



THE GLP-1 TRANSFORMATION

How the shift toward metabolic health is redefining category growth, business portfolios, and media strategies



The GLP-1 **TRANSFORMATION**

Overview

This deck highlights the growth of GLP-1s and how the consumer shift toward metabolic health is redefining category growth, business portfolios, and media/marketing strategies:

1

The GLP-1 Explosion

How GLP-1s moved from niche treatment to mainstream consumer disruptor

2

Category Impact, Implications & Solutions

How GLP-1-driven consumer behavior is reshaping certain categories and how NBCU can help brands respond

3

Internal NBCU Category Implications

What GLP-1 growth means for NBCU's category approach – risks, opportunities, and strategic focus



Beauty &
Personal Care



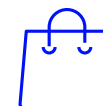
Beverage



CPG



Restaurant



Retail



Pharma

The GLP-1 **EXPLOSION**



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 loss¹



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

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)³

What Conditions do GLP-1s Treat⁴

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, evident through the immense growth we've seen today and expect going forward

Today's GLP-1 momentum is **only the beginning**

18%

of US adults have tried a GLP-1 as of 2025¹

43%

of people with obesity who have not tried GLP-1s are interested in taking it¹

7%

of all scripts in the US are GLP-1 drugs in 2025²

+500%

rise in spending on GLP-1s (2018-2023)³

Looking ahead, the industry is **set to accelerate**

~16

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

\$126B

GLP-1 sales estimated by 2029, 30% CAGR (2023-2029), with surge mainly in US⁶

1 in 4

US adults are expected to have tried GLP-1 by 2030⁵

\$100B

In sales projected from just 5 metabolic diseases drugs by 2030⁷

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 Research⁴

FDA APPROVALS RISING

700%+

of ppl without Diabetes using GLP-1s for Weight Mgmt. (2019-2023)¹

OFF-LABEL USAGE/SCRIPTS



Lowers risk for heart attacks and stroke + systemic issues

BETTER HEALTH RIPPLE EFFECT

Society & Culture



CELEBRITY USAGE



SOCIAL INFLUENCE²

Access

43%

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

MORE COVERAGE

1/3

of GLP-1 users with <\$45K HHI; 44% >\$75K⁶

BEYOND THE WEALTHY

-30%

in direct-to-consumer prices stemming from pricing pressure & expected to drop further⁷

LOWER PRICES

4x

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

TELEHEALTH SURGE

Did you know? Google search terms for Ozempic spiked in 2023, GLP-1s in 2025³

Source: 1. [British Medical Journal](#); 2. [Dr. Jen Caudle TikTok](#); 3. [Google Search Terms](#); 4. [Dr. Melanie Jay on TODAY](#); 5. [KFF Employer Health Benefits Survey, 2025](#); 6. [BTIG survey via Yahoo! Finance](#); 7. [NPR](#); 8. [MediaRadar, Company Websites](#)

As GLP-1s become more accessible, there are **THREE MOTIVATIONS** driving adoption



Medical-Driven Users

Managing obesity, diabetes, blood sugar, cardiovascular disease risk, etc.

60%

of Americans have **either used or expressed interest** in using these medications.¹

45%

of adults 45+ use GLP-1s to **manage their blood sugar**, while 34% use them to **lower the risk** of other health conditions.¹



Lifestyle-Driven Users

Focused on overall wellness (balancing eating & exercise); less likely to be covered by insurance.

33%

of younger adult (18-44) GLP-1 users started using them to **gain more energy** to improve daily functioning.¹

32%

of younger adult (18-44) GLP-1 users started using them to **address challenges with appetite control** or overeating.¹



Image-Driven Users

Prioritizing image, aesthetic, quick & visible results; often self-funded

35%

of current GLP-1 users report **wanting a lifestyle that impresses others** +14pp vs. all adults.²

12%

current GLP-1 are +12% more likely to **strive for high social status** than all adults.²

GLP-1s are reshaping how consumers eat, shop, spend, and engage with health – with ripple effects far beyond pharma

[Click for category-specific trends, insights, and solutions](#)

Beauty & Personal Care

Demand shifts from impulse-driven trends toward high-performance, structural skin health and supplements that support long-term wellness goals.



Beverage

Declining consumption of sugary drinks and alcohol gives way to demand for nutrient-dense, functional, and smaller-format beverages.



CPG

Significant contraction in high-volume, processed foods and a surge in demand for protein-rich, functional, and small-format products.



Restaurant

Demand shifts towards smaller portions and nutrient-dense selections, as consumer preferences move away from quantity and towards intentional, experience-led dining.



Retail

Value and product flexibility become the priority as sizes & inventory mix fluctuate. Shoppers lean into fast fashion, resale, and cheaper alternatives.



Pharma

High demand influencing strong growth, with established players expanding medications / indications, as well as telehealth brands jumping in.



Category Impact, Implications & **SOLUTIONS**



Cross-category Summary

GLP-1 Adoption is **RESHAPING MARKETING PLAYBOOKS**

Brands must reframe who they reach, what they say, and how they demonstrate value.

Re-Defining and Reaching the Right Consumer

GLP-1 adoption is creating a new, cross-category consumer **defined less by age or income and more by mindset** – intentionality, moderation, wellness, and control.



Brands need help **identifying, segmenting, and reaching audiences** shaped by lifestyle and health behaviors rather than traditional demographics.

Re-introducing Brands in a Moment of Change

As brands reformulate products, resize portions, or reposition around health and balance, they face a **re-education challenge**.



This moment requires **strong awareness and memorability** to ensure consumers understand what's changed, and why the brand still fits their lives.

Delivering Credible, Brand-Safe Health & Wellness Messaging

With GLP-1s pushing health, body awareness, and nutrition into the mainstream, **credibility matters** more than ever, especially as consumers scrutinize claims and look for reassurance over hype.



Brands must **show up in high-trust environments** with the right tone, talent, and context.

Proving Real Impact as Behaviors Evolve

GLP-1 growth is **changing how people eat, drink, shop, and dine**, often in subtle ways.



Brands need **measurement** that goes beyond impressions to understand shifts in orders, traffic, and loyalty, and to validate that marketing is driving **real behavioral outcomes**.



The Impact of GLP-1 Growth for **BEAUTY & PERSONAL CARE**

As GLP-1 adoption increases, BPC brands must evolve to meet consumer demand for structural skin health, clinically backed solutions, and nutraceutical supplements to support their wellness journey.

Category Trends

Consumption is pivoting from trend-led trial to high-efficacy, results-oriented self-care.

- Renewed social confidence fueling a surge in spend
- Routines evolving to support physiological change & LT health
- Growing preference for clinically proven solutions that protect transformation investments

35%

increase in beauty product purchasing among GLP-1 users compared to before their use.¹

Business Impact

Clinical BPC and performance supplement regimens are defining the new growth frontier.

- Rapid weight loss driving demand for corrective solutions
- Fast-tracking of innovations in elasticity, collagen, barrier repair
- Portfolios expanding into performance supplements

50%

of consumers would be interested in using supplements to help alleviate common side effects from using GLP-1 medications.²

Media & Marketing Implications

Shift from promoting "quick fixes" to empathetic, educational, and health-adjacent storytelling.

Brand Positioning

- Brands are positioning products as essential partners in the broader health journey vs. surface-level enhancements

Content Evolution

- Emphasis on long-form educational content surrounding wellness & talent/influencers

Audience & Contextual Targeting

- Shifting from traditional demos to utilize retailer signals and contextually relevant moments (e.g., transformations)



NBCU Category Solutions

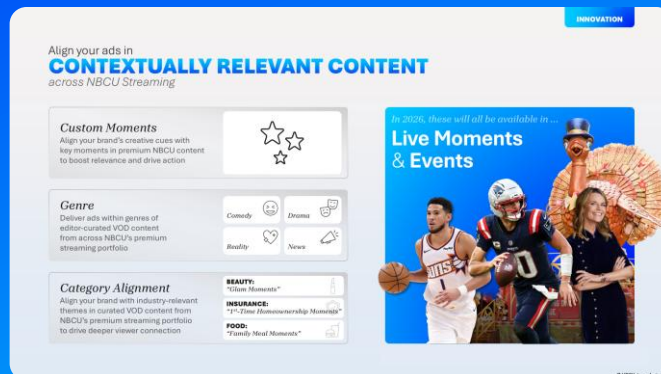
Leverage the power of NBCUniversal's content & audiences to **DRIVE IMPACT FOR BPC BRANDS IN THE GLP-1 ERA**

1P Audience Targeting via Retail Data Partnerships



Leverage Instacart 1P data to reach beauty & personal care shoppers (*e.g., hair care, vitamins & supplements, facial & skincare product buyers*) across NBCU's premium video content with full-funnel measurement.

AI-Powered Contextual Alignment Solutions



Leverage NBCU's AI-powered contextual alignment to match ad creative to high-impact healthy-living moments, such as '*skincare treatment/rejuvenation moments*' across the portfolio, reinforcing product relevance for GLP-1 users.

Drive Engagement via NBCU Social & Talent



Harness the scale and power of NBCU Social by partnering with trusted talent to foster community, educate consumers, and shift perceptions around beauty and personal care for GLP-1 users.



The Impact of GLP-1 Growth for **BEVERAGE**

As GLP-1 usage scales, beverage brands must adapt to more intentional consumption and a redefined consumer mindset.

Category Trends

Shift from routine consumption to mindful, experience-driven, and functional choices.

- More intentional beverage consumption
- Focus on functional or experiential benefit
- Pressure on full-sugar, high-calorie drinks while zero-sugar, functional, no-to-low alcohol options gain relevance

44%

of GLP-1 users drink less alcohol after starting medication, with majority of those maintaining these lower alcohol habits long term.¹

Business Impact

Declining volume is being offset by a focus on premium products and functional benefits.

- Shift toward value, mix, and portfolio flexibility
- Emphasis on premium and functional differentiation
- Expansion into zero-sugar, low/no-alcohol, functional options, and smaller formats

5x

increase in the number of new beverage product releases that have gut health claims since 2020.²

Media & Marketing Implications

Moderation mindsets demand media and messaging aligns with intentional consumption.

Audience Targeting

- Redefining audiences around healthier routines rather than traditional demographic segments

Creative Messaging

- Themes of moderation, function, and intentional choice resonate more

Contextual Relevance

- Alignment with wellness, fitness, productivity, and social connection to create connections and drive occasions



NBCU Category Solutions

Leverage the power of NBCUniversal's content & audiences to **DRIVE IMPACT FOR BEVERAGE BRANDS IN THE GLP-1 ERA**

1P Audience Targeting via Retail Data Partnerships

NBCUniversal

RETAIL MEDIA PARTNERSHIPS

Maximizing brands' retail investments with 1P shopper data and insights across NBCU's premium video content

Instacart Walmart Connect

The graphic features four images: a person using a smartphone, a woman looking at a phone, a man holding a phone, and a television screen displaying a show.

Leverage Instacart 1P data to reach health-centric food & beverage shoppers (e.g., *lactose-free, non-alc, low sugar product buyers*) across NBCU's premium video content with full-funnel measurement.

AI-Powered Contextual Alignment Solutions

Align your ads in
CONTEXTUALLY RELEVANT CONTENT
across NBCU Streaming

Custom Moments
Align your brand's creative cues with key moments in premium NBCU content to boost relevance and drive action

Genre
Deliver ads within genres of editor-curated VOD content from across NBCU's premium streaming portfolio

Category Alignment
Align your brand with identity-relevant themes in curated VOD content from NBCU's premium streaming portfolio to drive deeper viewer connection

Live Moments & Events
In 2025, these will all be available in...

BEAUTY:
"Cook Moments"

BEVERAGE:
"P-Zone Runnership Moments"

FOOD:
"Family Visual Moments"

The graphic includes icons for Comedy, Drama, Reality, and News, and a large image of a football player.

Leverage NBCU's AI-powered contextual alignment to match ad creative to high-impact moments, such as '*health-conscious dining and cooking & recipe moments*' across the portfolio, reinforcing product relevance for GLP-1 users.

Drive Engagement via NBCU Social & Talent

Brands of All-Sizes Connect with the Most Sought-After Shows and Films
Through Impactful **CONTENT PARTNERSHIPS**

In-Show Integrations
Appear front and center in show by exploring an organic, active or passive integration

Branded Content
Leverage the NBCU Portfolio to influence our passionate audience, whether it's your talent or ours, with content suitable for all platforms created by NBCUniversal

Show Segments
Align your brand with the most engaging, contextually relevant content experiences blending your brand with NBCU content

Media Sponsorship
Align with popular programming through a high-impact media sponsorship driving awareness, consideration, and conversion

Commerce
Bringing fans closer to the path to purchase through comic IP, talent, and storytelling

+Social, Event, and Podcast Opportunities

The graphic includes images of various NBCU shows and talent.

Harness the scale and power of NBCU Social by partnering with trusted talent to foster community, educate consumers, and shift perceptions around beauty and personal care for GLP-1 users.



The Impact of GLP-1 Growth for **CPG**

As GLP-1 households scale, CPG brands must remain relevant in a market that is eating less but demanding more from every bite.

Category Trends

The GLP-1 basket is a pivot from quantity and indulgence to nutrient-dense, functional quality.

- Reducing high-calorie snacks and sugary treats
- Growth in nutrient-dense staples like lean proteins, fresh produce, and high-fiber
- Early spend pullback shifting to new “maintenance-mode” shopping patterns

40–60%

Snack consumption among GLP-1 users has dropped by 40%–60% in early treatment phases.¹

Business Impact

Profitability is moving toward high-margin wellness innovation and value retail channels.

- Brands de-risking portfolios through GLP-1-friendly reformulations
- Smaller portion sizes supporting premium pricing amid lower intake
- Migration towards Club and eCommerce channels

35%

GLP-1 HHs are projected to represent 35% of all U.S. food & beverage units sold by 2030.²

Media & Marketing Implications

Brands are shifting from promoting indulgence to delivering empathetic, health-centric storytelling.

Audience Evolution

- Moving beyond classic demos to focus on a “wellness mindset”

Alternative Messaging

- Brand storytelling pivot from product-centric features to transformational narratives

Media Channels & Touchpoints

- Media spend shifting toward health-authority voices and wellness platforms to build credibility & trust



NBCU Category Solutions

Leverage the power of NBCUniversal's content & audiences to **DRIVE IMPACT FOR CPG BRANDS IN THE GLP-1 ERA**

1P Audience Targeting via Retail Data Partnerships

The screenshot shows the NBCUniversal Retail Media Partnerships interface. It features the NBCUniversal logo at the top. Below it, the text "RETAIL MEDIA PARTNERSHIPS" is prominently displayed. Underneath, a smaller line of text reads: "Maximizing brands' retail investments with 1P shopper data and insights across NBCU's premium video content." At the bottom, there are two buttons: "Instacart" and "Walmart Connect". To the right of the text, there are four small images: a person using a smartphone, a woman looking at a phone, a man looking at a phone, and a television screen displaying a program.

Leverage Instacart 1P data to reach health-centric household shoppers (*e.g., health-conscious, high protein, and low-fat product buyers*) across NBCU's premium video content with full-funnel measurement.

AI-Powered Contextual Alignment Solutions

The screenshot shows the AI-Powered Contextual Alignment Solutions interface. It features the text "Align your ads in CONTEXTUALLY RELEVANT CONTENT across NBCU Streaming". Below this, there are three main sections: "Custom Moments" (with a star icon), "Genre" (with icons for Comedy, Drama, Reality, and News), and "Category Alignment" (with icons for Beauty, Insurance, and Food). To the right of these sections, there is a large image of a person in a costume, with the text "Live Moments & Events" and "In 2025, these will all be available in...".

Leverage NBCU's AI-powered contextual alignment to match ad creative to high-impact healthy-living moments, such as *'cooking & recipe moments'* across the portfolio, reinforcing product relevance for GLP-1 users.

Drive Engagement via NBCU Social & Talent

The screenshot shows the Drive Engagement via NBCU Social & Talent interface. It features the text "Brands of All-Sizes Connect with the Most Sought-After Shows and Films Through Impactful CONTENT PARTNERSHIPS". Below this, there are five main sections: "In-Show Integrations", "Branded Content", "Show Segments", "Media Sponsorship", and "Commerce". Each section has a small image and a brief description. At the bottom, there is a section titled "Social, Event, and Podcast Opportunities".

Build authentic connection through content partnerships within NBCU's health-focused programming, to create or align with content that educates consumers metabolic health and muscle maintenance.



The Impact of GLP-1 Growth for **RESTAURANTS**

As GLP-1 adoption reshapes dining preferences, Restaurant brands must focus on menu innovation and occasion-driven dining to drive business resilience.

Category Trends

How often consumers dine out and what they eat when they do is evolving.

- Dining out less, with visits more intentional & occasion-driven
- Rising demand for smaller portions, shareables, and snack-sized items
- Greater focus on fiber, protein, and nutrient-dense choices

35%

of diners report ordering smaller portion sizes for health-related reasons, while over 55% are ordering more vegetables & fruit options.¹

Business Impact

Profitability is increasingly tied to menu flexibility and occasion-driven demand.

- Expected traffic and sales declines
- Ongoing menu adjustments (portions, snacks, protein, fiber, alc. alternatives) to meet demand and stabilize profitability
- Competition with grocery for everyday meals

47%

of former GLP-1 users report continuing to cook more meals at home even after discontinuing the medication.²

Media & Marketing Implications

Reinforce loyalty by speaking to both health- and non-health-focused audiences.

Creative Messaging

- Highlighting menu flexibility and health-aligned options

Audience Targeting

- Shifting to existing and future loyalists to attract and retain high-value guests

Contextual Alignment

- Alignment with group dining and shared moments to drive occasion-based & social dining



NBCU Category Solutions

Leverage the power of NBCUniversal's content & audiences to **DRIVE IMPACT FOR RESTAURANTS IN THE GLP-1 ERA**

Storytelling & Custom Content

Brands of All-Sizes Connect with the Most Sought-After Shows and Films Through Impactful **CONTENT PARTNERSHIPS**

In-Show Integrations

Appear front and center in show by exploring an organic, active or passive integration

Branded Content

Leverage the NBCU Portfolio to influence our passionate audience, whether it's your talent or ours, with content suitable for all platforms created by NBCUniversal

Show Segments

Align your brand with the most content awareness, blending your brand with NBCU content

Media Sponsorship

Align with popular programming through a high-impact media sponsorship driving awareness, consideration, and conversion

Commerce

Bringing fans closer to the path to purchase through iconic IP, talent, and storytelling

+Social, Event, and Podcast Opportunities

Partner with NBCU talent & IP to showcase how GLP-1 users and health-conscious audiences can still dine out. e.g., “This is what I order on GLP-1s so I can still eat out while also hitting my health goals.”

AI-Powered Contextual Alignment Solutions

Align your ads in **CONTEXTUALLY RELEVANT CONTENT** across NBCU Streaming

Custom Moments

Align your brand's creative cues with key moments in premium NBCU content to boost relevance and drive action

Genre

Deliver ads within genres of editor-curated VOD content from across NBCU's premium streaming portfolio

Category Alignment

Align your brand with industry-relevant themes in curated VOD content from NBCU's premium streaming portfolio to drive deeper viewer connection

Live Moments & Events

In 2025, these will all be available in ...

Leverage NBCU's AI-contextual alignment to match ad creative with high-impact moments, such as *'cooking & recipe moments, dining out moments'* across the portfolio, reinforcing product relevance for GLP-1 users

Audience Targeting to Reach Relevant Consumers



Use 1P and trusted 3P data from partners like Circana and NCS to reach health-conscious diners, fitness enthusiasts, loyalty members, and other relevant audiences to connect product messaging with potential GLP-1 users and increase visit frequency.



The Impact of GLP-1 Growth for **RETAIL**

Widespread GLP-1 usage is accelerating size volatility, prompting Retailers to prioritize value, flexibility, and strategies that protect margins while resonating with consumers navigating physical changes.

Category Trends

Apparel shopping may shift towards value and flexibility.

- Trading down to lower-price and lower-commitment purchases vs. premium “for life” items
- Accessories resilient due to less dependency on sizing
- Increased social activity fueling confidence-driven spending

3pp

increase in sales of women’s bottoms below size 26 between 2022 & 2024. Sales of XS and S women’s tops rose 2 percentage points.¹

Business Impact

Increased complexity across inventory planning, margins, and subcategory mix.

- Pressured margins from increased small size demand, fit uncertainty and return rates
- Resilience in resale, secondhand, athleisure, fast-fashion, and low-cost e-comm due to size flexibility & lower price/commitment

Up to \$5B

in excess inventory and related costs is at risk for apparel companies that fail to adjust merchandising strategies in response to GLP-1-driven trends.¹

Media & Marketing Implications

Prioritization of health-focused, value-conscious, and transitional shopping audiences.

Creative Messaging

- Highlighting value, flexibility, confidence, and fit

Audience Targeting

- Prioritizing health- and wellness-focused audiences and transitional shoppers

Contextual Alignment

- Alignment with shopping and health-focused moments to highlight products and services that directly support GLP-1 users



NBCU Category Solutions

Leverage the power of NBCUniversal's content & audiences to **DRIVE IMPACT FOR RETAIL BRANDS IN THE GLP-1 ERA**

Storytelling & Custom Content

Brands of All-Sizes Connect with the Most Sought-After Shows and Films Through Impactful **CONTENT PARTNERSHIPS**

In-Show Integrations

Appear front and center in show by exploring an organic, active or passive integration

Branded Content

Leverage the NBCU Portfolio to influence our passionate audience, whether it's your talent or ours, with content suitable for all platforms created by NBCUniversal

Show Segments

Align your brand with the most content-segmented relevant content seamlessly blending your brand with NBCU content

Media Sponsorship

Align with popular programming through a high-impact media sponsorship driving awareness, consideration, and conversion

Commerce

Bringing fans closer to the path to purchase through iconic IP, talent, and storytelling

+Social, Event, and Podcast Opportunities

Partner with NBCU talent that uses GLP-1s (e.g., Andy Cohen, Kelly Clarkson) to showcase how they shop and how retail partners can help support & uplift users during these transitions.

AI-Powered Contextual Alignment Solutions

Align your ads in **CONTEXTUALLY RELEVANT CONTENT** across NBCU Streaming

Custom Moments

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Genre

Deliver ads within genres of editor-curated VOD content from across NBCU's premium streaming portfolio

Category Alignment

Align your brand with industry-relevant themes in curated VOD content from NBCU's premium streaming portfolio to drive deeper viewer connection

Live Moments & Events

In 2025, these will all be available in...

Lean into shopping and health-focused moments to highlight products and services supporting GLP-1 users. Use NBCU's AI-contextual solution to align ad creative with high-impact moments, such as *'online shopping, fitness/exercise purchase moments'*.

Audience Targeting to Reach Relevant Consumers



Leverage 1P and trusted 3P data from partners like Circana and NCS to reach health-focused consumers, fitness enthusiasts, resale shoppers and other relevant audiences to deliver product messaging and connect with potential GLP-1 users.



THANK YOU!

For questions, please reach out to:

Pharma: Megan Ryan, Nikita Tolani

CPG, BPC, Beverage: Dominique Folacci, Nick Cafiero, Ben Cohen

Retail & Restaurants: Adam Daniele, Cynthia Jung, Andrea Illan

