Ozempic/GLP-1 Consumer Tracker

POWERED BY CIVICSCIENCE DATA

November 2023

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Contents

WHAT WE'RE SEEING:
Ozempic and GLP-1 Current Users

PROFILE   **FOOD**   **RETAIL**   **HEALTHCARE**   **LIFESTYLE**

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.

| I currently use it | I used to use it, but no longer do | I haven't used it, but I intend to | I haven't used it, and I'm not interested | I've never heard of this |
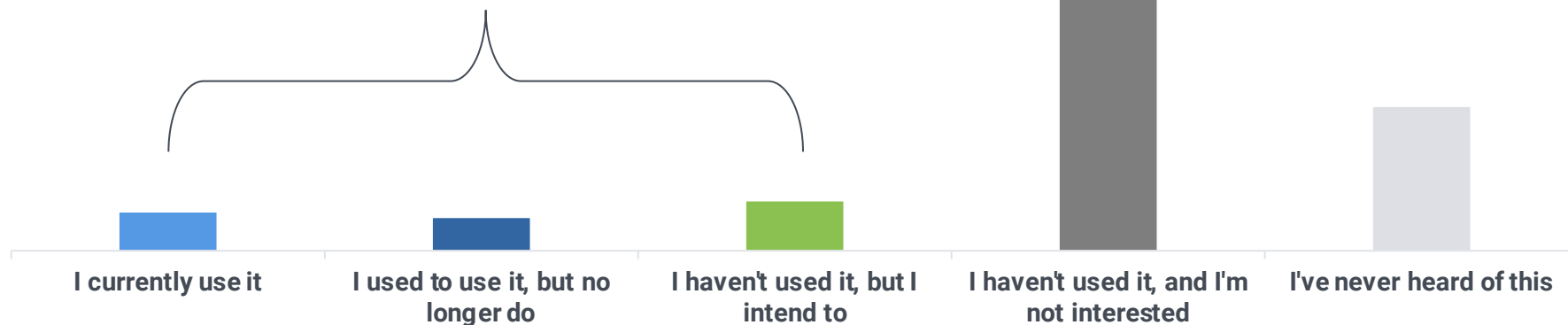
US Adults: 68,000+ responses weighted by US Adults from 10/1/2023 to 10/31/2023

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

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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

Ozempic/GLP-1 Intenders: Segment Profile
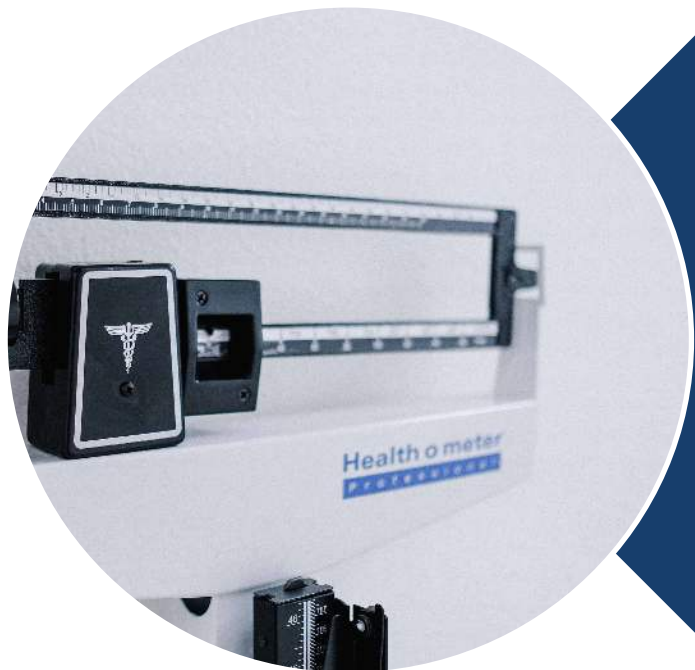
Compared to the average U.S. adult, GLP-1 current users are more likely to be…

- Gen Z adults (+4pp) or Millennials (+3pp)
- Higher income (average +$4k annual HHI)
- City dwellers (+4pp)
- New product adopters (+13pp)
- Influenced (product purchases) by social media — general (+24pp), electronics (+19pp), food (+17pp), clothing/accessories (+13pp)
- Amazon Prime members (+3pp)
- Addicted to digital devices (+14pp)
- Daily video game players (+11pp)
- Active on social media — daily users of Tumblr (+19pp), X / Twitter (+16pp), TikTok (+13pp)

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.
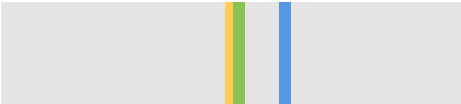
Ozempic Current User

Ozempic Intender
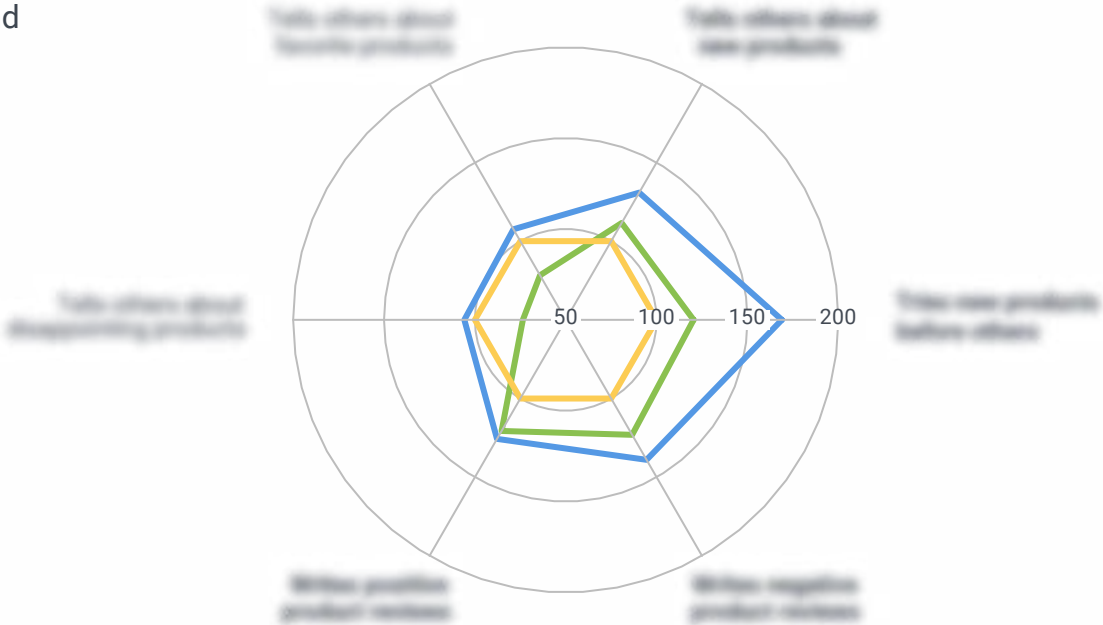
Gen Pop

Findings

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

Ozempic Current User

Ozempic Intender
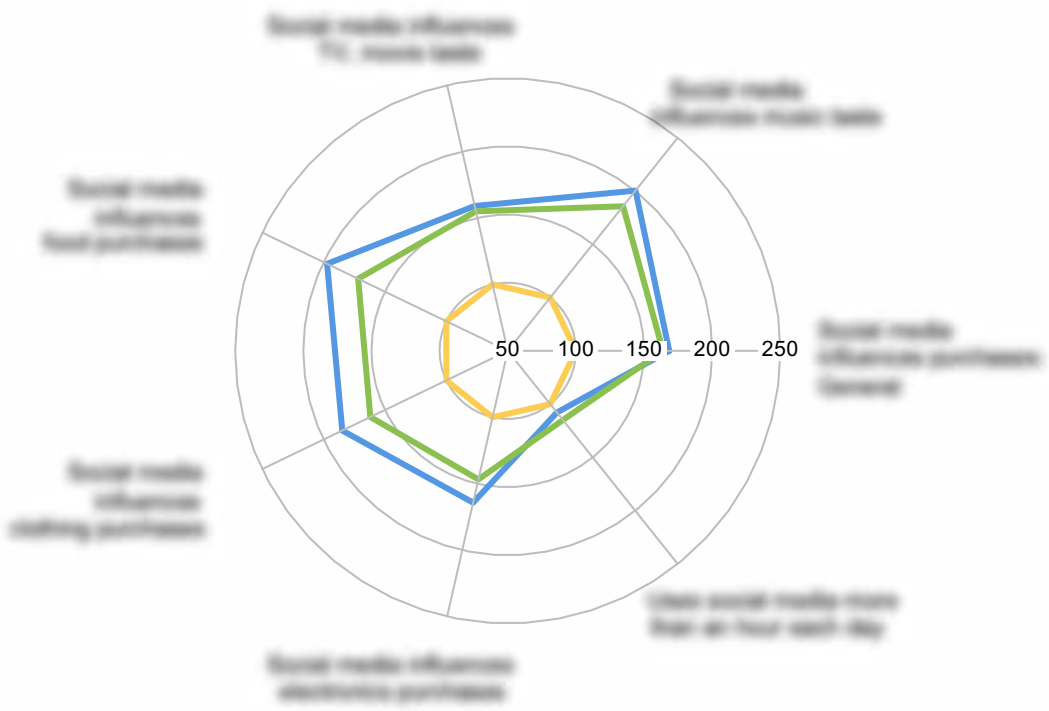
Gen Pop

Findings

The Health & Wellness index aims to identify how segments monitor and maintain their health and well-being.
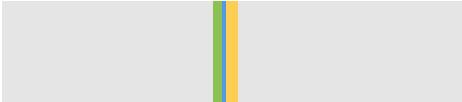
Ozempic Current User
Ozempic Intender
Gen Pop
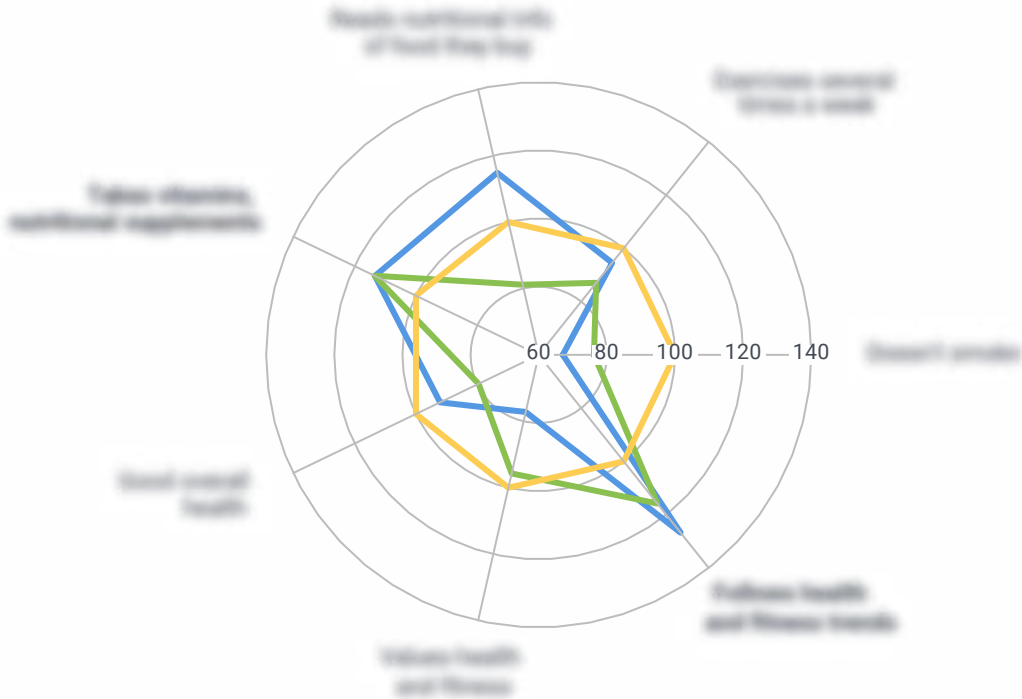
Findings

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
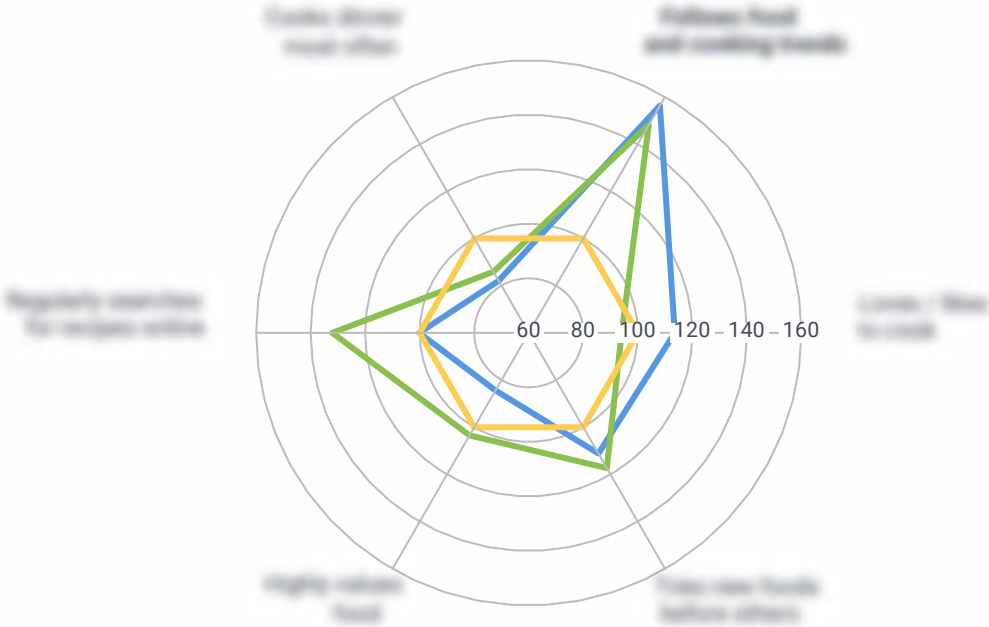
Findings

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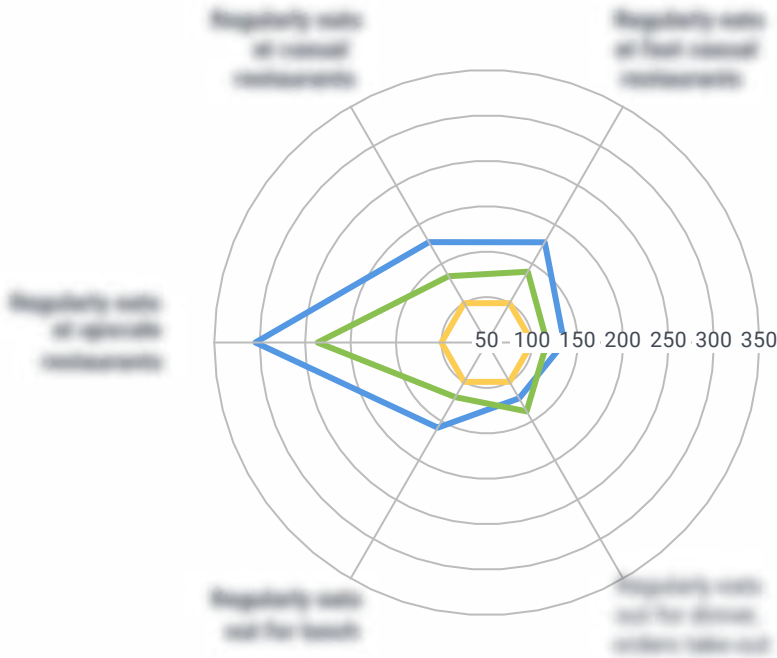
Psychographic Profiles:
Ozempic and GLP-1 Current Users and Intenders

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

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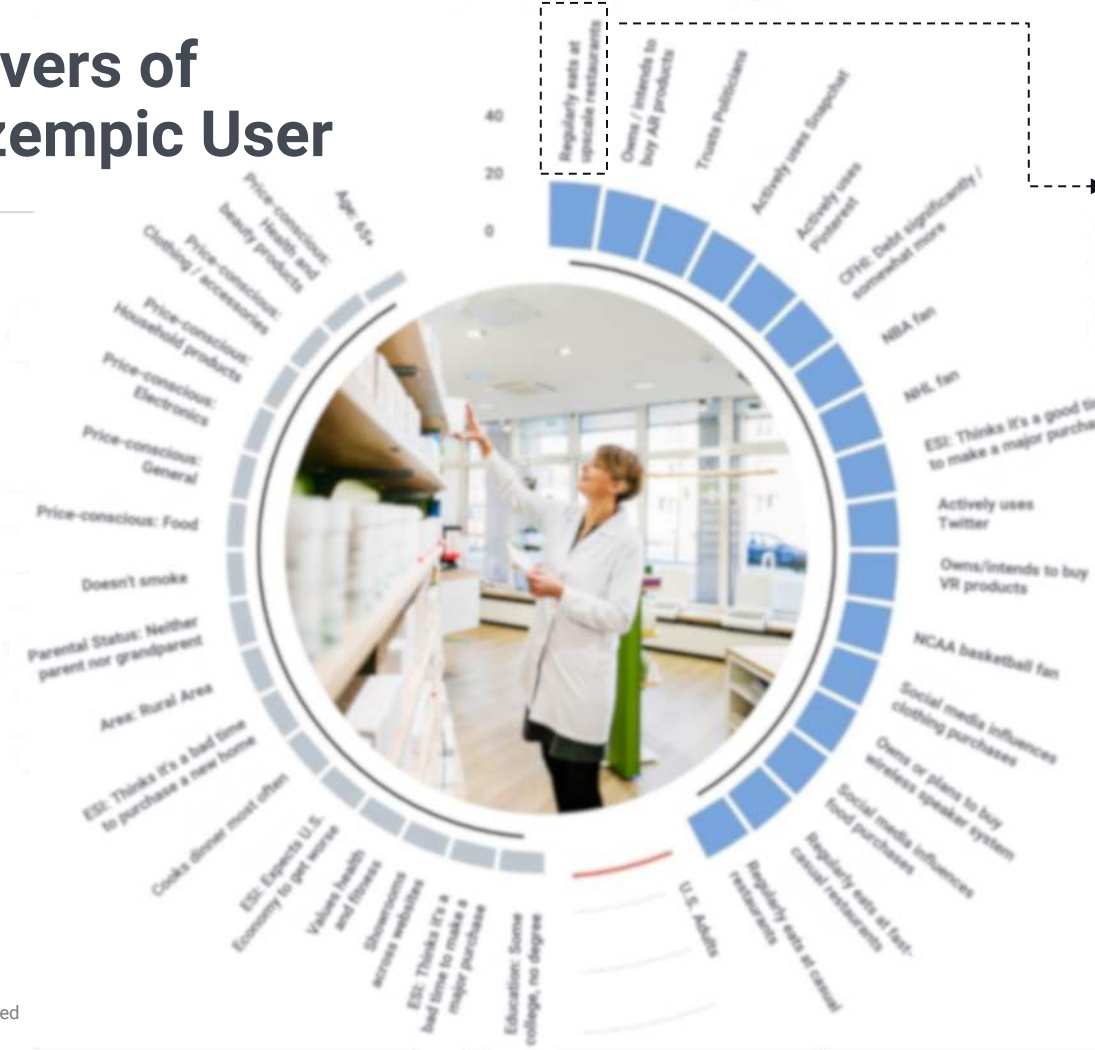
Consumers who regularly eat at upscale restaurants are **far more likely than average** to be users of Ozempic and other GLP-1 medications (+14pp).

Note: Baseline = U.S. Adults (18+).

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.

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

Note: Baseline = U.S. Adults (18+).

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

Note: Based on an analysis of 2,694 questions in the CivicScience syndicated library

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

The Top Drivers of Being an Ozempic Intender

Drivers of Under-Indexing

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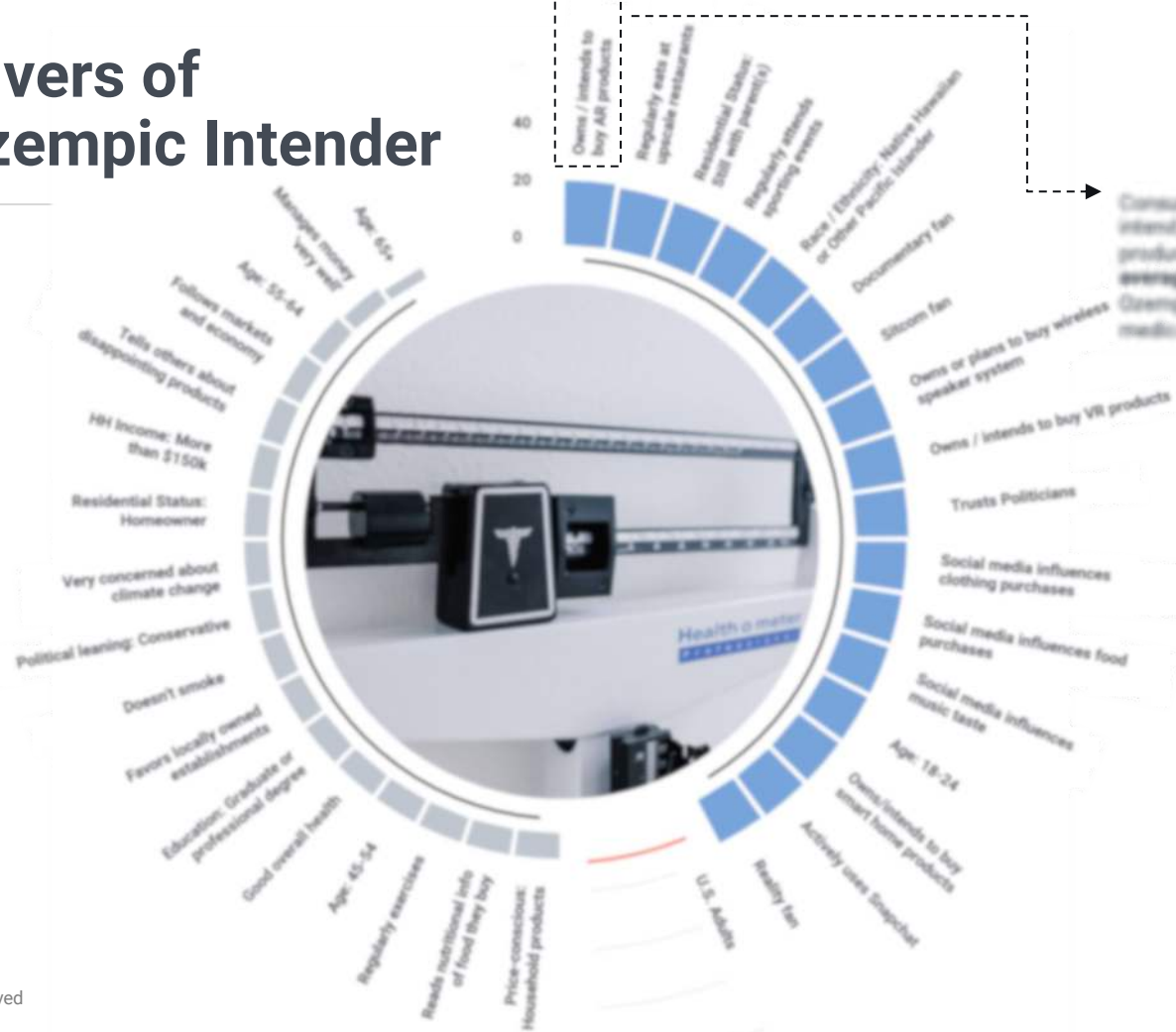
Consumers who say they own or intend to buy augmented reality products are **far more likely than average** to say they intend to try Ozempic or other GLP-1 medications (+12pp).

Owns / intends to buy AR products
Regularly eats at upscale restaurants
Residential Status: Still with parent(s)
Regularly attends sporting events
Race / Ethnicity: Native Hawaiian or Other Pacific Islander
Documentary fan
Sitcom fan
Owns or plans to buy wireless speaker system
Owns / intends to buy VR products
Trusts Politicians
Social media influences clothing purchases
Social media influences food purchases
Social media influences music taste
Age: 18-24
Owns/intends to buy smart home products
Actively uses Snapchat
Reality fan
U.S. Adults

Manages money very well
Age: 65+
Follows markets and economy
Tells others about disappointing products
HH Income: More than $150k
Residential Status: Homeowner
Very concerned about climate change
Political leaning: Conservative
Doesn't smoke
Favors locally owned establishments
Education: Graduate or professional degree
Good overall health
Age: 45-54
Regularly exercises
Reads nutritional info of food they buy
Price-conscious Household products

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.

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

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Note: Baseline = U.S. Adults (18+).

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

■ U.S. adults   ■ Ozempic and GLP-1 current users

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.)

■ U.S. adults   ■ Ozempic and GLP-1 current users

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

Bars
Clothing
Restaurants
Household items
Travel
Toys / hobbies / gifts
Personal care items
Groceries

■ U.S. adults   ■ Ozempic and GLP-1 current users

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 (**Net More Score**)		
Shopping online more or less than usual (**Net More Score**)		

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
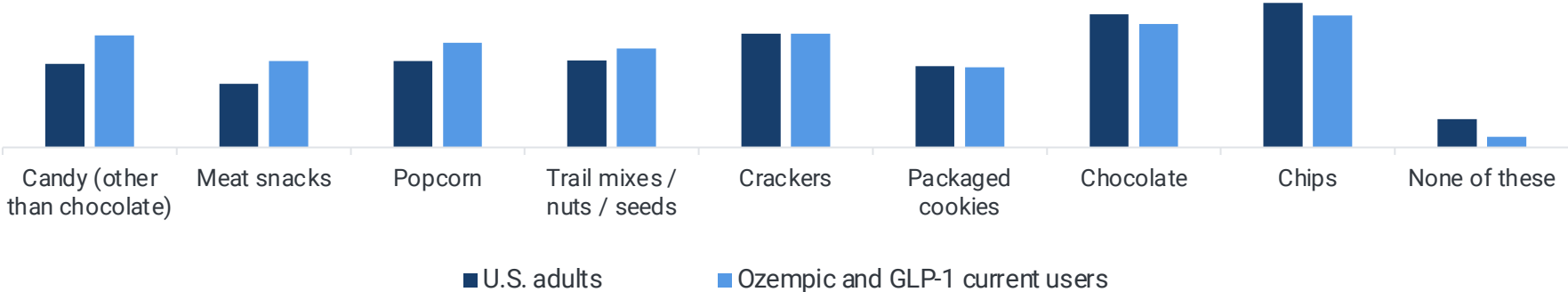
Findings

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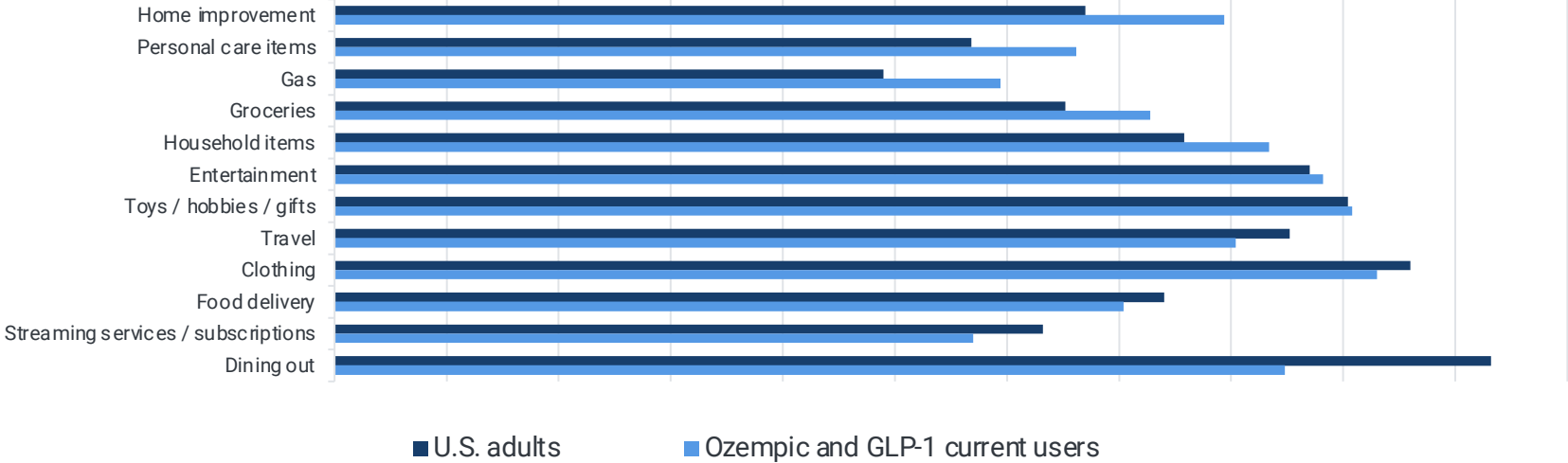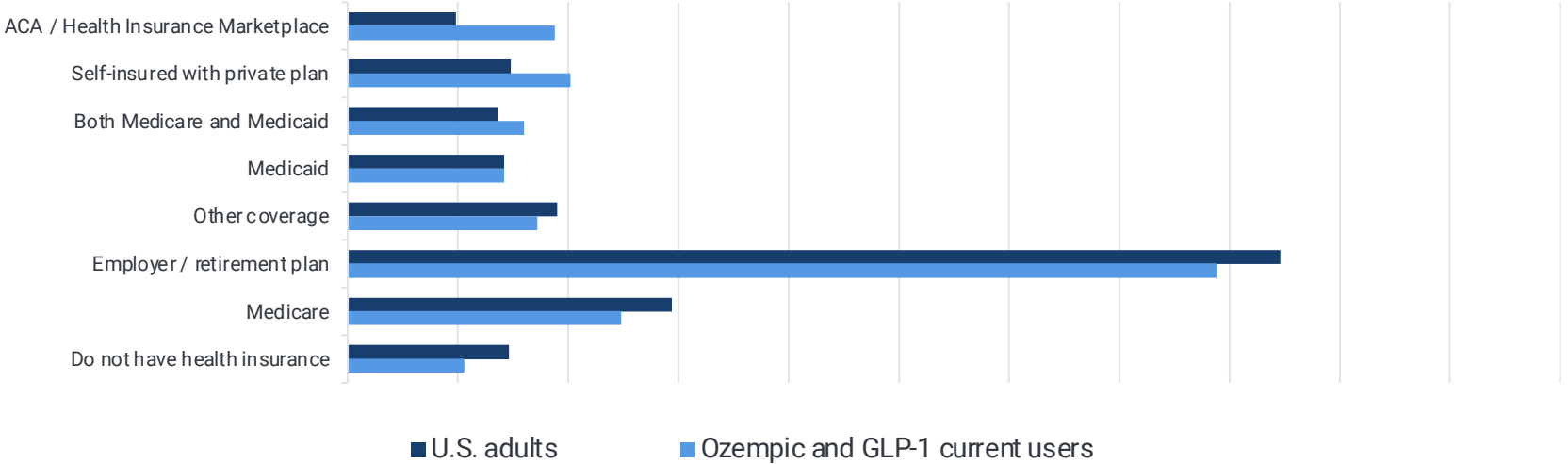
US Adults: 27,859 responses weighted by US Adults from 10/1/2023 to 10/31/2023
Ozempic and GLP-1 Current Users: 2,771 responses weighted by US Adults from 10/1/2023 to 10/31/2023
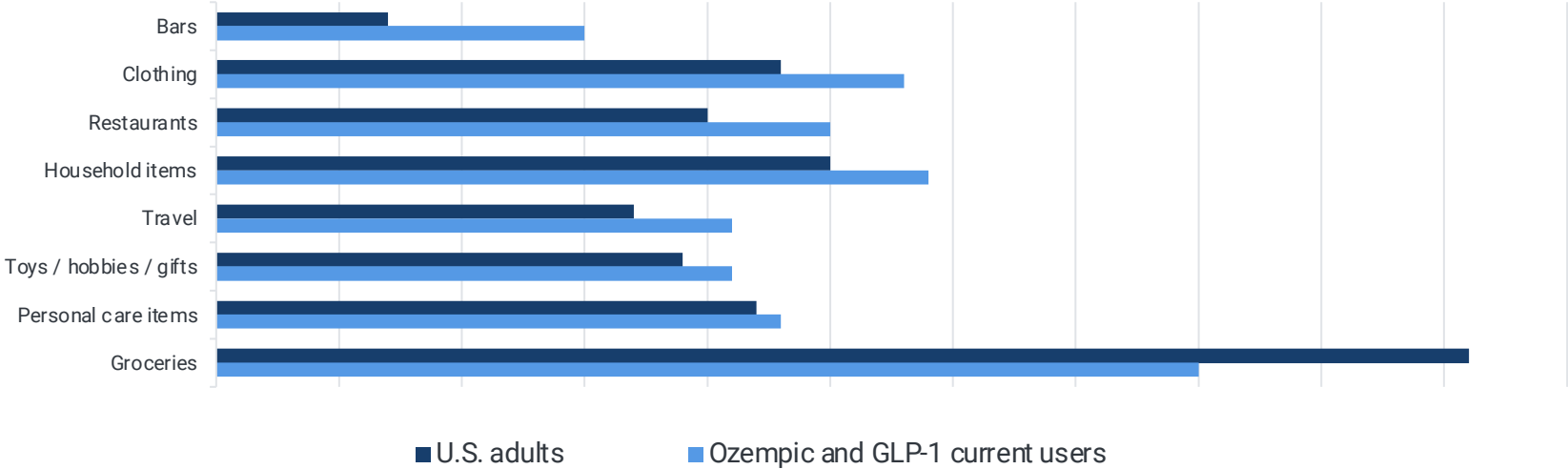
General Lifestyle

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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)			

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

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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.