Prosumer Report

HAVAS

2024

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.

Even just a few years ago, would anyone have believed that a medication capable of magically inducing mass consumer weight loss would soon exist? A class of injections that could transform the lives of those who had struggled for years with extra weight? At the same time, solving a slew of associated comorbidities and chronic health concerns that burden health systems around the world? It's unlikely. Yet GLP-1s are here, and in a short space of time they have become a global phenomenon.

The scale of the opportunity

The current indicated uses of GLP-1s are for Type-2 diabetes and obesity, but their promise goes way beyond these two foundational applications. It is also thought they could treat everything from addiction to dementia, boost birth and libido rates, reinvent the food chain, and reduce pressure on the environment through lighter consumption patterns. In addition, they may create an existential crisis for diet brands and bring entirely new consumer behaviors into being—like normalizing injecting a medication at home, which was something previously limited to a doctor's office or to those with chronic diseases.

A lucrative ecosystem has been rapidly launching around these drugs as brands create a new demand among consumers—not just celebrities—for plastic surgery, with nips, tucks, and lifts a growing necessity to correct and optimize rapid body transformation.

We are yet to fully understand the long-term implications of these drugs—but there is no doubt they will be far-reaching. As Brian S. Robinson, Global Chief Strategy Officer and Head of Growth at Havas Health, observes, "No other drug class holds as much potential to revolutionize lives on such a massive scale. While these medications are currently viewed through the lens of weight loss, their impact promises to extend far beyond, leading to a potentially significant reduction in health events, e.g., heart attacks, stroke, etc., and novel applications in treating chronic kidney disease, sleep apnea, Alzheimer's, addiction, and more."

While AI has dominated press headlines as the most disruptive technology in human history, GLP-1 medications (which includes Ozempic, Wegovy, Mounjaro, and Zepbound) have been steadily setting the foundation to radically transform the world we live in.

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> **—BRIAN S. ROBINSON, GLOBAL CHIEF STRATEGY OFFICER AND HEAD OF GROWTH AT HAVAS HEALTH**

> *Anti-obesity market is shaping up to be one of the most lucrative opportunities in the history of the biopharma sector.*
>
> **—FORBES MARCH 2024**

$105 billion

analysts' expected market value for GLP-1s by 2030

31.5 million people

Estimated portion of the U.S. population (around 9% of total) that will be taking GLP-1s by 2035

A world where we can treat obesity—the ambient driver of a number of different health conditions—now feels like a plausible reality. Our world, which has been increasingly designed to accommodate and celebrate growing body sizes and types, may need to dramatically reset for a slimmer population. It's hard to think of something with a bigger audience and potential impact unless it's an immortality pill—but the Silicon Valley billionaires are working on that, too.

At Havas, we started exploring the GLP-1 phenomenon with our inaugural GLP-1 Prosumer research study (conducted in May 2024 among GLP-1 users and non-users, ages 18 years or older, across the United States). The results were as compelling as the financial projections for the market at large.

Morgan Stanley analysts expect the market for GLP-1s to be worth a staggering US $105 billion by 2030. They also estimate that 31.5 million people—around 9% of the US population—will be taking GLP-1s by 2035. Analysts believe the anti-obesity market is shaping up to be one of the most lucrative opportunities in the history of the biopharma sector. There are now 880 million obese adults worldwide, with 42% of American adults considered to be obese.

81% agree

Obesity is one of the most concerning health issues of our time.

In our Prosumer study—81% of respondents rank obesity as one of the most concerning health issues of our time.

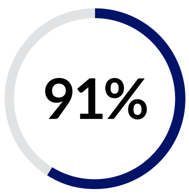
By 2035, it's expected that more than half of the world's population will be obese. The need for GLP-1s is growing.

Revolutionizing the discussion around weight loss

"Weight reduction has long been a challenging target for the biopharma industry," according to Robinson. "Prior entrants had unattractive side effects, safety concerns, limited weight reduction, and never established a market presence," he explains. "What makes GLP-1s so very different is their profile. They first launched as a diabetes medication, so they have a solid track record of use in real-world populations."

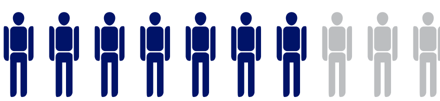
In addition, most consumers are already aware of GLP-1s, meaning they could soon be mainstream drugs. According to Havas' research, only 12% of non-users have never heard of injectable drugs that can help people lose weight such as Ozempic, Wegovy, or Zepbound.

"Elon Musk talked about the shift from human to digitally derived intelligence through AI recently. But look at the CEOs, and the vast majority said their business models were not nearly so impacted by AI as was speculated," says Anna Whiteman, Partner at the leading venture capital company Coefficient Capital. "But Ozempic and this group of drugs are happening and affecting real people in big and measurable ways. AI, relative to Ozempic, has overpromised and under-delivered."

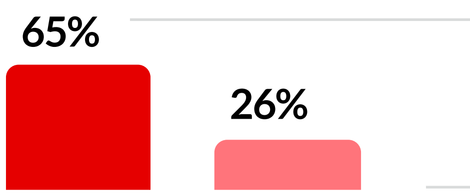


of **GLP-1 users** are extremely/highly satisfied with their current treatment

7 out of 10



users would recommend their GLP-1 drug to others



Prosumers **2x** more likely

of **Non-users** Prosumers*

of **Non-users** Mainstream

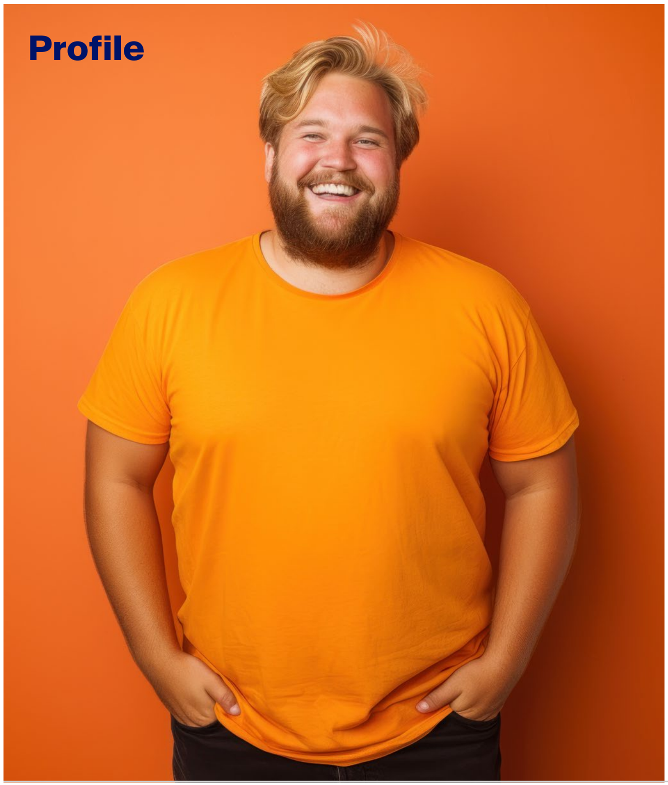
are willing to start and try a GLP-1s treatment

*At Havas, we define Prosumers are today's leading influencers and market drivers. Beyond their own economic impact, Prosumers are important because they will 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.

Understanding the GLP-1 users

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

Profile



Male 64%

37 Average age

White 78%

College or higher 57%

Urban/City 42%

>$70k HH income 66%

Lean Left 48%

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:

Statement	Users	Non-users
Offer people a safe and healthy way to lose weight	91%	47%
Provide people with health benefits beyond weight loss such as preventing other illnesses and diseases	85%	50%
Should not be limited to people who have been diagnosed with obesity or diabetes and be accessible to everyone	59%	37%
Should only be prescribed to people who have been diagnosed with obesity or diabetes	45%	58%

■ Users ■ Non-users

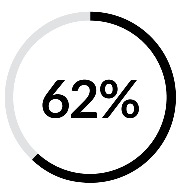
> *These innovations will create a whole new set of cultural codes and consumer behaviors that brands will need to navigate, not least that there might be a counter movement. It will also create new ethical questions about how to connect to the cultural impact of these drugs. It will require brands to embrace complexity and nuance in the extreme.*
>
> **—MARK SINNOCK, GLOBAL CHIEF STRATEGY, DATA AND INNOVATION OFFICER AT HAVAS CREATIVE NETWORK**

Goodbye, body positivity?

So what does this mean for brands and marketers? What becomes of the body positivity movement—embraced by just about every lifestyle brand—when bigger bodies are a choice, not a circumstance? Already, pop culture is being rocked by complicated feelings about celebrities from Oprah to Kelly Clarkson, who became famous for celebrating their fuller figures, losing weight.

"The last few years, brands have adapted their strategy to make allyship, purpose, and authenticity central," says Mark Sinnock, Global Chief Strategy, Data and Innovation Officer at Havas Creative Network. "These innovations will create a whole new set of cultural codes and consumer behaviors that brands will need to navigate, not least because there might be a counter movement. It will also create new ethical questions about how to connect to the cultural impact of these drugs. It will require brands to embrace complexity and nuance in the extreme."

In recent years, US healthcare concierge platforms like Calibrate and Fella have reframed the dialogue around weight loss to be more nuanced and empowering in defiance of the simplistic "move more, eat less" messaging. These brands take a more holistic assessment of psychology, metabolism, hormones, and body type. GLP-1s look set to advance this approach even more as celebrities and influencers alike discover success—and relief—with effective treatment, all without being critiqued for lack of willpower or motivation. In this atmosphere, obesity is not something to be punished for, but something brands can offer practical, nonjudgemental help with.



Agree overweight people are **discriminated** against in our society today

Non-users seem judgemental towards GLP-1 users

% of **Non-users** who agree with the following statements about GLP-1 users:

GLP-1 users are influenced by societal pressure to achieve a certain body image

60%

GLP-1 users are being influenced by the media and celebrity hype around the drugs

59%

GLP-1 users are prioritizing weight loss over potential long-term health risks

59%

GLP-1 users are more focused on appearance than overall health

52%

"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."

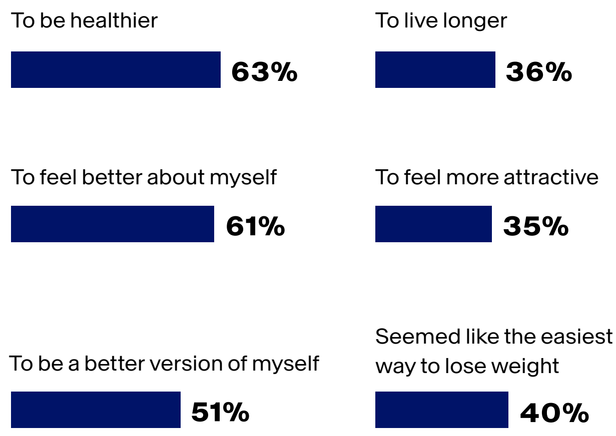
This brings us back to the point of how significant a role culture will play in how brands navigate the changing landscape. The "Progress Culture" has been taking over much of consumers' purchase behaviors driven from a get-it-done attitude. A need for immediate accomplishments is fueling a desire in 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:



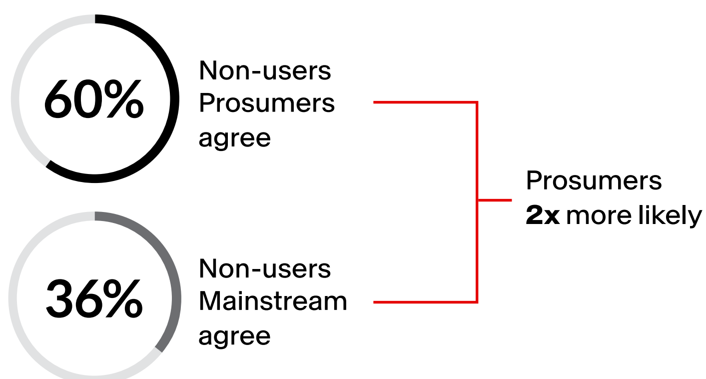
Obesity: A new economic divide

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 infux 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



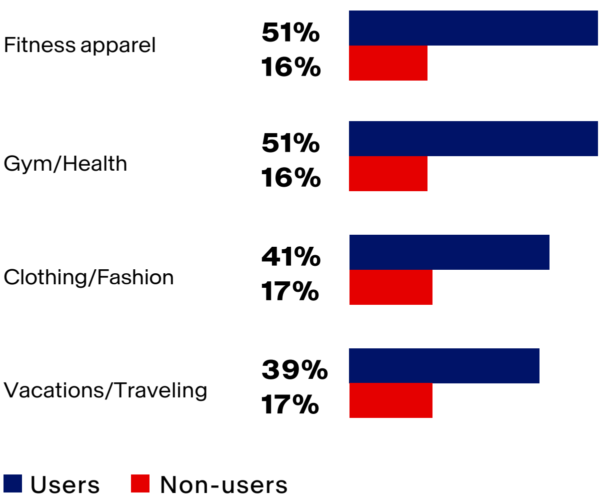
Weight control: A widening industry

“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.

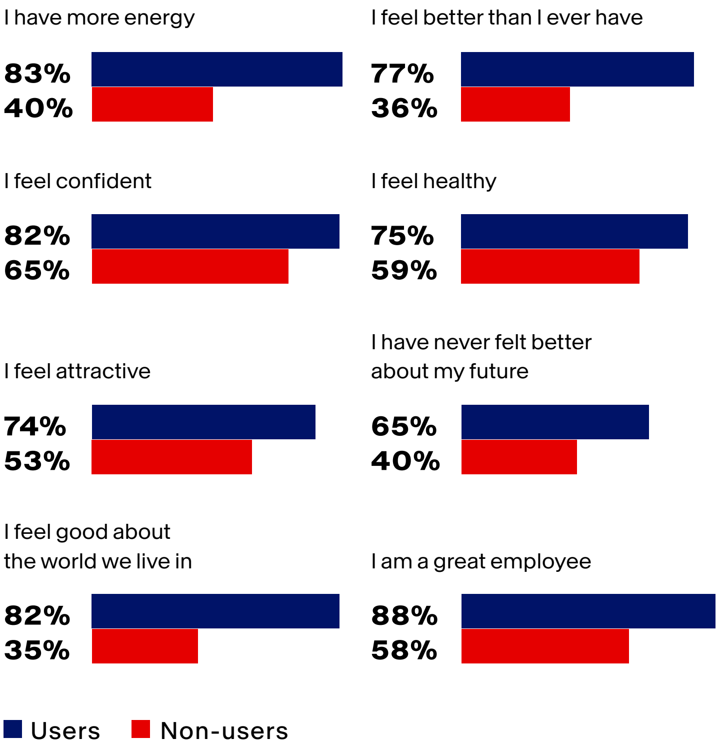
When people take GLP-1s, the impact on their entire lifestyle, is massive. This represents opportunities for multiple industries:

% 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

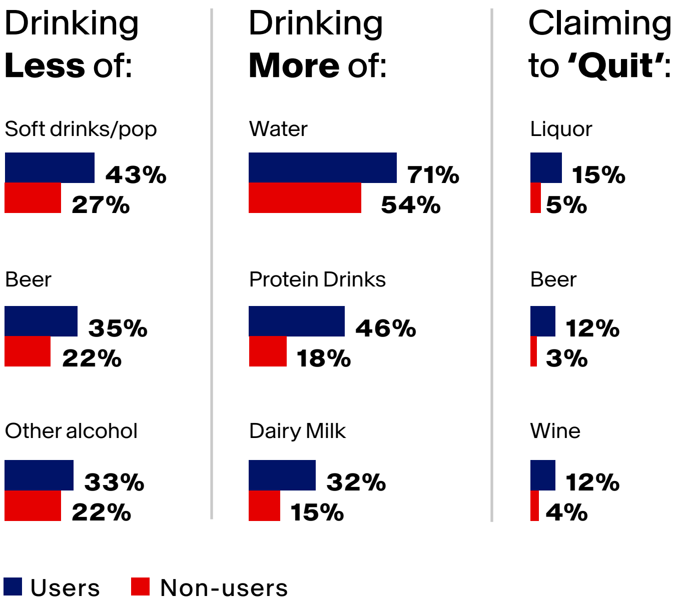


The Me-conomy of health: Building Meaningful Brands™ in the GLP-1 era

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

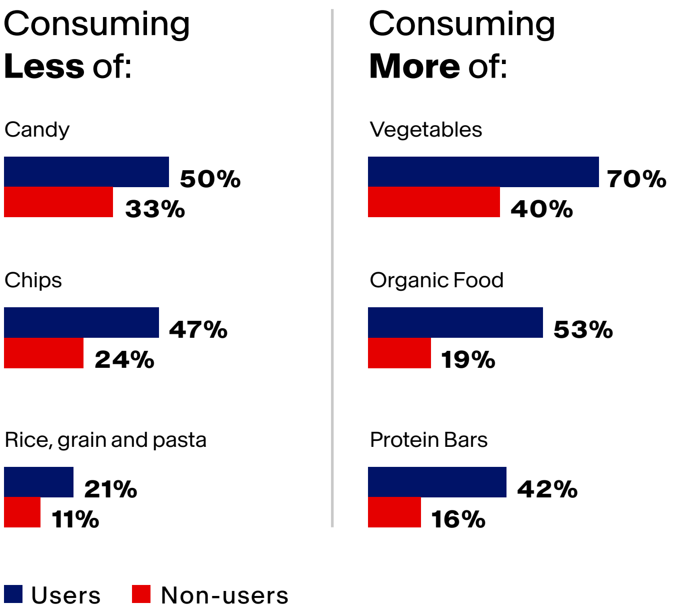


In this new context, what does Thanksgiving or Christmas dinner look like when members of the family are taking GLP-1 drugs? While some patients admitted to pausing their GLP-1 regimes so they could enjoy Thanksgiving dinner last year, the recommendation from doctors is to stay the course. As GLP-1 use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



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 ten 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.

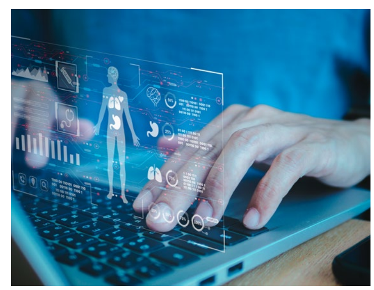
Meet tomorrow’s health metrics

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.

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 information on this report, visit:

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