

# Ozempic/GLP-1 Consumer Tracker

POWERED BY CIVICSCIENCE DATA

November 2023

This report is confidential and CivicScience does not authorize the use of this content in part or in whole for outside use. It is not to be published without written consent from CivicScience.



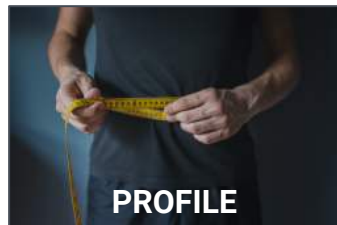
# Contents

---

Ozempic and GLP-1 Usage	<a href="#">04</a>
Segment Profiles	<a href="#">06</a>
Behavioral Profiles	<a href="#">10</a>
Psychographic Profiles and Driver Analysis	<a href="#">16</a>
Food Behaviors	<a href="#">24</a>
Retail Behaviors	<a href="#">29</a>
Healthcare Behaviors	<a href="#">33</a>
General Lifestyle	<a href="#">36</a>
Appendix	<a href="#">39</a>

# WHAT WE'RE SEEING:

## Ozempic and GLP-1 Current Users



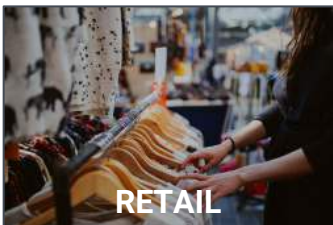
**PROFILE**

- Younger— more likely to be Gen Z (18-24) or a Millennial (25-44)
- Diverse— more likely to be Black or Hispanic
- Higher income— estimated annual household income about \$4K per year higher than average
- City-dwellers— more likely to report living in an urban area, less likely to report living in a rural area
- Less educational attainment— less likely to have a college degree, but more likely to report currently being employed



**FOOD**

- Frequent restaurant diners— less likely to make dinner at home, more likely to eat out at all restaurant types
- Less likely to be healthy eaters— more likely to say they don't have the time or money to eat more healthily
- Heavy snackers— more likely to eat salty, sweet, and healthy snacks daily
- Prefer different snacks— less likely to report eating chicken and potato chips, more likely to report eating other candy, meat snacks, and popcorn



**RETAIL**

- Cutting back on some purchases due to higher prices— including home improvement, personal care items, and groceries
- But not others— such as dining out and streaming services/subscriptions
- Different spending plans— expect increased spending over the next month on cars, clothing, and restaurants, but much less likely to expect increased spending on groceries
- Shopping more often— shopping both in-store and online more than usual for this time of year



**HEALTHCARE**

- Report higher rates of obesity in household— slightly less likely to consider themselves healthy, and much more likely to say they or another household member manages obesity
- Tired cosmetic surgery— nearly three times as likely to have had elective surgery for cosmetic or weight-loss purposes
- More likely to be insured through the ACA/Health Insurance Marketplace— less likely to be insured through employer or retirement plan



**LIFESTYLE**

- Frequent gym-goers— more likely to exercise at a gym and own or have access to exercise/fitness equipment, but less likely to exercise (in a gym or at home) on a consistent basis (several times a week)
- Sleep a bit less— report going to bed and waking up somewhat earlier than average on weekdays and getting slightly fewer hours of sleep per night overall
- Score lower on the Emotional Well-being Index— report similar levels of happiness and stress, but much more likely to report recent strong feelings of fear, sadness, excitement, and worry

# Ozempic and GLP-1 Usage

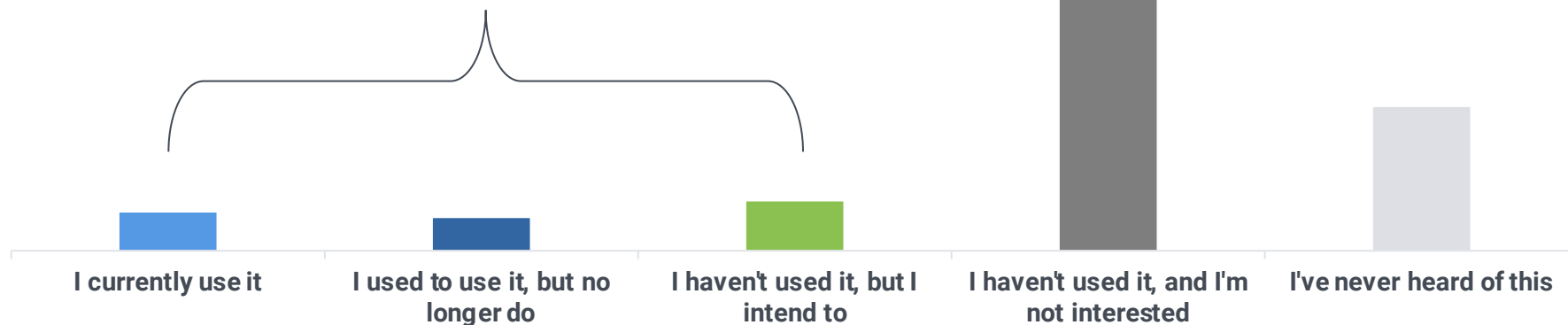


# X percent of respondents currently take Ozempic or another GLP-1 medication, and an additional X percent intend to do so.

**Q: Which of the following best describes your experience with Ozempic or another similar (GLP-1) medication prescribed for weight loss?**

This data will be tracked and trended over time.

XX% of U.S. adults are either currently using or considering taking a GLP-1 drug for weight loss purposes.



US Adults: 68,000+ responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Segment Profiles: Ozempic and GLP-1 Current Users and Intenders



# Ozempic/GLP-1 users and intenders are younger and more diverse than the general population.

	Ozempic/GLP-1 Current Users	Ozempic/GLP-1 Intenders	Gen Pop
Male			
Female			
18-34			
35-54			
55+			
Low Income			
Middle Income			
High Income			
High school or less			
Some college, no degree			
Bachelor's or associate degree			
Graduate or professional degree			

	Ozempic/GLP-1 Current Users	Ozempic/GLP-1 Intenders	Gen Pop
White or Caucasian			
Hispanic or Latino			
Black			
Other			
Asian or Pacific Islander			
City			
Suburbs			
Rural Area			
Other			
Parent			
Married			
Single, never married			

A **red** number indicates an index lower than 90, and a **green** number indicates an index higher than 110, compared to the Gen Pop.

# Ozempic/GLP-1 Current Users: Segment Profile

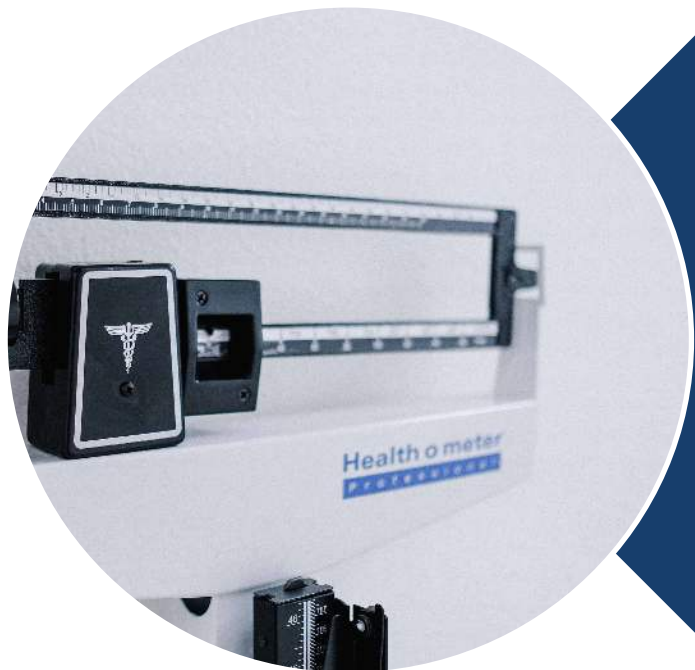


Compared to the average U.S. adult, GLP-1 current users are more likely to be...

- Gen Z adults (11%) vs Millennials (7%)
- Higher income (average +\$4k annual HH)
- City dwellers (14%)
- New product adopters (11%)
- Influenced product purchased by social media – general (12%), electronics (11%), food (11%), clothing/accessories (11%)
- Amazon Prime members (11%)
- Added to digital devices (11%)
- Daily video game players (11%)
- Active on social media – daily users of Tumblr (11%), R / Twitter (11%), TikTok (11%)



# Ozempic/GLP-1 Intenders: Segment Profile



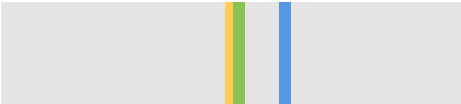
Compared to the average U.S. adult, GLP-1 current users are more likely to be...

- Gen Z adults (14%) vs Millennials (7%)
- Higher income (average 104k annual HH)
- City dwellers (14%)
- New product adopters (17%)
- Influenced (product purchased by social media) – general (12%), electronics (17%), food (17%), clothing/accessories (17%)
- Active Prime members (17%)
- Added to digital devices (17%)
- Daily video game players (17%)
- Active on social media – daily users of Tumblr (17%), R / Twitter (17%), TikTok (17%)

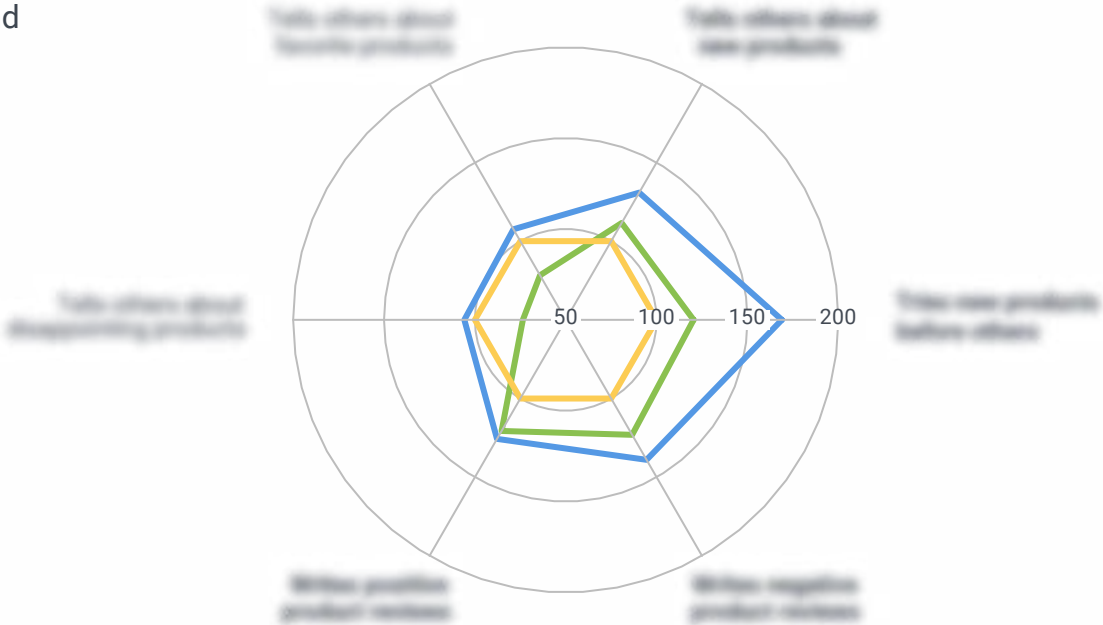
# Behavioral Profiles: Ozempic and GLP-1 Current Users and Intenders

# Findings

The Market Maven index aims to identify how segments adopt new products and brands and share their opinions with others.



Ozempic Current User  
 Ozempic Intender  
 Gen Pop



# Findings

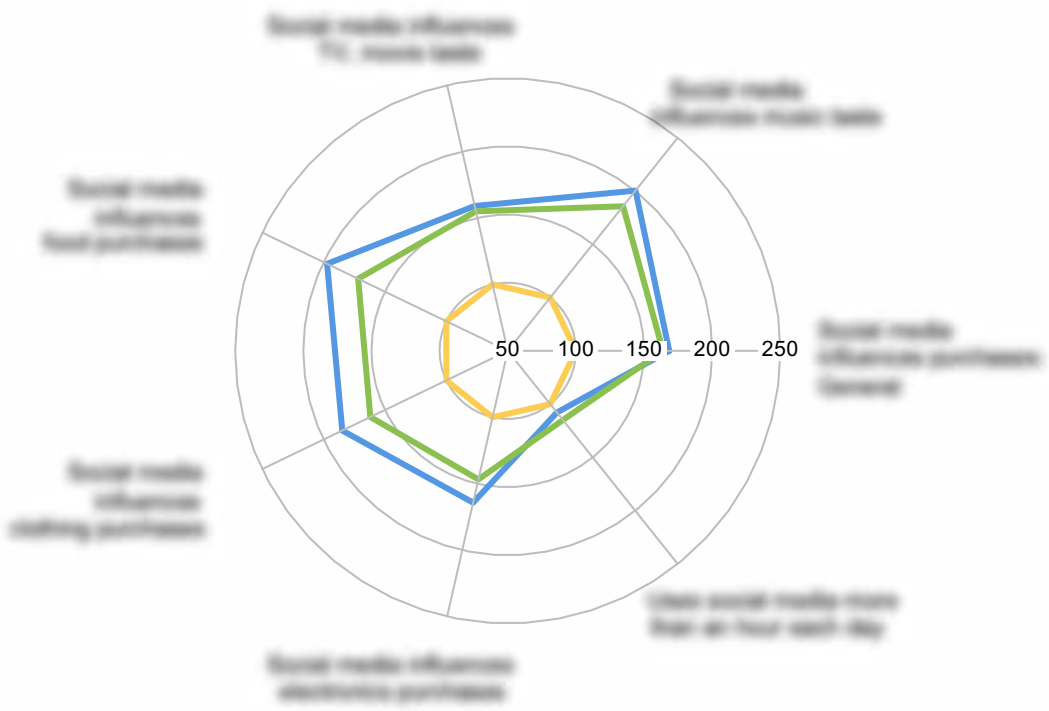
The Social Media Influence Index aims to identify social media's impact on respondents' preferences and behavior.



Ozempic Current User

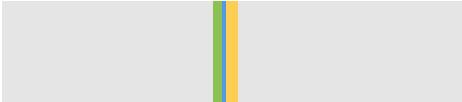
Ozempic Intender

Gen Pop

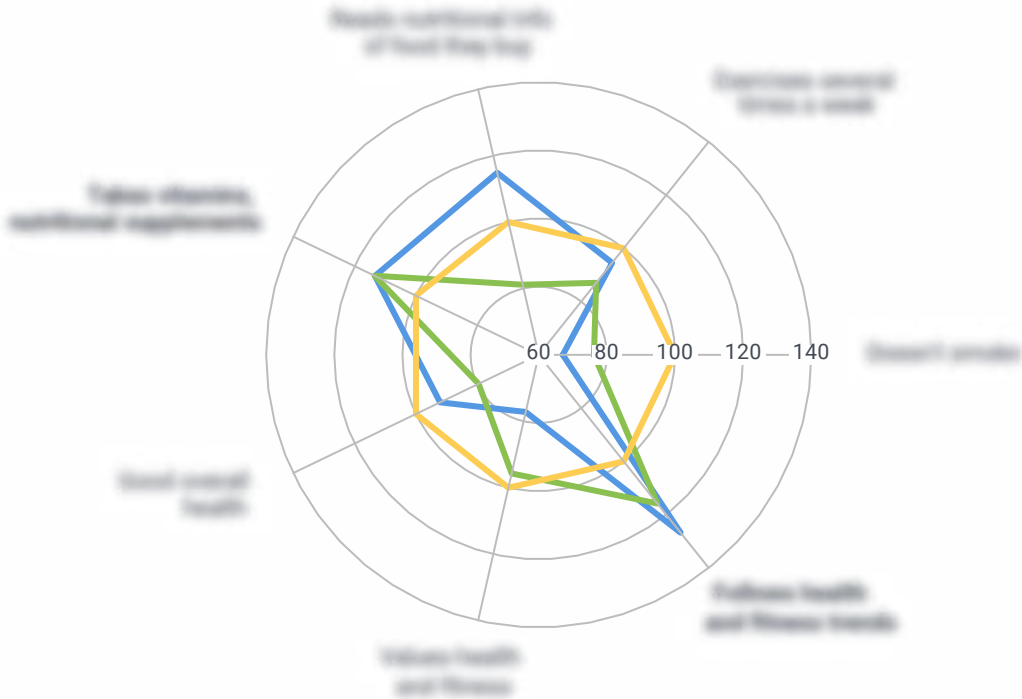


# Findings

The Health & Wellness index aims to identify how segments monitor and maintain their health and well-being.



Ozempic Current User  
 Ozempic Intender  
 Gen Pop

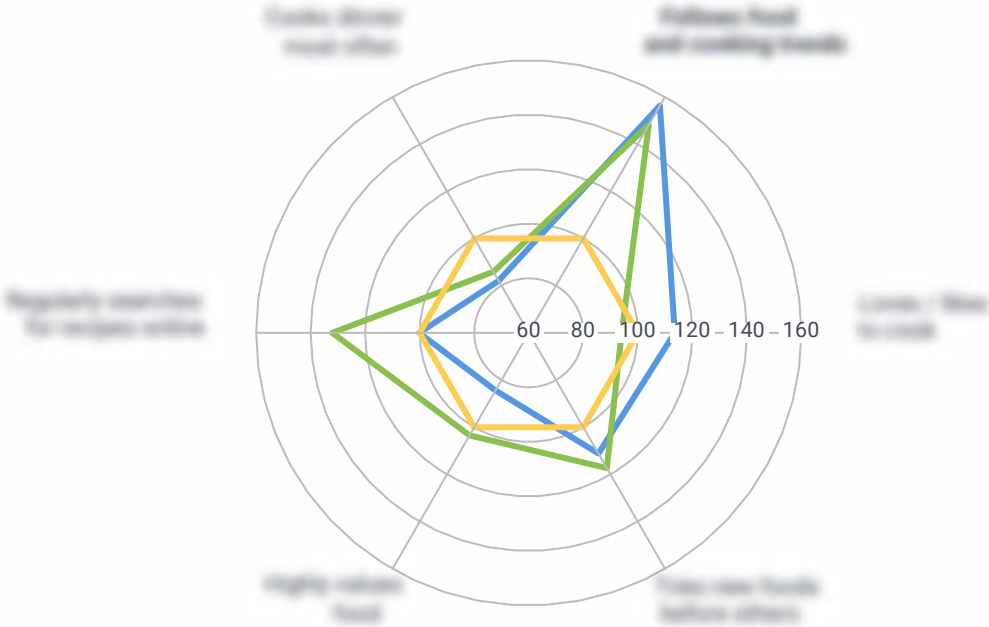


# Findings

The Food & Cooking index aims to identify how passionate segments are about food and how often they cook.



Ozempic Current User  
Ozempic Intender  
Gen Pop

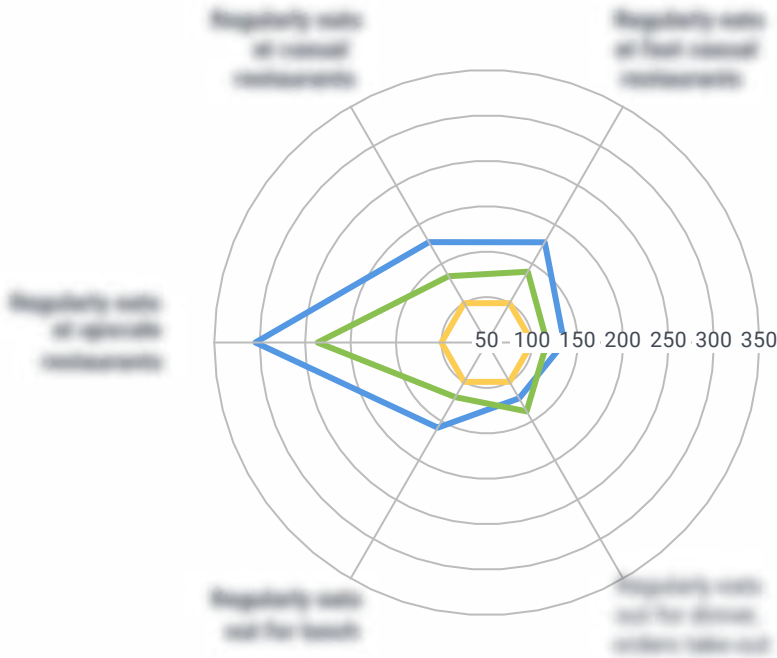


# Findings

The Dining Out index aims to identify how often segments eat meals outside of their home and at what types of restaurants.



Ozempic Current User  
Ozempic Intender  
Gen Pop



# Psychographic Profiles: Ozempic and GLP-1 Current Users and Intenders



# Findings

**Openness to Experience**

**Imaginative, innovative, creative, curious**

**Conscientiousness**

**Hard-working, dependable, well-organized, planners**

**Extroversion**

**Sociable, talkative, active, affectionate, optimistic**

**Agreeable**

**Collaborative, friendly, good-natured, generous**

**Neuroticism**

**Worried, temperamental, self-conscious, emotional**

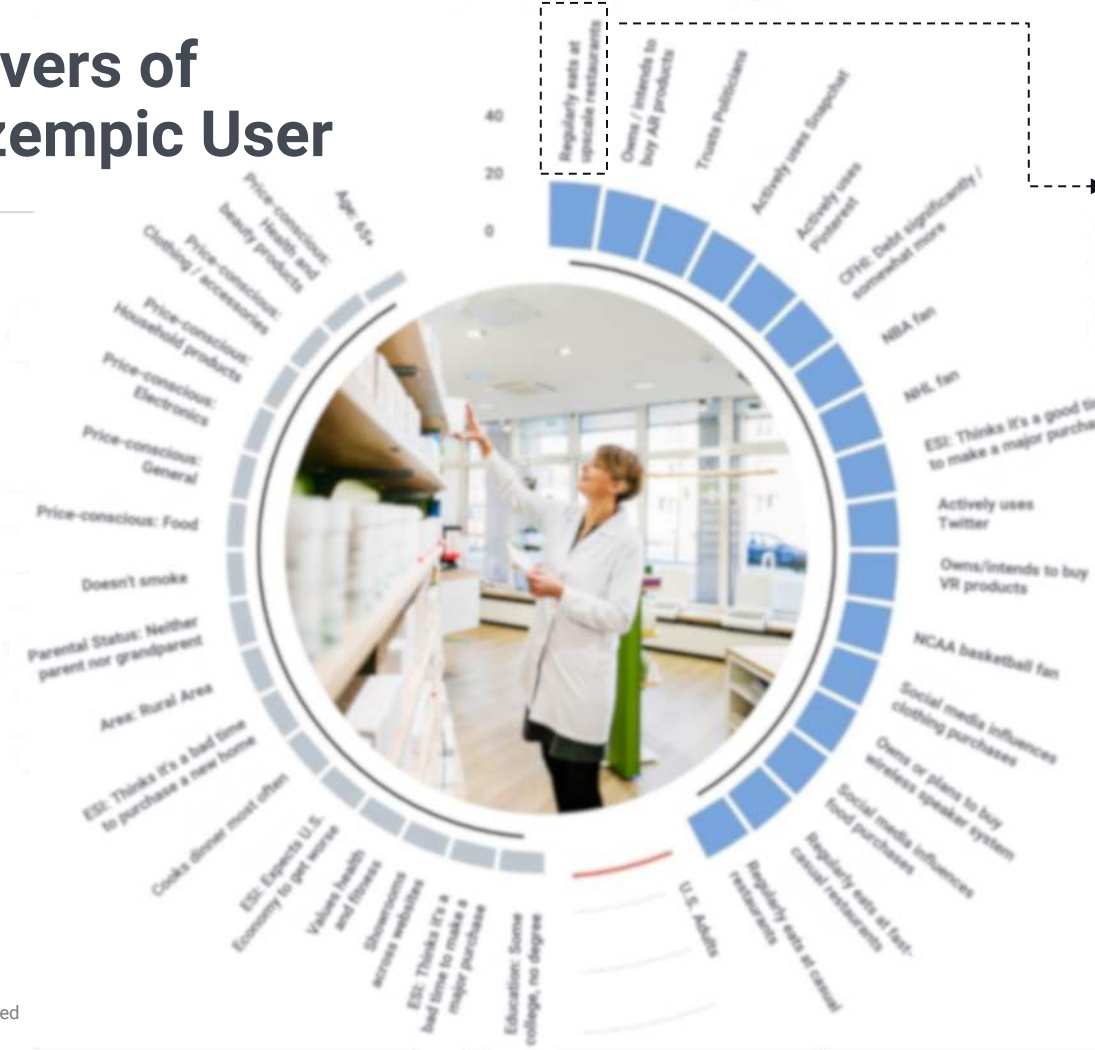
	Gen Pop	Ozempic/GLP-1 Current Users	Compared to Gen Pop
Openness to Experience			
Conscientiousness			
Extroversion			
Agreeableness			
Neuroticism			

*Since the 1980s, there's been an enormous amount of research in the field of psychology supporting the idea that every individual's personality can be described in terms of five fundamental traits: Openness to experience, Conscientiousness, Extroversion, Agreeableness, and Neuroticism*

US Adults: 458,819- 462,009 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
 Ozempic and GLP-1 Current Users: 3091-3102 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# The Top Drivers of Being an Ozempic User

Drivers of Under-Indexing



Consumers who regularly eat at upscale restaurants are far more likely than average to be users of Ozempic and other GLP-1 medications (+14pp).

Drivers of Over-Indexing

# The Top Drivers of Being an Ozempic User

The table below shows the consumer attributes that are drivers of **over-indexing** on being an Ozempic user.

Drivers of Over-indexing	Relative Index
Regularly use at least one specialty	115%
Have a specialty in top 10 products	115%
Take medicine	115%
Regularly use specialty	115%
Regularly use specialty	115%
Only take significantly associated with	115%
Not in	115%
Not in	115%
Not in. Think it's a good time to make a major purchase	115%
Regularly use specialty	115%
Have a specialty in top 10 products	115%
What associated with	115%
Have made reference calling purchase	115%
Have a specialty in top specialty product group	115%
Have made reference last purchase	115%
Regularly use at least one specialty	115%
Regularly use at least one specialty	115%

The table below shows the consumer attributes that are drivers of **under-indexing** on being an Ozempic user.

Drivers of Under-indexing	Relative Index
Age 50+	85%
Price sensitive. Health and beauty products	85%
Price sensitive. Clothing, accessories	85%
Price sensitive. Household products	85%
Price sensitive. Electronics	85%
Price sensitive. Travel	85%
Price sensitive. Food	85%
Doesn't smoke	85%
Personal status. Neither parent nor grandparent	85%
Not Black male	85%
Not in. Think it's a good time to purchase a new home	85%
Under 30 years old	85%
Not Hispanic/L.A. Born/raised in US	85%
Never health and fitness	85%
Doesn't smoke	85%
Not in. Think it's a good time to make a major purchase	85%
Education. Some college or higher	85%

# Top Metrics in the CivicScience Library on which Ozempic Users *Over-Indexed* During the Month of October

Question	Answer	U.S. Adults	Ozempic Users (N=1,000)	Index
Which of the following types of apps? (Choose all that apply)	Travel/Travel Management app	3.0%	27.0%	157.0%
Which of the following fitness subscription services do you currently use? (Select all that apply)	Udacity	3.0%	26.0%	153.0%
How often do you purchase these items for your pet? (Select all that apply)	Once a month or more	3.0%	27.0%	156.0%
What describes your usage of each of the following credit cards? (Choose three you're interested)	No credit card	3.0%	26.0%	153.0%
What describes your usage of each of the following credit cards? (Choose three you're interested)	No credit card	3.0%	27.0%	156.0%
Which of the following describes your experience with each online marketplace? (Select all that apply)	Used within past year	4.0%	26.0%	155.0%
Which of the following fitness subscription services do you currently use? (Select all that apply)	No fitness	3.0%	26.0%	153.0%
Which of the following best describes how frequently you drink carbon coffee or have one in the store?	Only	4.0%	26.0%	155.0%
Which of the following fitness subscription services do you currently use? (Select all that apply)	Udacity	3.0%	26.0%	153.0%
Which of the following fitness subscription services do you currently use? (Select all that apply)	Apple Fitness	4.0%	26.0%	157.0%

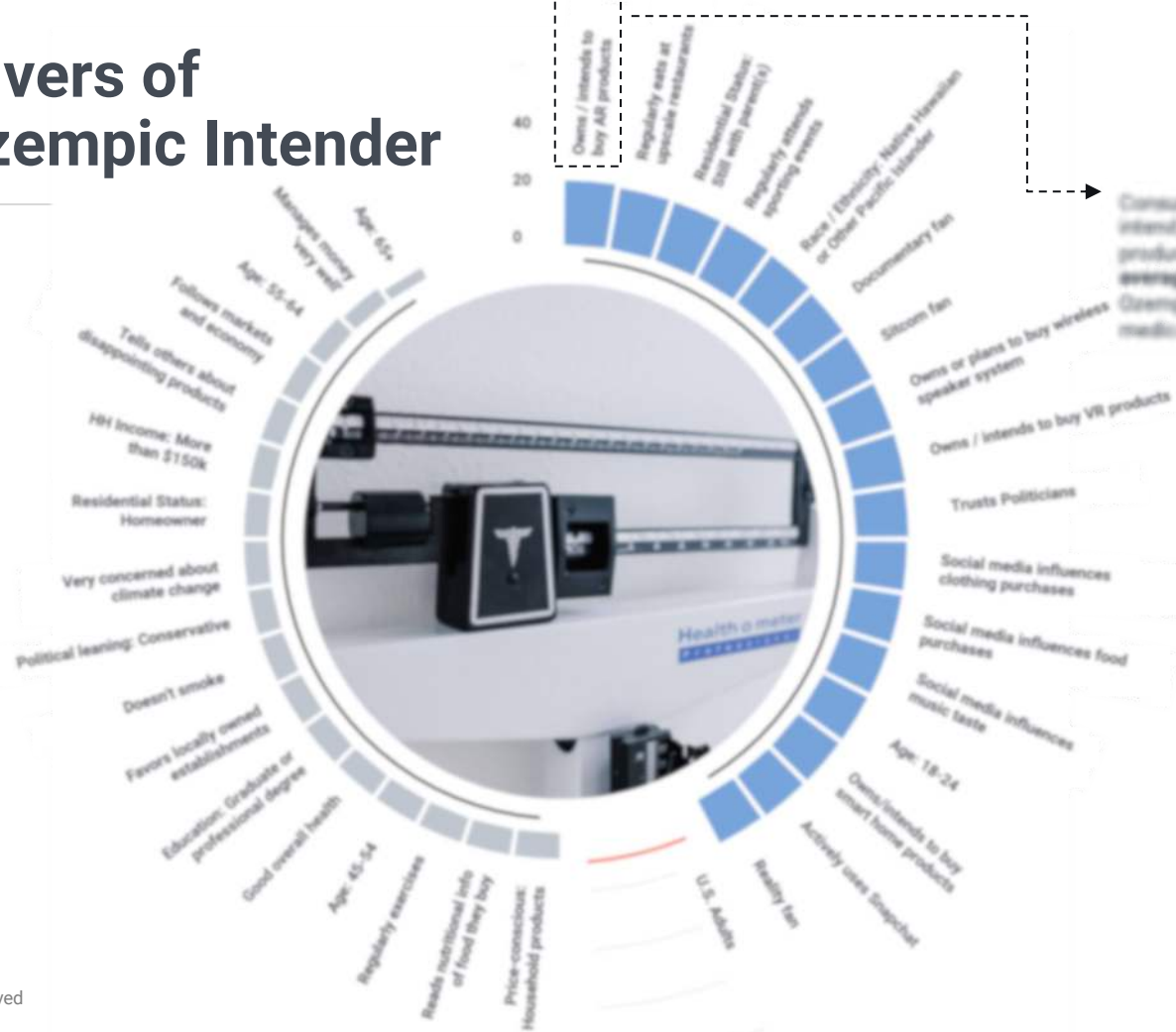
# Top Metrics in the CivicScience Library on which Ozempic Users *Under-Indexed* During the Month of October

Question	Answer	U.S. Adults	Ozempic Users (N=1,000)	Index
How much do you like Monday?	I don't like it	6.1%	6.0%	98.0
Which level of AI awareness do you typically use?	Do not use - I have information on AI but do not use it	1.0%	0.0%	100.0
Do you plan to shop over the Thanksgiving holiday weekend?	Yes on Saturday	6.1%	6.0%	98.0
How much time have you spent on athletic apparel in the last 12 months?	\$201-\$500	6.2%	6.0%	96.8
How much time have you spent on athletic footwear in the last 12 months?	\$201-\$500	6.2%	6.0%	96.8
How much do you like Facebook (social)?	I don't like it	10.0%	6.0%	60.0
How much do you like Threads?	I don't like it	1.1%	1.0%	90.9
Are you currently a student?	No	6.2%	1.0%	16.1
Over the next five years, do you expect advances in artificial intelligence (AI) to have a more positive or negative impact on your overall quality of life?	Overwhelmingly negative	22.0%	6.0%	27.3
How much time have you spent on sports equipment that includes registration fees, apparel, or footwear for your children, under 18, in the last 12 months?	\$1-\$50	6.0%	1.0%	16.7

# The Top Drivers of Being an Ozempic Intender

Drivers of Under-Indexing

Drivers of Over-Indexing



Consumers who say they own or intend to buy augmented reality products are far more likely than average to say they intend to try Ozempic or other GLP-1 medications (+12pp)

# The Top Drivers of Being an Ozempic Intender

The table below shows the consumer attributes that are drivers of *over-indexing* on being an Ozempic intender.

Drivers of Over-indexing	Relative Index Score
Know, intend to buy, or use Ozempic	112.8
Readily use a variety of products	112.8
Residential Status: 200+ sq ft	112.7
Readily attend sporting events	112.6
Know, already, before hearing a sales pitch, would use Ozempic	112.5
Income: \$100k+	112.5
Black (or)	112.5
Know or intend to buy another weight loss product	112.5
Know, intend to buy, or use Ozempic	112.5
Track fitness	112.5
Know media influence: eating and fitness	112.5
Know media influence: food and fitness	112.5
Know media influence: social media	112.5
Age: 18-29	112.5
Know, intend to buy, or use other health products	112.5
Actively use Instagram	112.5
White (or)	112.5

The table below shows the consumer attributes that are drivers of *under-indexing* on being an Ozempic intender.

Drivers of Under-indexing	Relative Index Score
Age: 30+	102.2
Manage money: into debt	102.2
Age: 30-39	102.2
Follow politics and economy	102.2
Talks others about shopping products	102.1
At Income: More than 2,000	102.1
Residential Status: Homeowner	102.1
Not concerned about climate change	102.1
Follow hearing: Conservative	102.1
Don't smoke	102.1
Know locally owned establishments	102.1
Obesity: Excludes in professional regimen	102.1
Good overall health	102.1
Age: 40-49	102.1
Readily exercise	102.1
Know nutritional info of food they buy	102.1
Freezer: consumes: frozen food products	102.1

# Food Behaviors





# Findings

## Dining Out

	U.S. Adults	Ozempic and GLP-1 current users	Index
Usually cooks dinner at home			
Restaurant Frequency Score: fast food			
Restaurant Frequency Score: fast casual			
Restaurant Frequency Score: casual			
Restaurant Frequency Score: upscale			

US Adults: 27,046-29,002 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 2,807-2,844 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Findings

## Healthy Eating

	U.S. Adults	Ozempic and GLP-1 current users	Index
Consider themselves to be healthy eaters			
Reason for not eating healthier: Lack of time / money			
Reason for not eating healthier: Prefer less healthy foods			
Drink at least 1-2 alcoholic beverages per week			
Drinking soda less often now than five years ago			

US Adults: 20,893-36,224 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 877-2,577 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Findings

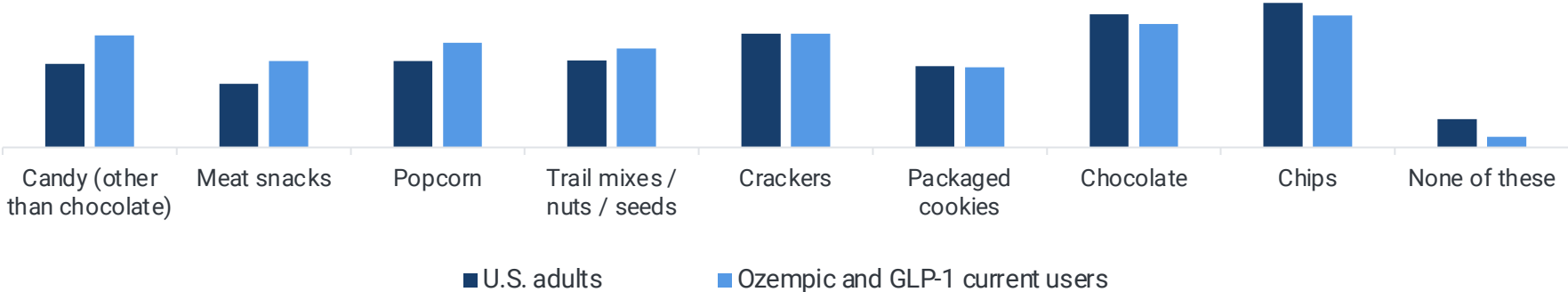
## Snacking

	U.S. Adults	Ozempic and GLP-1 current users	Index
Eat salty snacks daily (chips, popcorn, etc.)			
Eat sweet snacks daily (candy, cookies, etc.)			
Eat healthy snacks daily (fruit, nuts, etc.)			

US Adults: 4,786 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 340 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Findings

**Q: In the past week or so, which of the following types of snacks have you eaten?  
Select all that apply.**



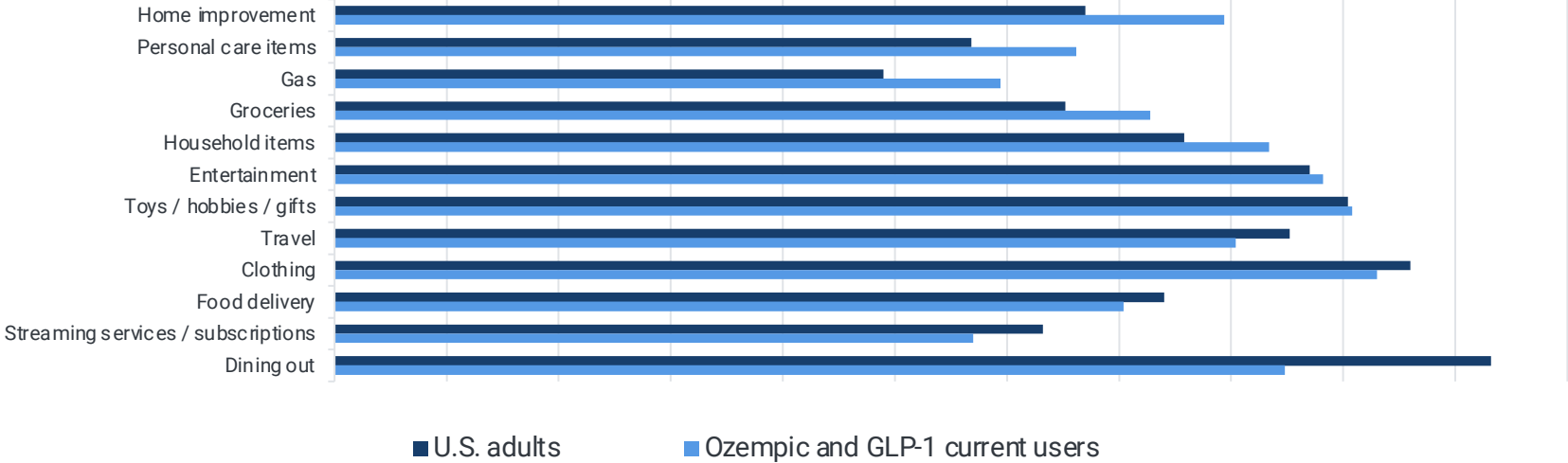
US Adults: 4,888 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 353 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Retail Behaviors



# Findings

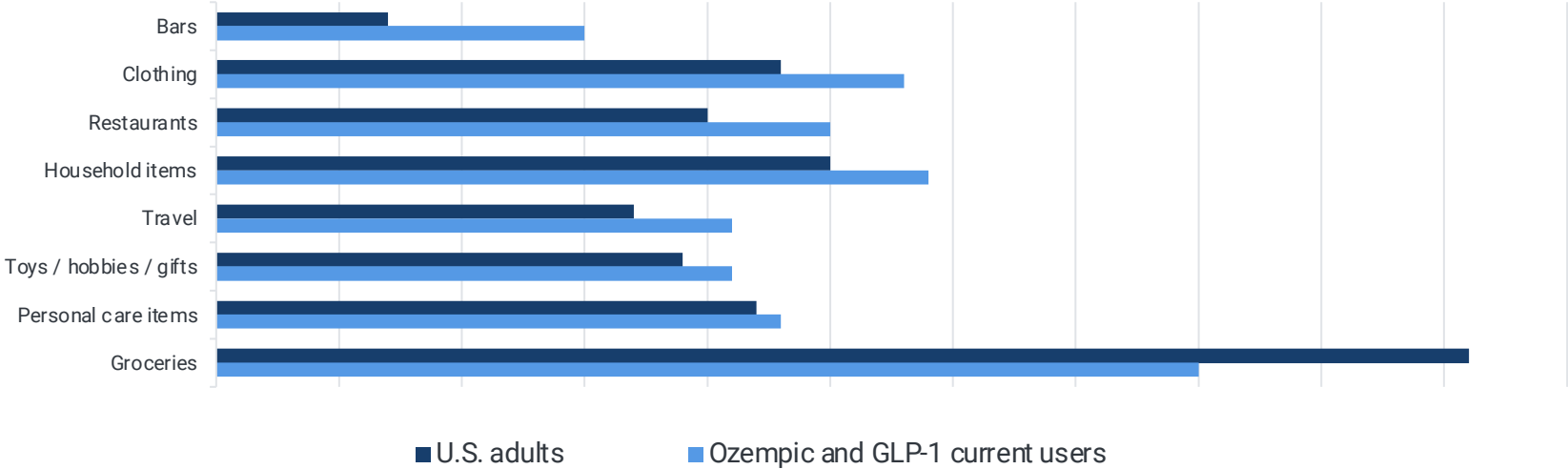
**Q: Which, if any, of the following categories have you reduced spending / anticipate cutting spending on due to general rising prices? (Select all that apply.)**



US Adults: 7,604-7,777 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 1,354-1,363 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Findings

**Q: Which of the following categories do you think you will spend more on in the next month compared to this past month? (Please select all that apply.)**



US Adults: 27,028 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 2,790 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Findings

## In-store vs. Online Shopping

	U.S. Adults	Ozempic and GLP-1 current users
Shopping in stores more or less than usual ( <b>Net More Score</b> )		
Shopping online more or less than usual ( <b>Net More Score</b> )		

US Adults: 23,471-24,313 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 2,729-2,775 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Net more score = % of respondents who report doing more shopping than usual minus % who report doing less



# Healthcare Behaviors



# Findings

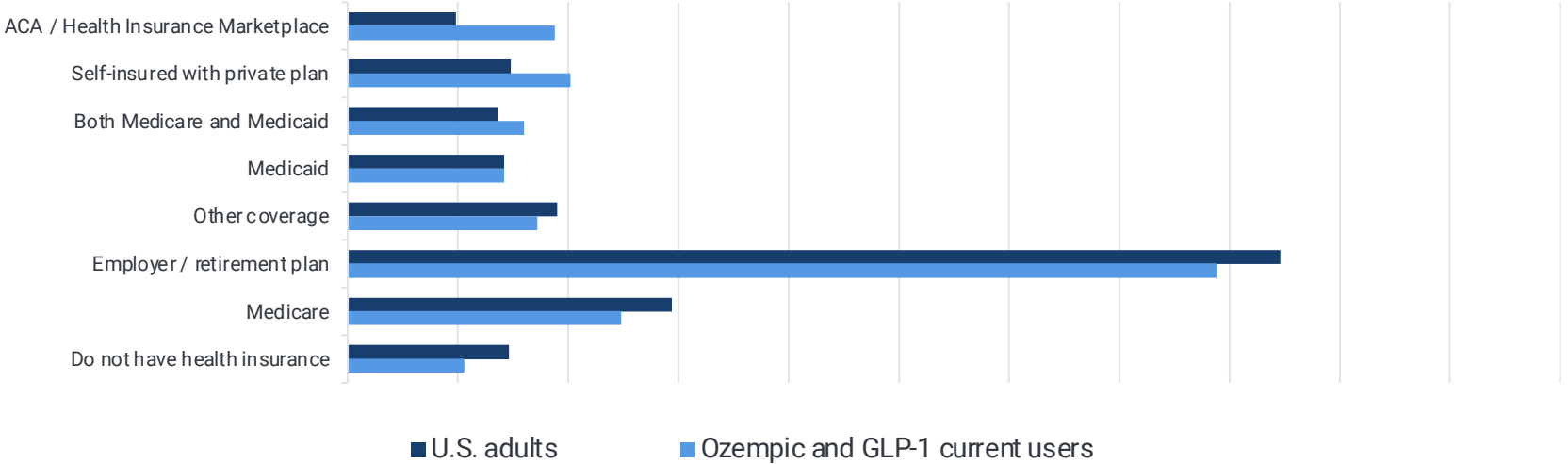
## Health Concerns and Cosmetic Surgery

	U.S. Adults	Ozempic and GLP-1 current users	Index
Consider themselves healthy			
Average number of doctor visits in past 12 months			
Self or other household member currently managing obesity			
Have had elective cosmetic / weight-loss surgery			
Interested in having cosmetic / weight-loss surgery			

US Adults: 8,362-27,859 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 1,918-2,771 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Findings

**Q: Which of the following categories do you think you will spend more on in the next month compared to this past month? (Please select all that apply.)**



US Adults: 27,859 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 2,771 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# General Lifestyle



# Findings

## Exercise and Sleep

	U.S. Adults	Ozempic and GLP-1 current users	Index
Exercise at a gym (several times a month or more)			
Have access to home exercise / fitness equipment			
Average weekday wakeup time			
Average weekday bedtime			
Average hours of sleep per night (including weekends)			

US Adults: 7,584-27,906 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 2,254-2,782 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Findings

## Emotional Well-being

	U.S. Adults	Ozempic and GLP-1 current users	Index
Emotional Wellbeing Index			
Felt ____ strongly in past week or so: sad			
Felt ____ strongly in past week or so: happy			
Felt ____ strongly in past week or so: stressed			
Felt ____ strongly in past week or so: worried			
Felt ____ strongly in past week or so: afraid			
Felt ____ strongly in past week or so: excited			

US Adults: 24,773 responses weighted by US Adults from 10/1/2023 to 10/31/2023  
Ozempic and GLP-1 Current Users: 2,747 responses weighted by US Adults from 10/1/2023 to 10/31/2023

# Appendix



# The CivicScience Intelligent Polling Platform and Methodology

We've pioneered a new method of "always-on" quantitative online research that can capture representative samples all day, every day.



## Our data sourcing

We source our data through partnerships with hundreds of online and mobile content publishers. For them, the integration of our polls and quizzes improves on-site engagement time and provides audience detail unavailable elsewhere. We aggregate all the response data into our centralized platform.



## Our collection process

Our quizzes and polls are non-intrusively embedded in a website's content experience and serve a short set of diverse questions designed to keep respondents engaged. If they choose, respondents can continue to answer a seemingly endless series of fun quizzes and engagement questions as well as custom and syndicated research questions.



## Our respondents

Our data is reliable and organic because our polls are 100% voluntary and respondents are kept anonymous, even to us. They enjoy voicing their opinions and seeing aggregate results presented back to them. Because we collect large response volumes on a national scale, we can deliver representative samples that can be segmented and analyzed in many ways.



## Our analytics

As respondents answer our questions, we store all their answers over time in an anonymous profile. We then use proprietary advanced technology to analyze the data in aggregate and in near real time, cross-tabulating questions to find statistically meaningful correlations for clients to navigate.



# Background: Psychographic Drivers Analysis



## What is a psychographic drivers analysis?

CivicScience's psychographic drivers analysis is a tool that allows brands to identify and explore the top drivers of behavior among core target audiences, e.g. brand purchasers, intenders, and rejectors.

A single question is used to identify core target audiences. Then Bayes Theorem, a mathematical formula for calculating conditional probabilities, is applied, which allows us to see **how people across hundreds of different demographic and psychographic segments will answer that single question.**

From this, one can easily identify the attitudes and beliefs most strongly associated with specific behaviors/outcomes.

## Why is it important?

Clients want to know what's responsible for the weekly, monthly, or quarterly changes in consumer behavior they see. However, with conventional quantitative research, the results are only as good as the survey itself. You have to know the drivers to ask questions about them in the first place. The CS psychographic drivers analysis lets the data speak, often revealing unexpected and powerful results.

## How can it be used?

Our psychographic drivers analysis can be used as the basis of a consumer segmentation that informs both creative and media strategy.

The psychographic drivers can also be used as a targeting approach by *CivicScience Advertising*, our digital media arm.