



# THE GLP-1 EXPLOSION

Understanding the landscape, the stakes,  
and the power of premium video for Pharma & Healthcare



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*for Pharma & GLP-1s*

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# GLP-1

# Defined

What is a GLP-1?

**Glucagon-like Peptide-1 (GLP-1) agonists** are medications that help lower blood sugar levels and promote weight loss<sup>1</sup>



**Brand Name GLP-1s** are FDA-approved using auto-injectors and now oral pills (e.g., Wegovy, Zepbound, etc.)<sup>2</sup>

**Compounded GLP-1s** were developed in response to supply shortages, and are not FDA-approved, though the ingredients are (sold by co's like Hims & Hers)<sup>3</sup>

What Conditions do GLP-1s Treat<sup>4</sup>

CURRENT

Type 2 Diabetes

Chronic Weight Management

UNDER EVALUATION

Cardiovascular

Sleep Apnea

Kidney Disease

PCOS

Liver Disease

Substance Abuse

The GLP-1  
**WEIGHT LOSS EXPLOSION**  
is in full swing, and it's only the beginning

18%

of US adults have tried a  
GLP-1 as of 2025<sup>1</sup>

43%

of people with obesity who  
have not tried GLP-1s are  
interested in taking it<sup>1</sup>

7%

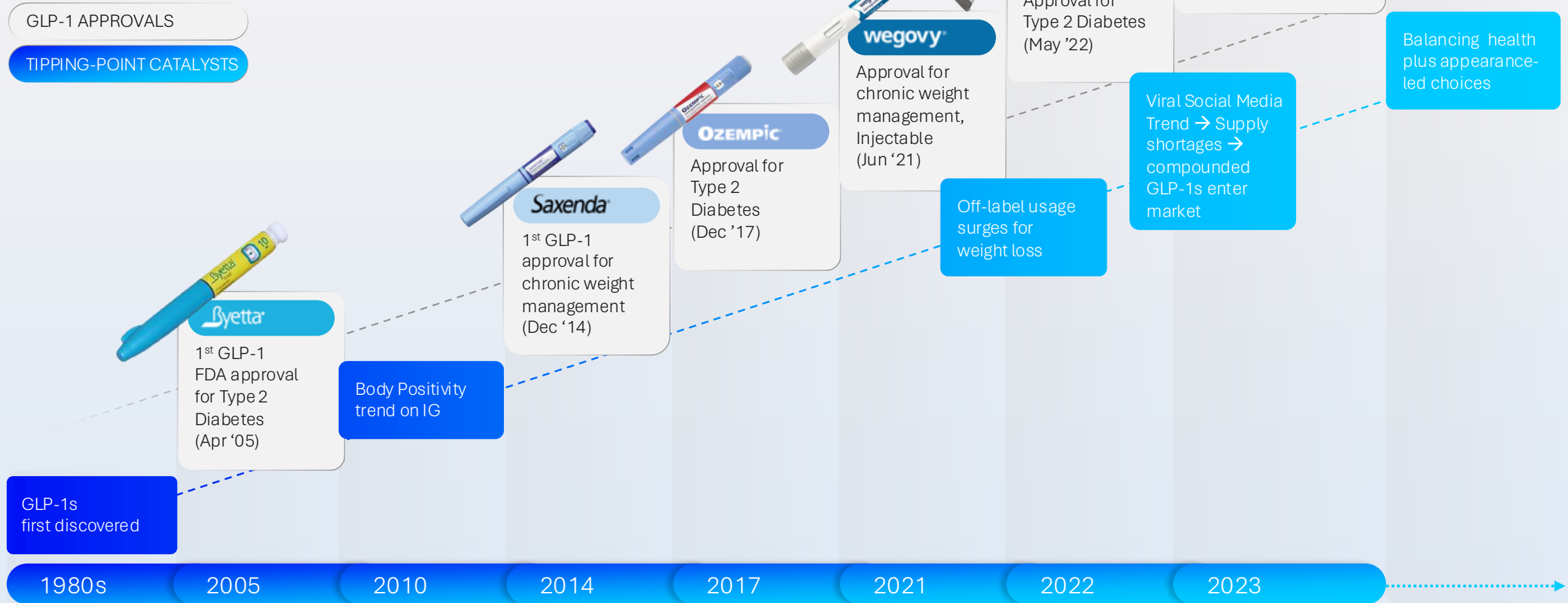
of all scripts in the US are  
GLP-1 drugs in 2025<sup>2</sup>

+500%

rise in consumer spending  
on GLP-1s (2018-2023)<sup>3</sup>

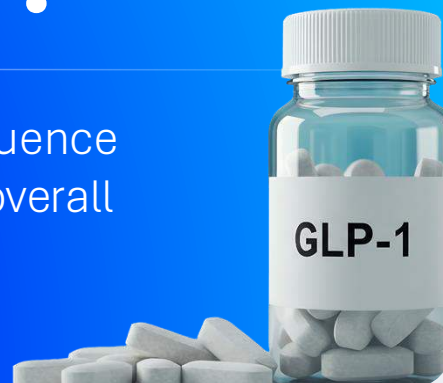
# DID YOU KNOW?

## GLP-1s have been around since the 1980s



# How did **GLP-1s TAKE OFF?**

Increases in societal/cultural influence and R&D, improved access and overall health, lit the GLP-1 match



## Health

“There's a huge pipeline of new medications that are coming,”

**Dr. Melanie Jay**  
NYU Langone Director on Obesity Research<sup>4</sup>

FDA APPROVALS RISING

# 700%+

# of ppl without Diabetes using GLP-1s for Weight Mgmt. (2019-2023)<sup>1</sup>



Lowers risk for heart attacks and stroke + systemic issues

OFF-LABEL USAGE/SCRIPTS

BETTER HEALTH RIPPLE EFFECT

## Society & Culture



CELEBRITY USAGE



SOCIAL INFLUENCE<sup>2</sup>

## Access

# 43%

of companies with 5K+ employees now cover weight mgmt. GLP-1s (+15% 2025 vs. 2024)<sup>5</sup>

MORE COVERAGE

# 1/3

of GLP-1 users with <\$45K HHI; 44% >\$75K<sup>6</sup>

BEYOND THE WEALTHY

# -30%

in direct-to-consumer prices stemming from pricing pressure & expected to drop further<sup>7</sup>

LOWER PRICES

# 4x

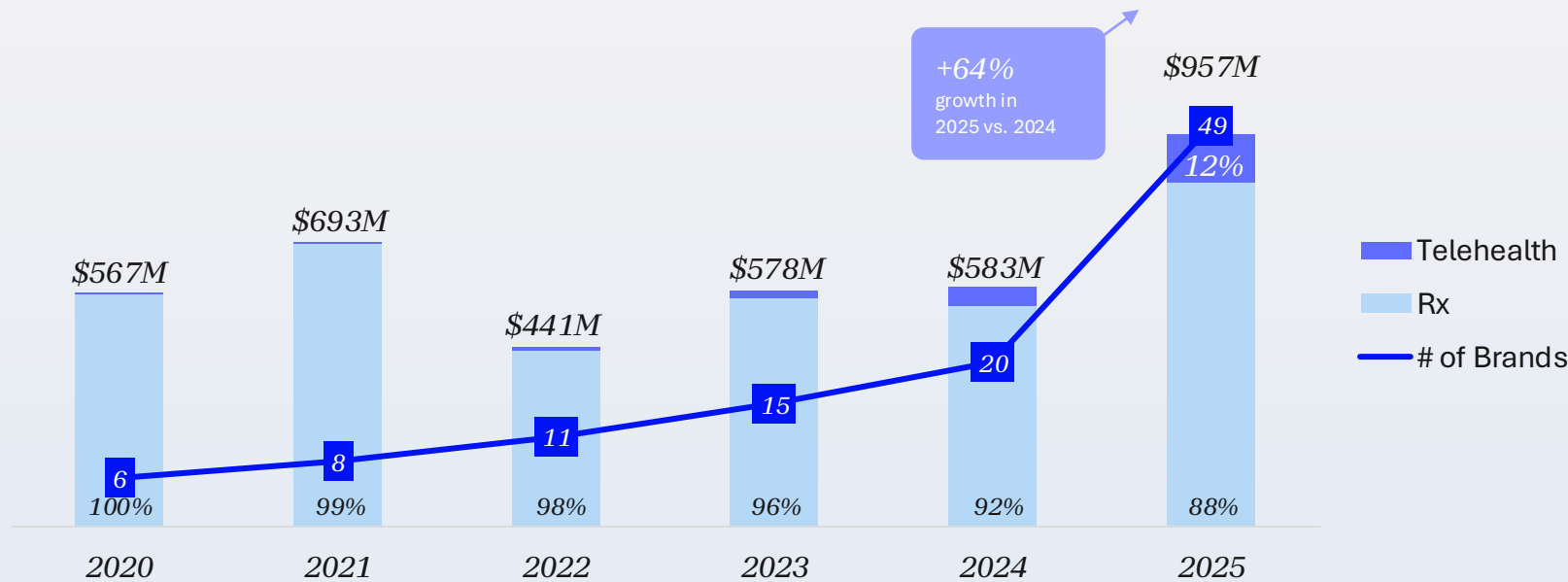
growth in telehealth companies that offer GLP-1s for WM (2025 vs. 2023)<sup>8</sup>

TELEHEALTH SURGE

**Did you know?** Google search terms for Ozempic spiked in 2023, GLP-1s in 2025<sup>3</sup>

As popularity for GLP-1s increased,  
**SO DID MEDIA INVESTMENT**

GLP-1 Media Spend



**+11%**

5-year CAGR for GLP-1 media spend 2020-2025

**+2.5x**

Growth in the number of cos advertising GLP-1s 2025 vs. 2024

**+12pp**

Share gained by telehealth companies offering GLP-1s 2025 vs. 2020

Top Pharma Brands (2020-2025)



**OZEMPIC**  
 semaglutide injection  
 Type 2 Diabetes

**RYBELSUS**  
 semaglutide tablets  
 Type 2 Diabetes

**wegovy**  
 semaglutide injection 2.4 mg  
 Weight Mgmt.



**mounjaro**  
 Type 2 Diabetes

**zepbound**  
 tirzepatide injection  
 Weight Mgmt.

Top Telehealth Brands (2020-2025)

**hims & hers**

**mochi**  
 HEALTH

**ro**

Account for 83% of telehealth spend

When it comes to GLP-1 ad spend,

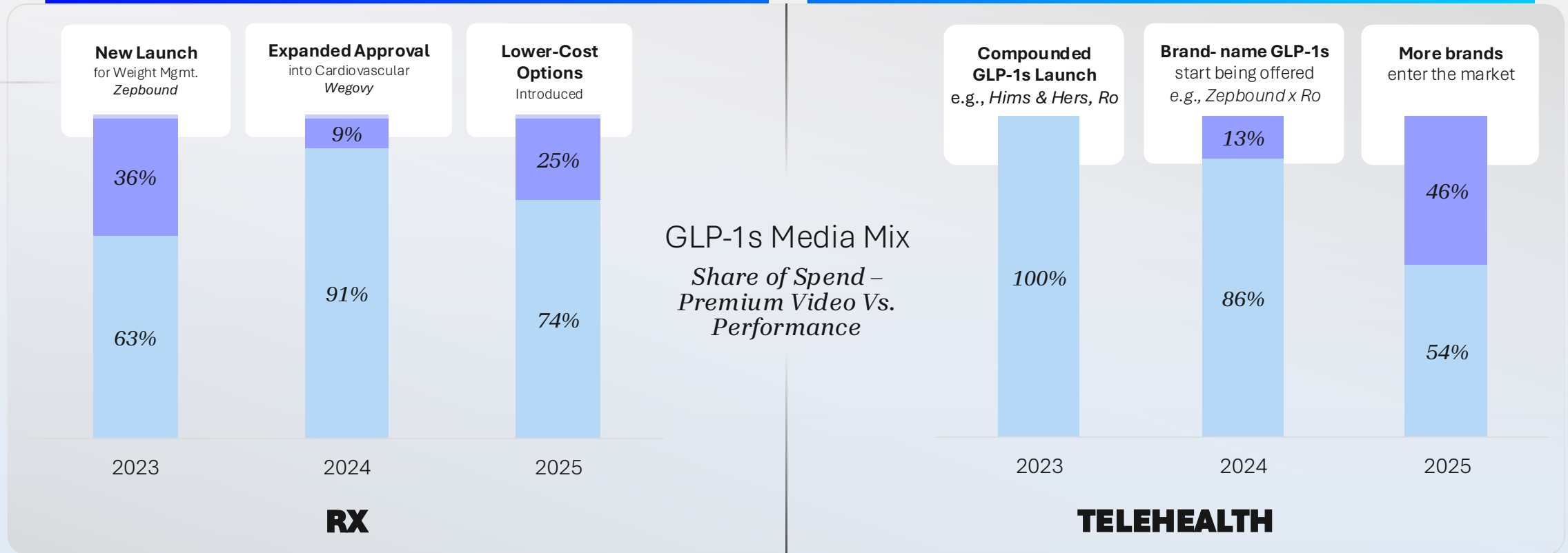
# TELEHEALTH BRANDS ARE LEANING MORE INTO PREMIUM VIDEO

to align with pharma's launch playbook

KEY HAPPENINGS

## Premium Video Spend Driven by Cultural Moments

## Influx of Telehealth Players Driving Performance Spend



2 Pharma Brands in 2025 (*Lilly & Novo*)

38 Telehealth Brands in 2025 (*Hims & Hers, Ro, Mochi*)

LEGEND Premium Video Performance Other

As the market becomes more crowded, demand increases, & acceptance rises,  
**CULTURAL MOMENTS ROOTED IN PREMIUM VIDEO HELP GLP-1S STAND OUT & DRIVE BROAD REACH**

**DID YOU KNOW?** GLP-1 spend on sports linear networks doubled in 2025 vs. 2020 as brands lean into culture

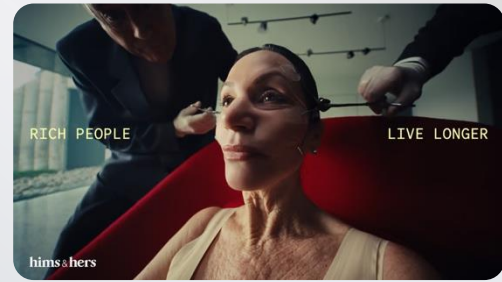
Sports 



[Novo Nordisk's](#) Super Bowl spot for its new Wegovy pill features multiple celebrities



[Eli Lilly's](#) Zepbound ad ran during the Super Bowl pre-game and streaming coverage



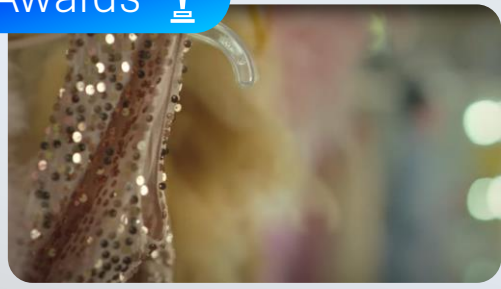
[Hims & Hers'](#) 2026 Super Bowl ad tackles health affordability and nods to its compounded GLP-1s



[Ro's](#) Super Bowl spot features brand ambassador, Serena Williams, to highlight the benefits of GLP-1s



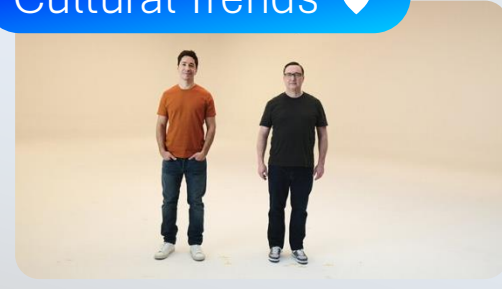
Awards 



[Eli Lilly's](#) "Big Night" aired during the Oscars in 2024, taking aim at the cosmetic use of GLP-1s, particularly in Hollywood



Cultural Trends 



[Novo Nordisk](#) leaned into nostalgia with its 2026 Ozempic campaign that takes inspiration from Apple's "Get a Mac" campaign from the early 2000s



And looking ahead,  
the GLP-1 Industry is set to  
**ACCELERATE FURTHER**

More Drugs  
Enter the Market

*~16*

GLP-1 drugs from 7 pharma companies likely by 2032 compared to 8 drugs from 2 companies in 2026<sup>1</sup>

More People  
Expected to Try

*1 in 4*

US adults are expected to have tried GLP-1s by 2030<sup>2</sup>

More Sales  
Driven by the US...

*\$126B*

GLP-1 sales estimated by 2029, 30% CAGR (2023-2029), with surge mainly in US<sup>3</sup>

...and the  
Most Popular Drugs

*\$100B*

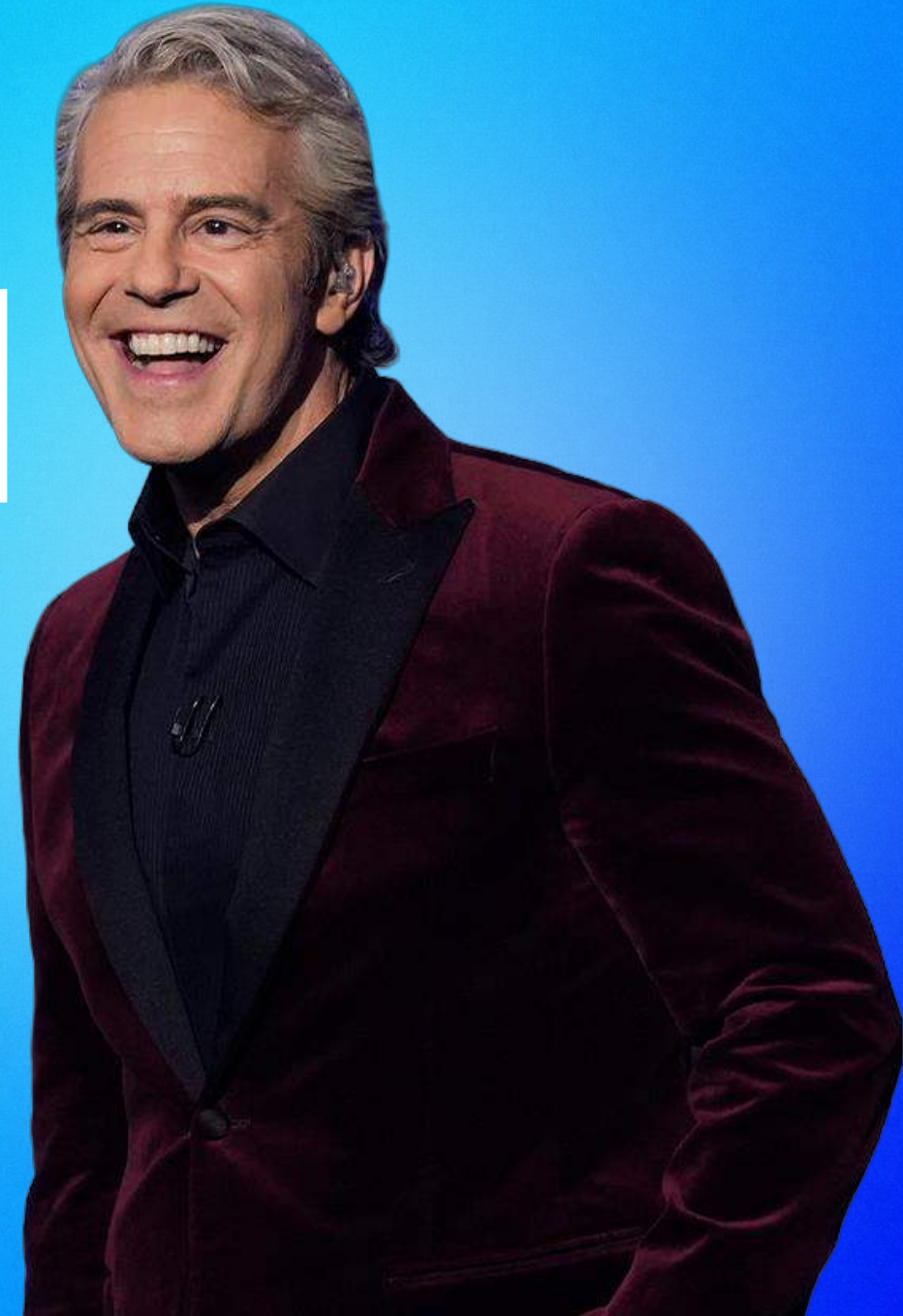
In sales projected from just 5 metabolic diseases drugs by 2030<sup>4</sup>



*The Power of*

# PREMIUM VIDEO

*In a crowded Pharma Category & GLP-1  
market, premium video sets the foundation for  
sustainable growth*



# Premium Video, especially TV, continues to be a **TOP SOURCE** for medication awareness, education, and action

A trusted source when healthcare decisions matter

Healthcare Ads  
Drive Patient Actions

**61%**

Of Americans take action after being exposed to healthcare advertising including



Made an appointment to see a doctor (10%)



Refilled a prescription (10%)



Visited health information website (8%)

TV Is A Source Of Discovery For Healthcare Information

**Top 3**

TV ads rank as a top-3 source for learning about prescription drugs

**+50%**

TV is more likely to be a source of discovery for healthcare info vs. social



Doctor or healthcare professional (#1)



Health information website / app (#2)



TV Ads (#3)

And as a top source for action,

# PREMIUM VIDEO DRIVES CONSIDERATION FOR PHARMA

## via Branded Search

delivering impact in line with spend, led by NBCU's strong performance

### +14%

+5% for overall pharma brands vs. competitive networks

#### MORE LIKELY TO SEARCH

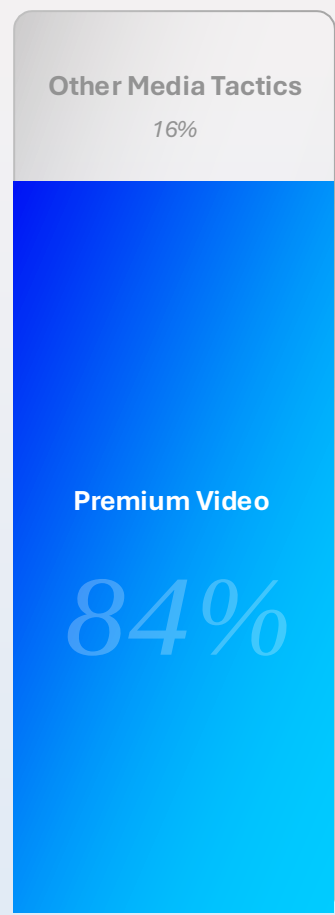
for GLP-1 brands online after campaign elements air on **NBCU** vs. competitive networks

### 1=1.7

1.8 for overall pharma brands vs. competitive networks

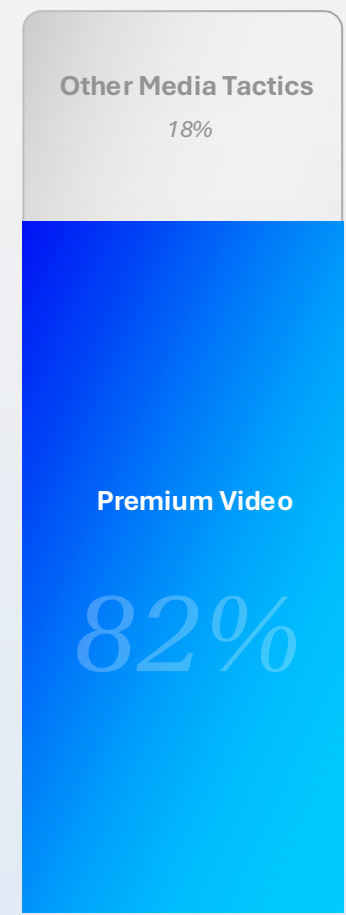
#### AD MULTIPLIER

GLP-1 ads required competitively to generate same search impact as ad elements on **NBCU**



**INVESTMENT**  
Share of Media Wallet

**1:1**  
Premium Video punches its weight, delivering mid-funnel impact in line with investment.



**CONSIDERATION**  
Share of Media Driven Search

Source: Gain Theory MMM Study – Pharma Category across 3 brands with 3+ year lookback period, average of category level performance. EDO. Measured Prescription Pharmaceutical brands on NBCU Linear Networks (2025FY)

# Premium Video propels

## **GREATER INCREMENTAL PRESCRIPTIONS**

per impression, with strong short-term impact for the category across linear & streaming

Premium Video

*Linear + Streaming*



**+79%**

*vs. social*

Linear

*Cable + Broadcast*



**+58%**

*vs. social*

Streaming

*AVOD*



**+3.6x**

*vs. social*

*Effectiveness = The incremental prescriptions for every advertising impression*

# Premium Video demonstrates **STRONG SUSTAINED GROWTH FOR PHARMA** per impression, with strong short-term impact for the category across linear & streaming



## Long Term **Effectiveness**

# 3.5x

Higher Premium Video  
Effectiveness in LT vs ST

## Long Term **Multiplier**

# +2%

Premium Video  
vs. Social

# +9%

Premium Video  
vs. YouTube

*Effectiveness = The incremental prescriptions for every advertising impression*

# KEY TAKEAWAYS

Premium Video as the foundation for growth for Pharma & GLP-1s

The Top Source

for Medication Awareness,  
Education & Action

Key Driver of  
Consideration

via Branded Search

Greater  
Script  
Conversions

for Pharma in the short term

Sustained  
Growth

through brand & engagement

Cutting Premium Video  
Reduces Overall  
Performance







NBCU's **BEST-IN-CLASS CONTENT & CAPABILITIES** drive stronger performance for advertisers

NBCU's premium tactics & offerings drive its performance

**+11%**

NBCU Overall vs. Competitive Premium Video Short Term Efficiency

vs. NBCU Overall

<b>+4%</b>	 <p><b>Peacock</b> Short Term Efficiency</p>
<b>+14%</b>	 <p><b>Big Events</b> Short Term Efficiency</p>
<b>+19%</b>	 <p><b>Advanced Audiences</b> Short Term Efficiency</p>
<b>+49%</b>	 <p><b>Ad Innovations</b> Short Term Efficiency</p>

Efficiency = The incremental sales for every advertising dollar spent

Source: (1) ROAS TransUnion MMM Study – Insurance and Finance Category across 24+ brands with 3+ year lookback period, average of category level performance (2) Short Term Efficiency Gain Theory MMM Study – average across QSR, Retail, and Pharma Categories

We have a **TEAM OF EXPERTS** who understand the pharma & Healthcare landscape



Award-winning, **CREATIVE & MARKETING** teams who help drive your business forward

Crafting  
Bespoke  
Pharma  
Solutions

Fostering  
Continued  
Learning

Sharing  
Industry  
Insights &  
Trends

Delivering  
Award-  
Winning  
Partnerships

# Leverage the Power of NBCUniversal's Content & Audiences to Drive Impact for your Brand & Business

## 2026 OPPORTUNITIES FOR PHARMA & GLP-1S

### Strategic Recommendations

Leverage the Power Of NBCU's Content & Audiences to Drive Proven Impact



Achieve Scale & Precision, While Measuring Full Funnel Impact



### Key Audiences

Reach & Engage Healthcare Professionals on NBCU

**REACH HEALTHCARE PROFESSIONALS WHERE THEY'RE WATCHING**  
with flexible data-driven targeting across NBCU's premium streaming footprint

1 Audience targeting	2 Strategic targeting	3 Contextual targeting	4 LinkedIn/CM Selects NBCU/CM targeting
Reach 1:1 connections with HCPs through precision audience targeting across NBCU streaming.	Maximize the reach of your HCP audience by combining 1:1 audience targeting with targeting against your audience.	Drive relevant connections by aligning your brand with relevant NBCU content by genre (drama, comedy, medical, health, and life science) to reach your target.	Target to reach 1:1 connections programmatically with our audience reach to reach 10 professional audiences with NBCU's premium content.
Addressable delivery using targeted programmatic ads across NBCU's IP, mobile, and/or connected TV data.	Addressable delivery to the right audience + intent-based delivery through the content that the target audience consumes the most.	Delivery through packages of relevant content to drive share of voice or to drive brand to industry category.	Campaign managed by LinkedIn and enhanced targeting through LinkedIn Campaign Manager.

Connect with HCPs beyond their professional through the NBCU content they love

NBCU's premium content	HEALTHCARE PROFESSIONALS ARE WATCHING MORE	GENRE	BRANDS	PROGRAMMING
Viewers watched 20% more premium content on NBCU	Higher audience engagement on NBCU	Drama (20%) Sports (20%) Reality (17%)	CMSC (11%) USA (10%) NBCU (10%)	Top 10 Pharma (20%) Top Pharma (20%) Brand Name (20%)

Stay Top-of-Mind with Multicultural Audiences



### Innovation

Stand Out in a Crowded Marketplace via Ad Innovations



Align with Brand Suitable Contextually Relevant Content on NBCU Streaming





# THANK YOU!

For questions, please reach out to the

Pharma & Healthcare Category Strategy Team:  
Megan Ryan, Nikita Tolani, Melissa Perron, Melissa Roth

Insights & Measurement Team:  
Priscilla Aydin, Vignesh Kumar, Christina Shanker, Ashley Delaney



# GLP-1 OVERVIEW *as of March 2026*

## Current Pharma Companies w. GLP-1s

Lilly & Novo Nordisk

## Current GLP-1 Brands

- Lilly (Zepbound: Weight Mgmt.; Mounjaro: Type 2 Diabetes)
- Novo (Wegovy: WM; Ozempic & Rybelsus: T2D)

## Companies with GLP-1s Under Review

Amgen, AstraZeneca, Pfizer/Metsera, Roche

## Treatment Types

- Type 2 Diabetes
- Chronic Weight Management
- Cardiovascular
- Kidney Disease
- Liver Disease
- Sleep Apnea
- Polycystic Ovary Syndrome
- Substance Abuse

## Telehealth Cos that sell Brand and/or Compounded GLP-1s for Weight Mgmt.

- Ro
- Calibrate
- Noom
- WeightWatchers Clinic
- Hims & Hers
- Found
- GoodRx
- Walgreens Weight Management
- CVS MinuteClinic
- Mochi Health
- LifeMD
- PlushCare
- Form Health
- Eden
- Nurx
- K Health
- Fella Health
- Everlywell Weight Care+
- LeanRx, Inc.
- Medvi, LLC
- RxPros LLC
- Start Gimme, LLC (Gimme Care)
- bmiMD
- TrimRx
- Adonis Health Inc

## Medication Types

- Injectables
- Vials
- Oral pills

## Types of GLP-1s

- Pure agonists
- Compounded

## Industries

- Pharma
- Healthcare
- Beauty & Personal Care
- Beverage
- CPG
- Restaurant
- Retail

Check out

[The GLP-1 Transformation](#)

*For cross-category GLP-1 Implications*

Contact Cynthia Jung

& Nick Cafiero with questions



# The GLP-1 Landscape is **EVOLVING IN REAL TIME**



Novo to knock down Ozempic, Wegovy list prices next year, but self-pay channels unaffected



GLP-1 Envy Was Just the Beginning



Novo Drops Hims & Hers Lawsuit and Will Sell Wegovy on Site



Weight-loss drugs to compete on the biggest stage with Super Bowl ads