

**mindsight™**



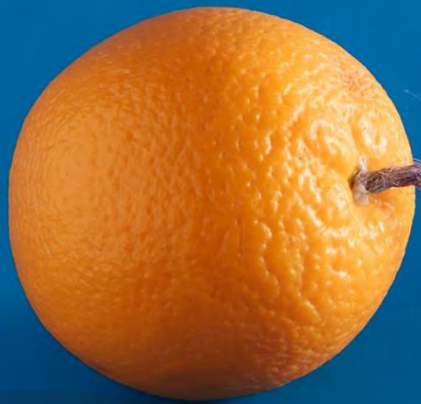
**The Weight Loss Shots are gonna stick.**

**Is your brand ready?**

Who we are  
begins with what  
we believe.



We believe  
all of you can make  
an impact on the  
**brands you manage.**





**We exist to help  
empower it.**

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We do that by  
providing expert  
insight into how  
people behave—  
and why.

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# We've done a lot of that so far.

12

Years  
in Business

89

Categories

229

Brands  
(And counting)

86%

Client Repeat Rate

**Are the weight  
loss shots gonna  
stick?**

# The market is big...

**42.4%**  
of U.S. adults,  
or **109MM people**,  
suffer from obesity



Obesity is a  
leading cause of  
Type 2 Diabetes,  
which affects  
**37MM people** –

**3X**  
what it was 20 years ago

# ...which is why Pharma targeted diabetes...

## OZEMPIC®

In December 2017, the injectable version with the brand name Ozempic was approved for use by people with diabetes in the United States



novo nordisk®

2017

## mounjaro®

FDA approves Lilly's Mounjaro™ (tirzepatide) injection, the first and only GIP and GLP-1 receptor agonist for the treatment of adults with type 2 diabetes

*Lilly*

2022

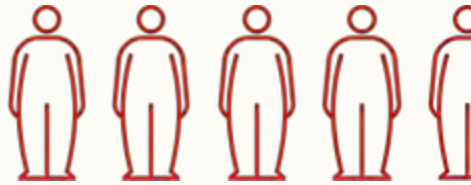


**...so why do we  
think the shots will  
stick?**



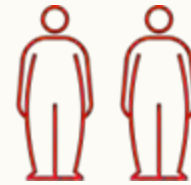
How many are  
using weight loss  
shots — and what is  
the journey to  
adoption?

# The market is sizable—and has doubled in 8 months.



**4.5%**

of U.S. adults, or  
**10MM+ people**,  
are currently taking  
weight loss shots



In June 2023,  
it was  
**2%**

It's a journey that starts with  
a desire to lose weight...



...and a frustration  
that nothing else  
has worked.



## Why They Tried Rx

% selecting

Have  
Used

I wanted to lose weight

86

To feel better about myself

44

I was unable to hit my weight loss goals  
by dieting alone

42

I was unable to lose weight without it

38

I wanted more energy

34

To improve health-related issues  
(excluding diabetes)

25

To help manage my diabetes

22

I don't like dieting/modifying the way I eat

11

I didn't want to exercise

11

I wanted to maintain my weight

5

# It includes doctor support...

## Top 5 Reasons for taking weight loss shots

1.	Doctor Recommendation	50
2.	Improve Overall Health	39
3.	Manage Diabetes	33
4.	Look Better	31
5.	Feel Better About Myself / Self Confidence	30



**56%**

have a doctor  
recommendation



**38%**

requested a  
prescription



...and just recently started.

**First Started**  
taking Rx injectables

Last 6 months **50%**

7-12 Months **29%**

12 Months + **21%**

# The journey involves a big goal...



**236.4 lbs**

Average weight  
when starting the use  
of weight loss injections



**55.4 lbs**

Average amount  
respondents are  
trying to lose



One-quarter  
of their  
body weight



# ...and a big ticket.

Those not covered  
by insurance  
pay at least  
**4 times as much**

## Average Out-of-Pocket Cost per Month

Average

\$192.70

Covered/ Partially  
Covered

\$106.53

100%  
Out-of-Pocket

\$422.41

**80%**

of users claim  
insurance pays part  
or all of the cost



**20%**

of users claim to  
pay the entire cost  
out-of-pocket

What happens  
after use begins?

# The shots lead most to eat less overall...

## Change in Food Consumption



I eat **more** than I did prior to starting weight loss injections

**10%**



I eat **the same amount** as I did prior to starting weight loss injections

**23%**



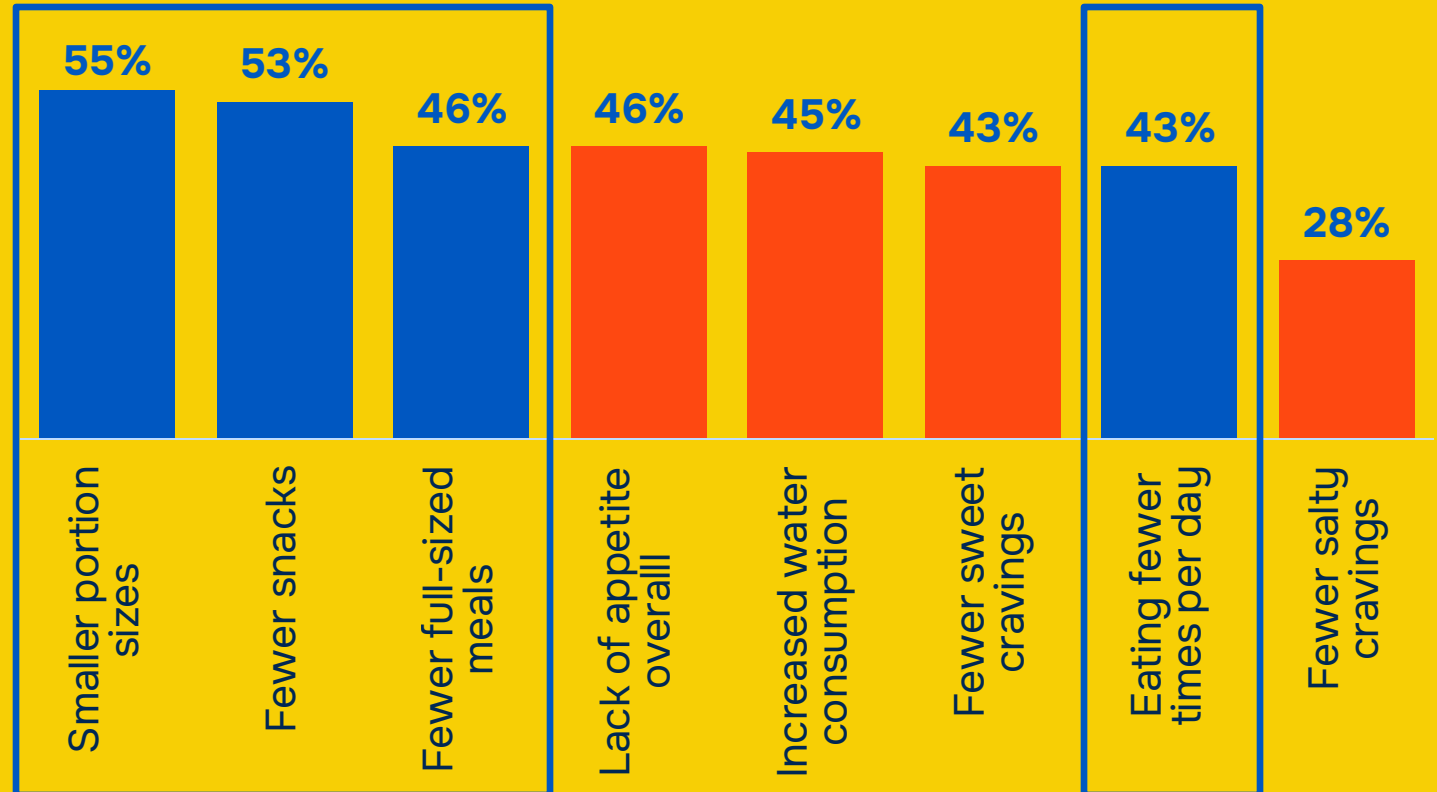
I eat **less** than I did prior to starting weight loss injections

**67%**



...whether by way of eating smaller portions or eating fewer times.

## Change in Eating Patterns



# Those occasions include much less junk...

## Change in Eating Approach

<b>Ate less junk food</b>	<b>54%</b>
<b>Ate healthier foods overall</b>	<b>46%</b>
Ate more fruits / vegetables	46%
Ate more proteins / meats	34%
Began prepping more at home	32%
<b>Ate less packaged foods</b>	<b>30%</b>





## Nutrition Facts

5 servings per container

**Serving size**

Amount Per Serving

**Calories**

Total Fat 3.5g

Saturated Fat 0g

Trans Fat 0g

Cholesterol 0mg

Sodium 150mg

Total Carbohydrate 8g

Dietary Fiber 2g

Total Sugars 1g

Includes 1g Added Sugars

Protein 15g

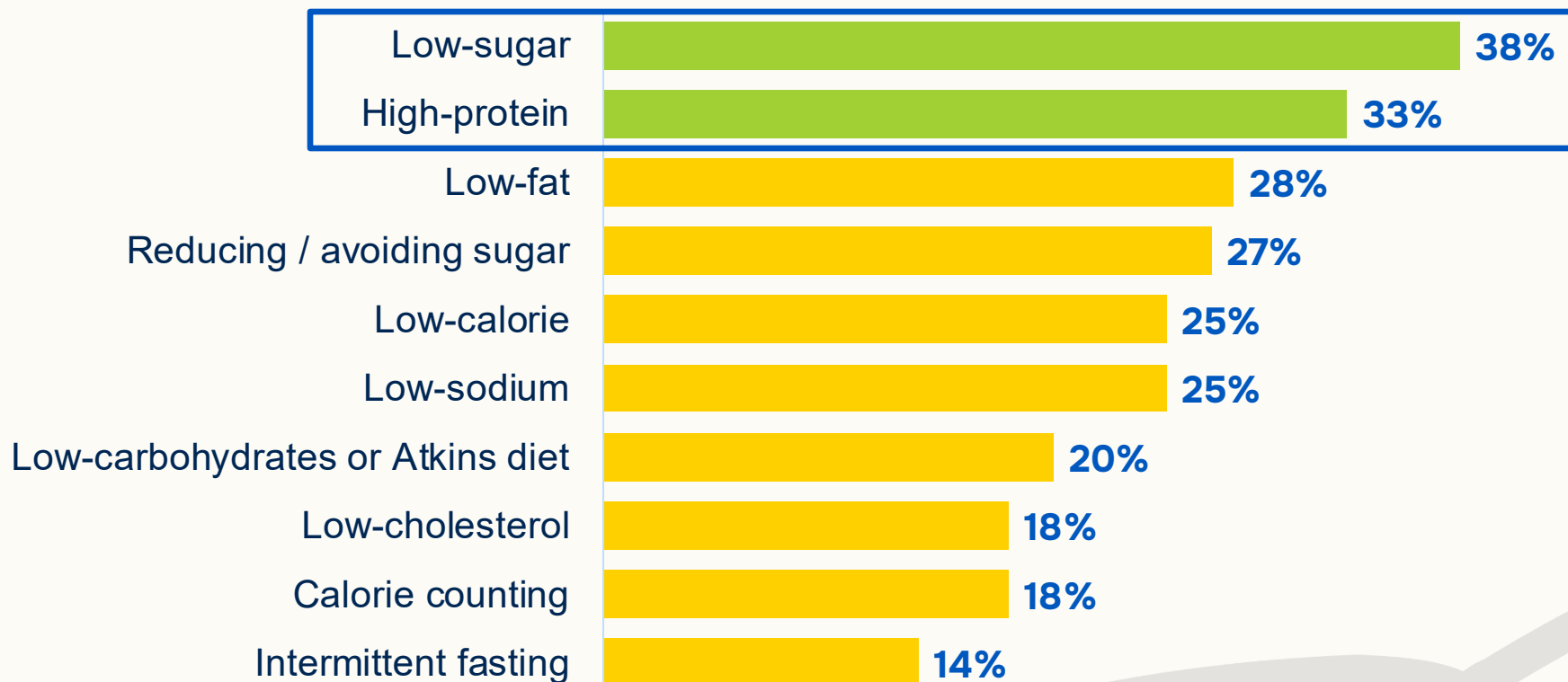
Vitamin D 0mcg 0% • Calcium 5

Iron 2mg 10% • Potassium 334r

\*The Daily Value (DV) tells you how food contributes to a daily diet. 2,000 general nutrition advice.

# ...and reflect a focus on low sugar, high protein alternatives...

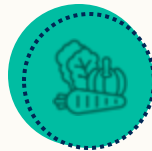
## New Approaches to Eating



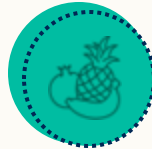


# ...particularly clean proteins.

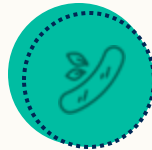
## They're eating more of...



Fresh Vegetables | **58%**



Fresh Fruit | **57%**



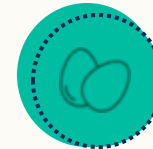
Plant-Based Meats | **36%**



Yogurt | **34%**



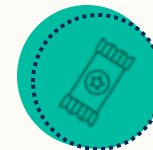
Plant-Based Proteins | **29%**



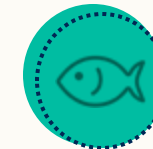
Eggs | **24%**



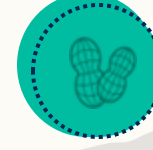
Poultry | **24%**



Protein / Nutrition Bars | **23%**



Seafood | **20%**



Nuts / Seeds | **15%**

# High sugar, high calorie foods are avoided...

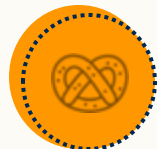
## They're avoiding...



Packaged Cookies | **59%**



Ice Cream / Novelties | **59%**



Chips / Pretzels | **59%**



Chocolate Candy | **55%**



Frozen Pizza | **53%**



Frozen Appetizers | **51%**



Frozen Snacks | **49%**



Breads | **47%**



Pasta | **43%**



Non-Chocolate Candy | **42%**



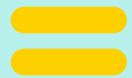
# In contrast to food, weight loss shot users drink the same or more...

## Change in Drink Consumption



I drink **more** than I did prior to starting weight loss injections

**30%**



I drink the **same amount** as I did prior to starting weight loss injections

**46%**



I drink **less** than I did prior to starting weight loss injections

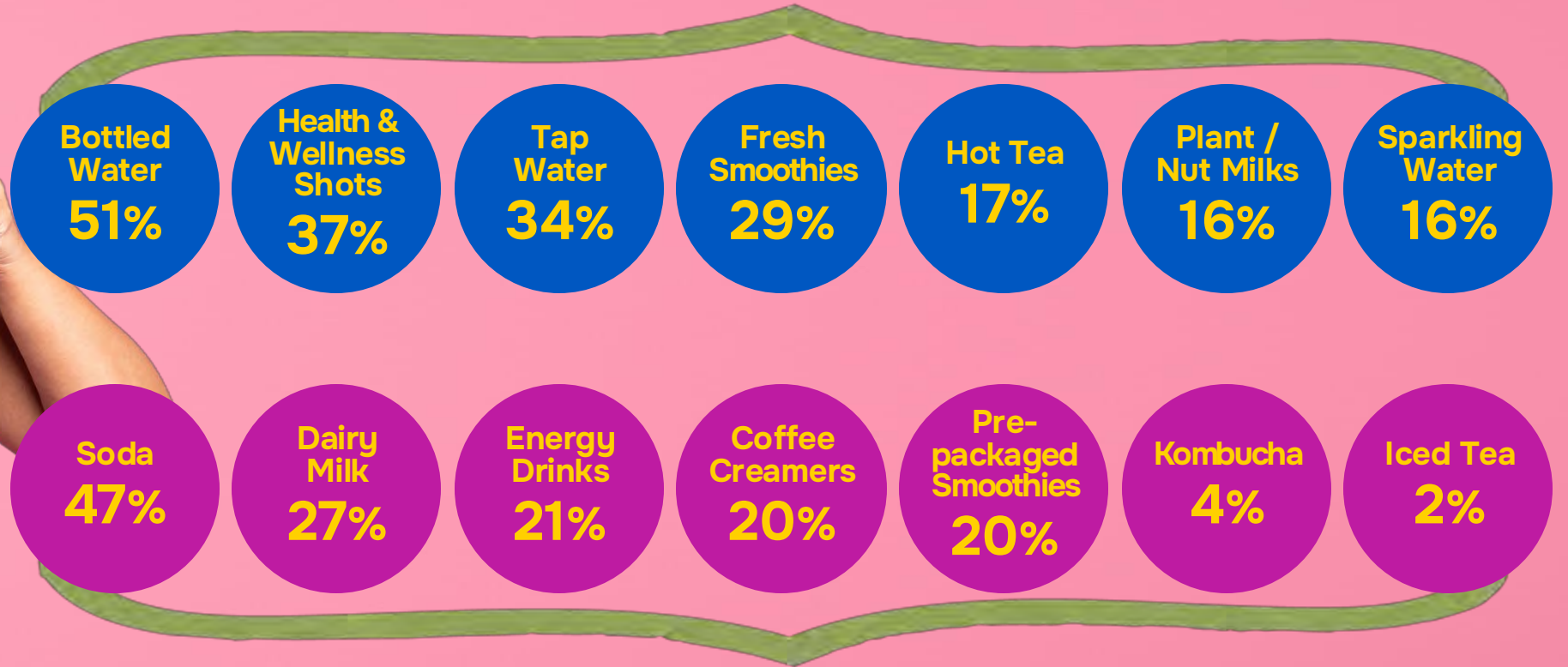
**24%**



# ...and increase clean, fresh options, while letting go of high sugar choices.



More of these



Less of these

**How do users  feel  
about the  
experience?**

# Well, just about everybody has side effects...

**69%**  
Experience  
Side Effects

*They experience  
2.4 side effects  
on average*

**31%**  
Do Not  
Experience  
Side Effects

Nausea	34%
Diarrhea	28%
Stomach Pain	24%
Constipation	24%
Heartburn	21%
Tiredness	20%
Vomiting	13%



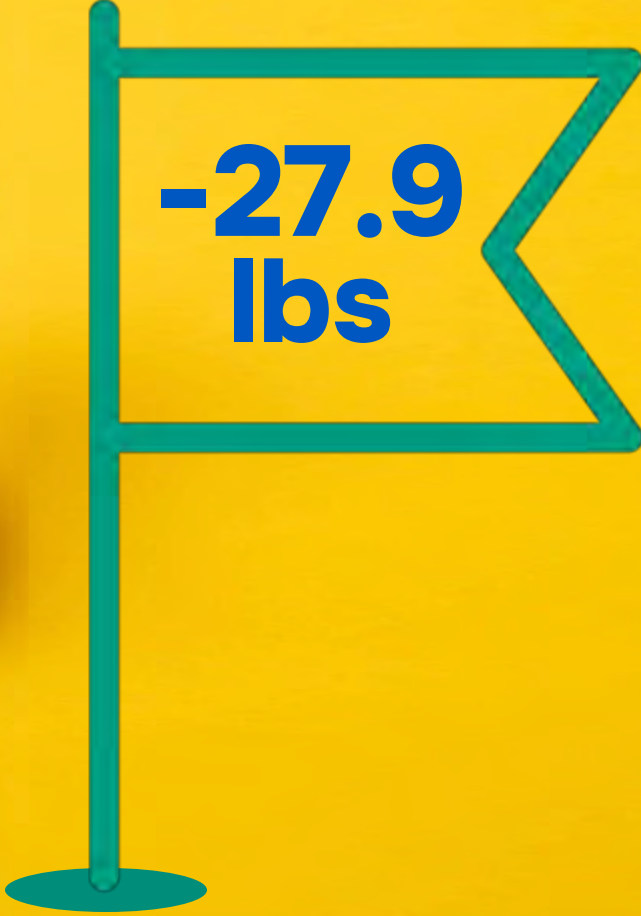
# ...but for most, don't seem too bad.

Occasionally, I have an **upset stomach**, but it doesn't bother me too much.

Sometimes, it makes me **feel sick and nauseous**, but I have had great results from using it!

I didn't experience any side effects other than **a few stomach aches**, but it really works!

# And most haven't reached their goal...



Achieved or came close to their goal



Lost some weight

...but despite that and the cost, satisfaction and value ratings are very high.

<u>Value</u>	100% Covered or Partially Covered by Insurance	100% Paid Out-of-Pocket
% Rating it an Excellent or Good Value	<b>77%</b>	<b>64%</b>
<u>Satisfaction</u>	100% Covered or Partially Covered by Insurance	100% Paid Out-of-Pocket
% Extremely or Very Satisfied	<b>81%</b>	<b>76%</b>



# That's likely because of this.

I've **lost 90+ lbs.** and have had very few side effects.

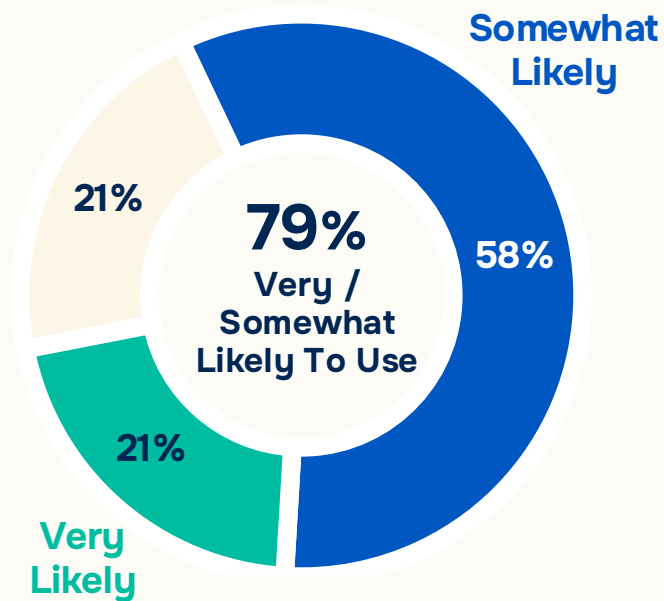
It literally **made me not hungry** for the first time in my life and I had **no side affects** at all.

I have **lost more weight than I ever have**, and I am very happy with my progress!

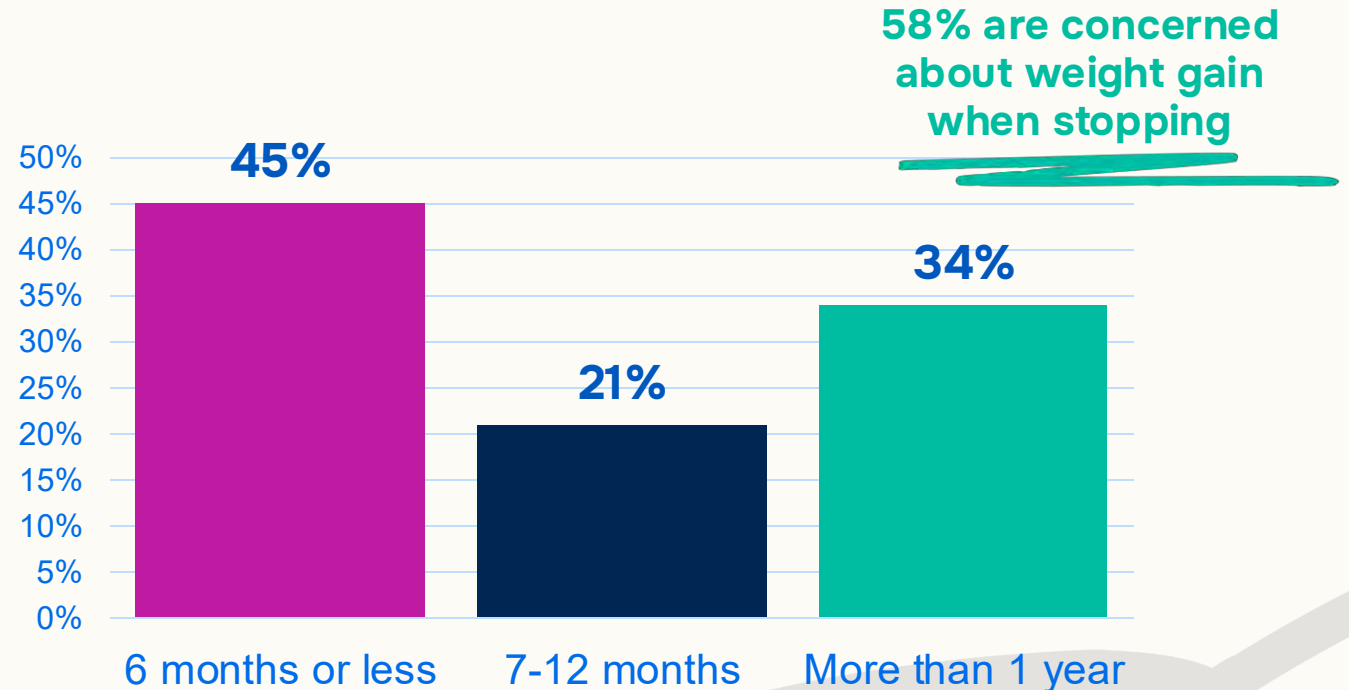
**I lost 20 lbs.** in 30 days. Enough said.

That's likely why 80% of users intend to keep using them for 6 or more months, which is probably fueled by their concern about regaining lost weight.

### Intent to Use in the Future



### How Long They Plan to Use



**And if that  
doesn't convince  
you...**



# The market is going to get much bigger...



It's predicted that  
**58%**  
of the U.S. population  
will be obese by 2035

Goldman Sachs  
estimates that  
**13%** of U.S. adults  
will be taking weight  
loss drugs by 2030

We think they are low—  
**12.3%**  
of U.S. adults  
claim to be actively  
considering use now

# ...as no one sees it slowing down...

## Pharm Sales; Pharm Execs weigh in

The **beauty of a med spa** is that they provide a holistic approach.

Providers tend to be very positive, but concerned about post-use weight gain. **How do we get patients to change their habits?**

**Retailers and Brands** are reaching out to us.  
—*Lilly Exec*

It's a huge **money-maker!**

...particularly the companies rushing to  
build an ecosystem of support.

WELLNESSES

A row of ten wooden blocks spelling out the word 'WELLNESSES'. The first block has a green 'W', the second has a green 'E' and a red 'I' below it, and the remaining seven blocks have black letters: 'L', 'L', 'N', 'E', 'S', 'S'. The blocks are set against a solid orange background with faint, curved lines in a lighter shade of orange.

**What we  
recommend you  
think about  
doing...**



# First—Communication.

**Protein**



**No Sugar/  
Low Sugar**



**Satiation**



**Freshness**



# Second—Innovation.



## Products

- High Protein
- No / Low Sugar



## Packaging

- Smaller Sizes
- Portion Control

# Third—Support.



## Tactical Campaigns

Be a brand that helps support users in their journey



## Influencer Marketing

Medical Professionals,  
Nutritionists, Dieticians, MedSpas





Something to **share.**  
Case Study