes to weight is BMI—but if the population becomes thinner, there will surely need to be new ways to measure whether consumers are actually healthy at their smaller sizes. “There will need to be lots of education about cardiovascular health, longevity, [and] muscle mass,” Richard Cope, Senior Trends Consultant at Mintel Consulting Group, observes. “It will need to move beyond the simplicity of smaller.”

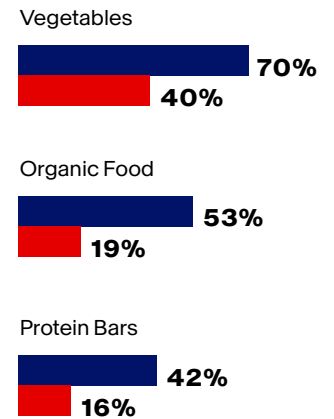
We should expect to see the whole lexicon of health transforming in response with new nutrition labels and codification in health emerging. True muscle health and density may become a new gold standard. Beyond this, health insurance premiums may start to shift if major obesity-related health concerns and necessary treatments are being reduced at scale. Will new insurance products emerge?

**% of GLP-1 users vs Non-users shifting food consumption patterns.**

**Consuming Less of:**



**Consuming More of:**



■ Users ■ Non-users

# Summary

It's difficult to overestimate the impact GLP-1s will have. As we've explored here, it goes way beyond weight loss and health. This group of drugs is likely to impact just about every industry. It will create new lifestyle verticals, cultural norms, and consumer behaviors. But with this shift—or explosion should we say?—there will also be a host of new challenges for brands. They will need to think about new consumer typologies. New ideas about perceptions of health. There will be new discussions about inclusion, especially while GLP-1 drugs remain expensive. And there will be new needs for products and services in abundance. What does this mean for marketers?

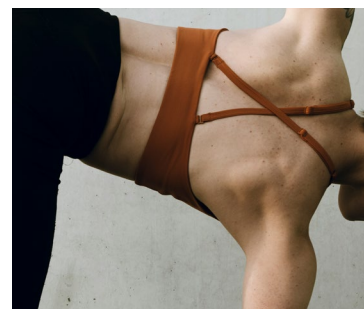
## GLP-1s: 10 things you need to know

Just as the Covid-19 pandemic created seismic changes in the way products were marketed and sold, and generated new vertical markets, GLP-1s will too. These changes will be here to stay. With this in mind, here are nine points marketers need to remember:

1.

### Shape shifters: Get a GLP-1 plan

All early indicators suggest that nearly every market vertical could be impacted by these new drugs. The adjacent markets of near-term importance—diet, health, foods, beverages, well-being, and fitness—need a GLP-1 strategy, beginning yesterday. What long-term implications will this have for your business and your relationships with customers? Equinox is already shifting its strategy to reframe exercise around GLP-1-related rapid weight loss, and muscle density. Entire categories may need to reframe their proposition.



2.

### CPG and lifestyle categories are set to transform

GLP-1s will create a whole new relationship with companies creating health products, foods, travel, fashion, and more. Companies in these categories must act fast to anticipate the adjacent demands that come with rapid weight loss and management.



3.

### Prepare for a new era of body and beauty standards and ethical questions

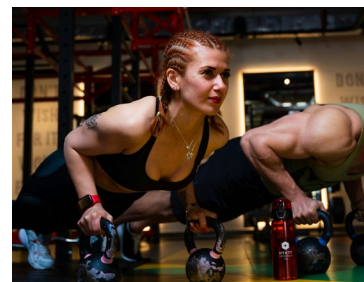
Brands will have to remain sensitive to wider consumers audiences—not all of whom will be adopters. Both users and non-users of GLP-1s agree that obesity is one of the most concerning health issues of our time, but they also told us they generally feel overweight people are discriminated against in society. Marketers have already had to radically rethink how they talk about body and beauty standards, and now GLP-1s are tearing up the rulebook. What does inclusion look like when thinness is a viable product—not just an aspiration—for those with the financial means?



4.

### Cue new product verticals, pricing, and accessibility

We will see a reduction in obesity-linked diseases such as heart failure, type 2 diabetes, and sleep apnea, which will have a negative impact on sales and market opportunities for these conditions. Pharma companies will develop separate business units focusing on GLP-1s and other related platforms such as new health insurance packages that reward consumer participation.



5.

## GLP-1s are a Zeitgeist, not just a group of medications

We must remember that this may be a health phenomenon, but it is also a huge cultural one. One, that will radiate through celebrity, popular discourse, lifestyle, media critique and beyond. Navigating new values, the nuances of language, representation, and everything in between around GLP-1s will become essential, blending nuance, beside bravery, sensitivity, and a continuous understanding of shifting sentiment.



6.

## Uberization of health: Consumers take the reins

The rise of direct-to-consumer services offering access to this medicine reflects a growing power shift where consumers are more empowered to take control of their health. Healthcare providers will need to reframe their tone and services to suit a more confident consumer.



7.

## Meet tomorrow's health metrics

Today the BMI is a universal marker of health. But as consumers lose weight en masse, metrics on muscle mass and tone, organ health, and general fitness will come to the fore. Nutrition labels will also need to adapt to help people with reduced appetites nourish themselves.



8.

## Learn the new language of health

GLP-1s are prescribed for obesity or diabetes, but they also give patients the opportunity to upgrade their life more broadly. This health technology enables—rather than corrects—and allows people to expand their lifestyles. It could also lead to a new definition of metabolism. Health marketing will focus on what possibilities these new drugs can provide.



9.

## Weight loss drugs are tomorrow's health technologies

This group of drugs is developing at the same warp speed as big tech and AI. Pills may replace injections, and in a number of likely scenarios their cost will come down. Don't think of these drugs as a one-off medication. They are likely to be part of a new daily regimen.



10.

## Inclusivity will be the next focus

Currently, GLP-1s are at the disposal of affluent consumers. As the far-reaching health benefits become more established and recognized, access will expand. Affordability could yet become a key focus.





## About the Study

Havas partnered with Market Probe International in May 2024 to conduct a quantitative survey among GLP-1 users and non-users, aged 18 years or older, across the United States. This was not a clinical study but a self-reported questionnaire on usage, behaviors and perceptions. The survey sample was made up of 104 GLP-1 users and 579 non-users.

Among GLP-1 users 54% qualify as Prosumers (vs 17% non-users). Most appear to be early adopters and consider themselves influential and likely to have significant influence in driving adoption of GLP-1 use.

---

### More information on this study, visit:

[www.glp1.havashealth.com](http://www.glp1.havashealth.com)

## Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They have been a focus of Havas studies for two decades. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now.

---

### For more questions, key contacts:

#### **Jules Mayer-Janovic**

Head of Communication,  
Havas Health & Havas Creative  
[jules.janovic@havas.com](mailto:jules.janovic@havas.com)

#### **Laure Ayel**

Head of Global intelligence  
and innovation,  
Havas Creative Network  
[laure.ayel@havas.com](mailto:laure.ayel@havas.com)

---

### More from Havas

Prosumer Reports is a series of thought leadership publications by Havas—part of a global initiative to share information and insights, including our own proprietary research, across the Havas network of agencies and client companies. Havas is one of the world's largest global communications groups, bringing together nearly 20,000 people in more than 100 countries. For more information, visit [Havas.com](http://Havas.com) or follow Havas on [LinkedIn](#) and [Instagram](#).