August 15, 2026

NACDS TOTAL STORE EXPO

What Will Retail Health Look Like in the Future

and How Can AI Support It?

Deborah Weinswig

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CORESIGHT RESEARCH

Introducing Coresight Research

We provide leading retailers, brands, technology companies, and investors with insights, data, and advice to anticipate change and profit from the disruption reshaping the global retail landscape.

CORESIGHT RESEARCH

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Help clients in the retail ecosystem accelerate innovation and growth

FOCUS

Innovation and disruption at the intersection of retail and technology

DEEP RETAIL EXPERIENCE

Team includes leading retail and technology influencers, executives, analysts, and advisors

NETWORK EFFECT

Expand professional networks through our events, our mentor network and one-to-one interactions

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The Coresight Pillars

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Closed-door AI discussions with retailers and brands

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1-on-1 strategies for ecosystem leaders

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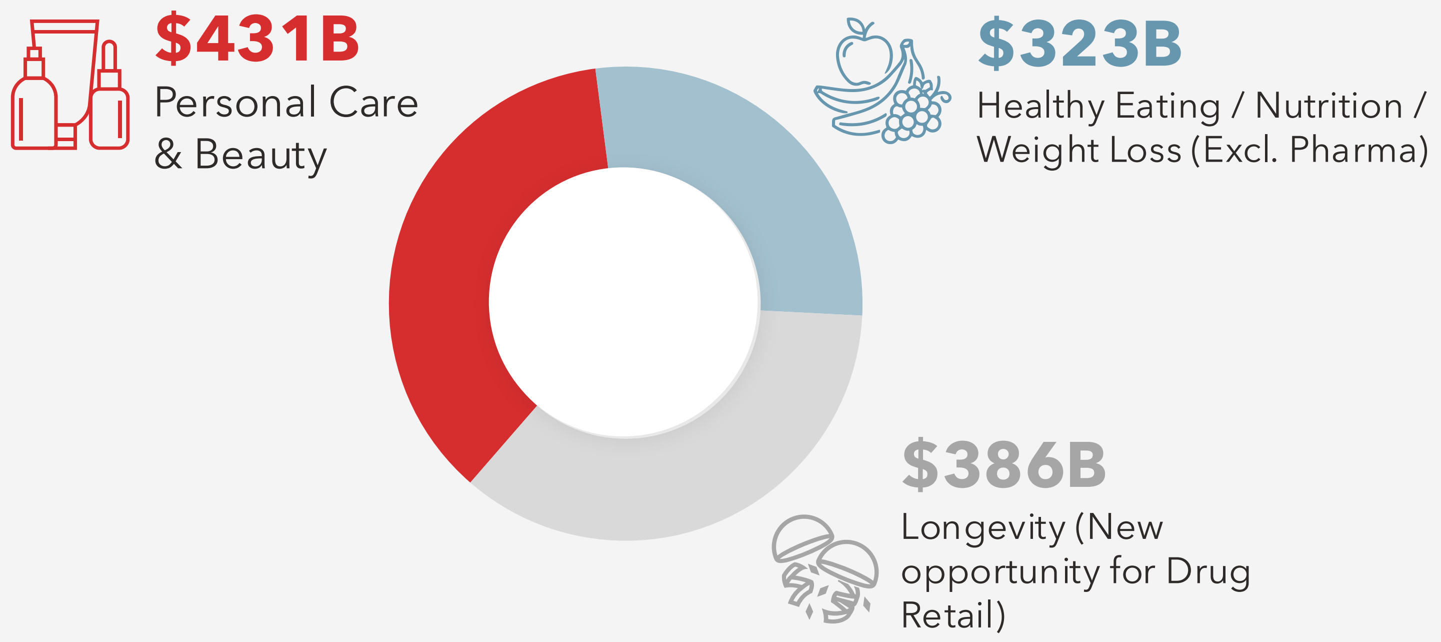
THE SITUATION

The $1 Trillion Wellness Opportunity Continues to Grow

The fastest-growing lines are the ones furthest from the traditional planogram and include diagnostics, wearables, personalized medicine, and so much more. .

KEY US WELLNESS MARKET



19.1%

Meditation and mindfulness CAGR – the category's fastest line

14.3%

Fitness technology CAGR, vs. (0.8)% for fitness equipment

11.7%

Mental wellness CAGR – sleep and cognition

Source: Global Wellness Institute/Coresight Research. Some categories overlap; overlap is not adjusted for in the total.

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THE SHIFT

Wellness is Becoming Longevity

Customers aren't buying wellness. They are looking to buy time.

Wellness ▶ Prevention ▶ **Treatment** ▶ Adherence ▶ Longevity

The pharmacy historically has owned treatment. **Now everything on either side of it is up for grabs.**

WHAT LONGEVITY PULLED TOGETHER

- **Wearables** – HRV, recovery, sleep
- **Peptides, NAD+, mushrooms, biotics**
- **Biomarker testing** – 48 to 250+ marker panels
- **GLP-1s**

WHY IT MATTERS TO RETAILERS

A lifestyle purchase is discretionary and price-sensitive.

A longevity purchase has a health rationale attached.

Identical behavior, completely different willingness to pay.

Source: Coresight Research

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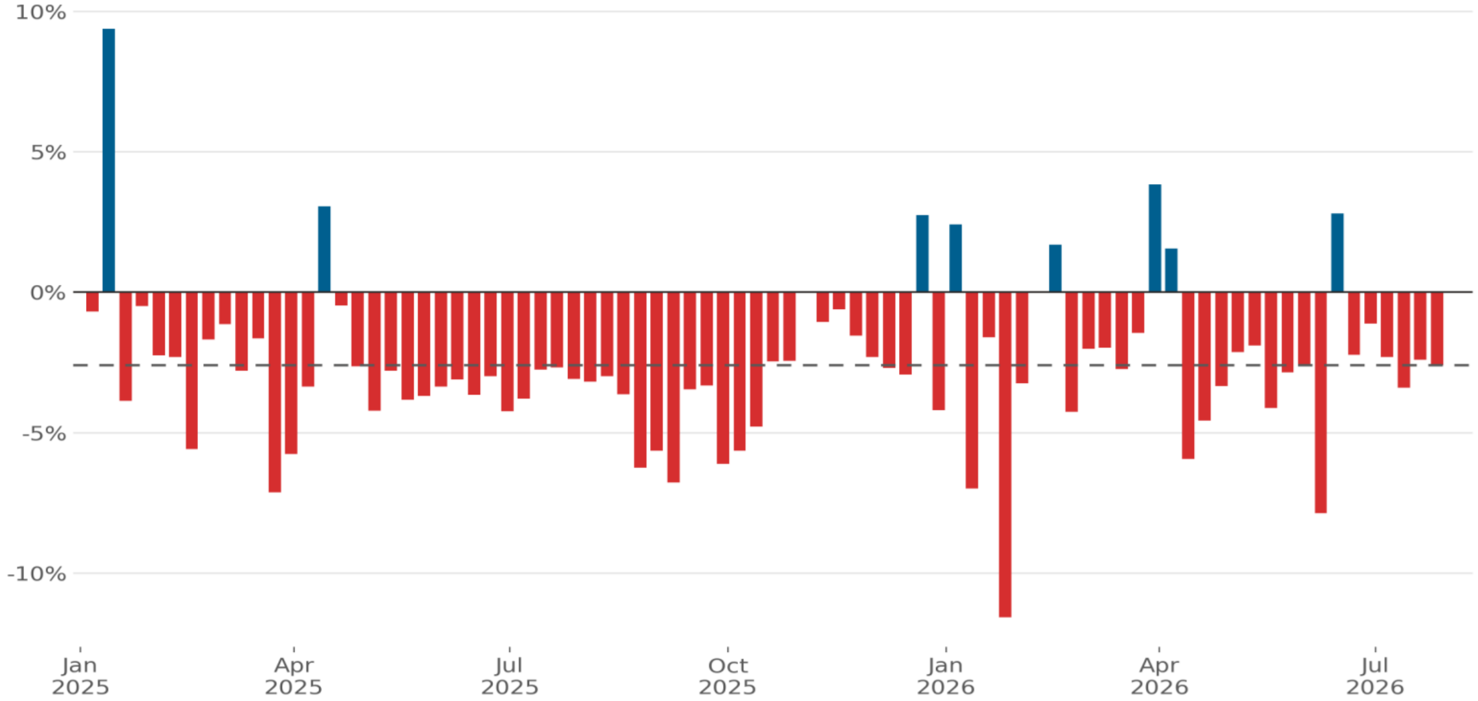
THE NEW BASELINE

75 of the last 83 weeks, fewer people walked into the store

A year and a half of structural decline, remarkably stable. That stability shows this is the new normal.

US DRUGSTORES & PHARMACY VISITS

Nationwide, weekly visits, % change vs. same week prior year



–2.6%

Average weekly visits vs. prior year, across 83 weeks

90%

Of weeks below prior year. No season where it turns.

–11.6%

Worst single week, w/e 26 January 2026

Source: Placer.ai, US drugstores & pharmacies, nationwide, weeks ending 6 January 2025 – 3 August 2026.

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DEMAND SIGNALS

CPG Majors are Buying into Longevity

$1.2B

Unilever acquires Grüns, the gummy brand

$3.8B

P&G acquires Thorne, the science-led nutrition brand.

Sources: Axios (Grüns deal value, April 2026); company announcements; Google Trends (US); FDA Pharmacy Compounding Advisory Committee, July 2026.

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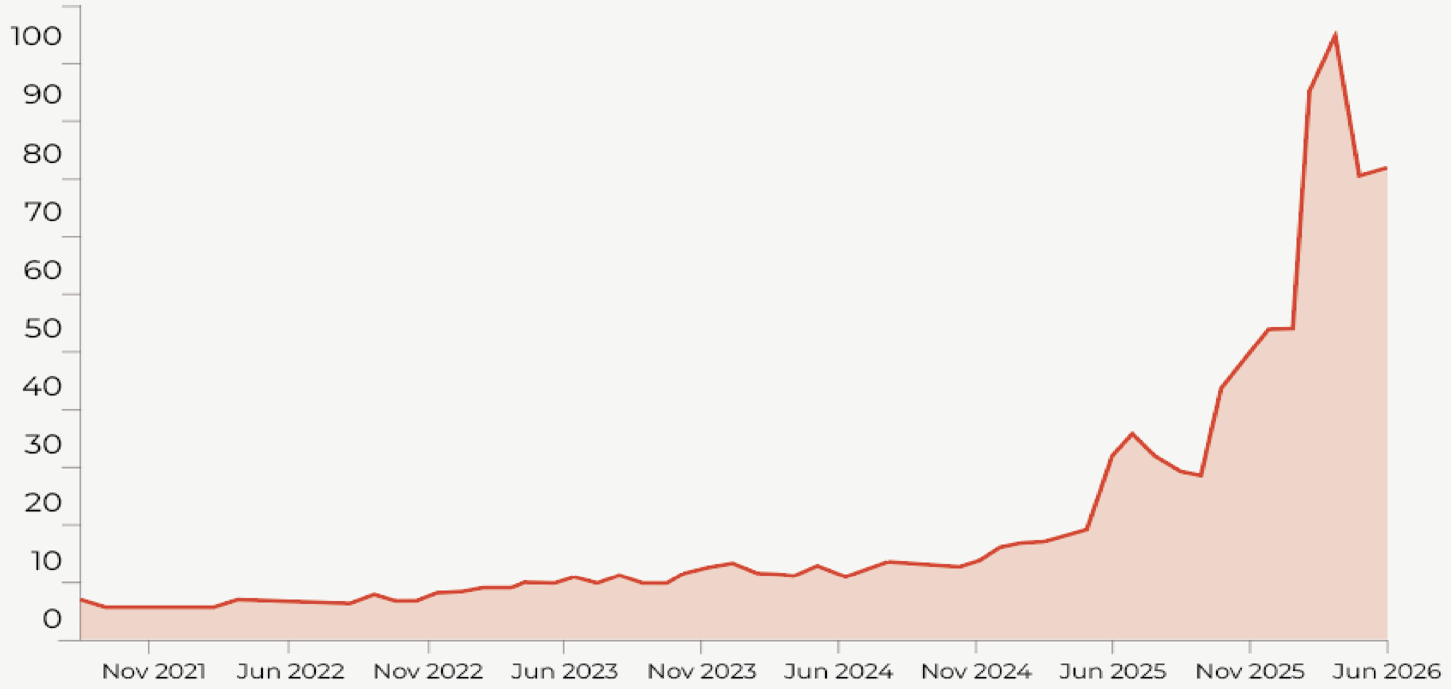
BPC-157: The Next Consumer Goldrush?

GOOGLE TRENDS INDEX FOR "BPC-157" WEB SEARCHES IN THE US

100 = Peak Searches



~33×

Rise in **BPC-157** search interest since 2021. Not FDA-approved.

consumer demand is running substantially ahead of clinical validation and the regulatory framework

Sources: Axios (Grüns deal value, April 2026); company announcements; Google Trends (US); FDA Pharmacy Compounding Advisory Committee, July 2026.

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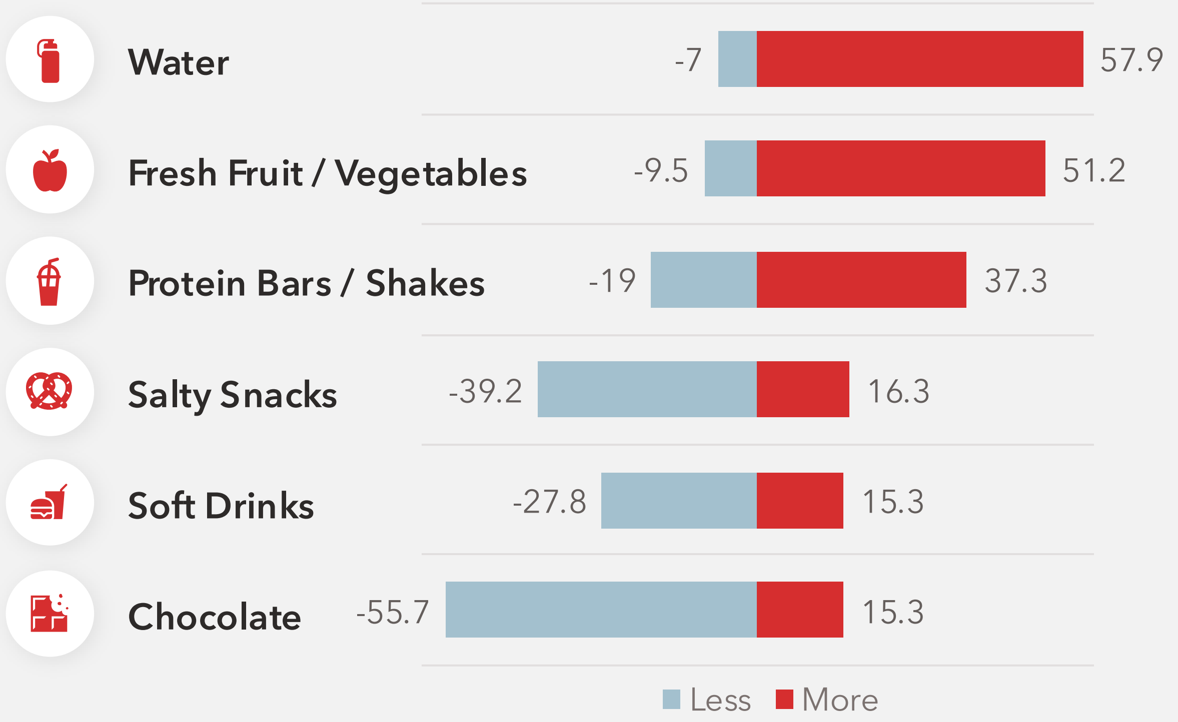
THE GLP-1 SHOPPER'S BASKET

Shifting to Hydration, Produce and Protein

GLP-1 users are eating less overall, but the basket is shifting composition – this is a rotation, not just a reduction.

Change in Consumption Among GLP-1 Users

% point change vs. before starting GLP-1



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59.8%

of GLP-1 users are eating **smaller portion sizes**

28.2%

One-in-three GLP-1 users is taking more vitamins/supplements (28.2%)

GLP-1 shoppers are more concerned with **quality** and **less concerned** with **price** than non-users – and more open to private label

Source: Coresight Research (209 US GLP-1 drug users, April–June 2026; 2,013 US respondents, June 2026)

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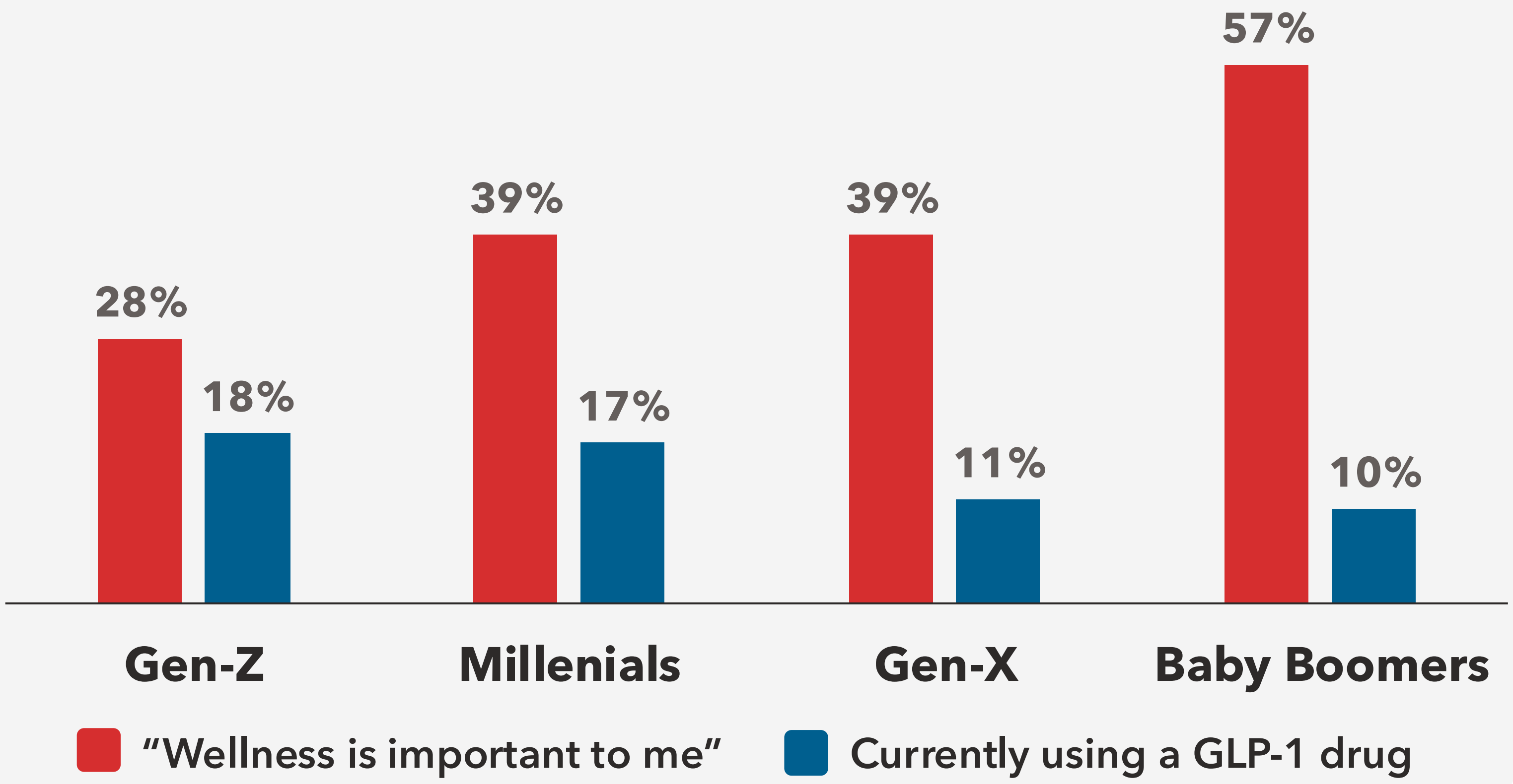
Baby Boomer's focus on Wellness, Gen-Z on Beauty

CORESIGHT RESEARCH PROPRIETARY DATA

US CONSUMERS ON WELLNESS AND GLP-1 USAGE



28.5pt

Boomer–Gen Z gap on the importance of wellness

Baby Boomer Wellness interest is longevity

Gen-Z GLP-1 usage is cosmetic

Base: 2,013 US respondents aged 18+, June 2026 (wellness); 1,607 US respondents aged 18+, April–June 2026 (GLP-1). Source: Coresight Research.

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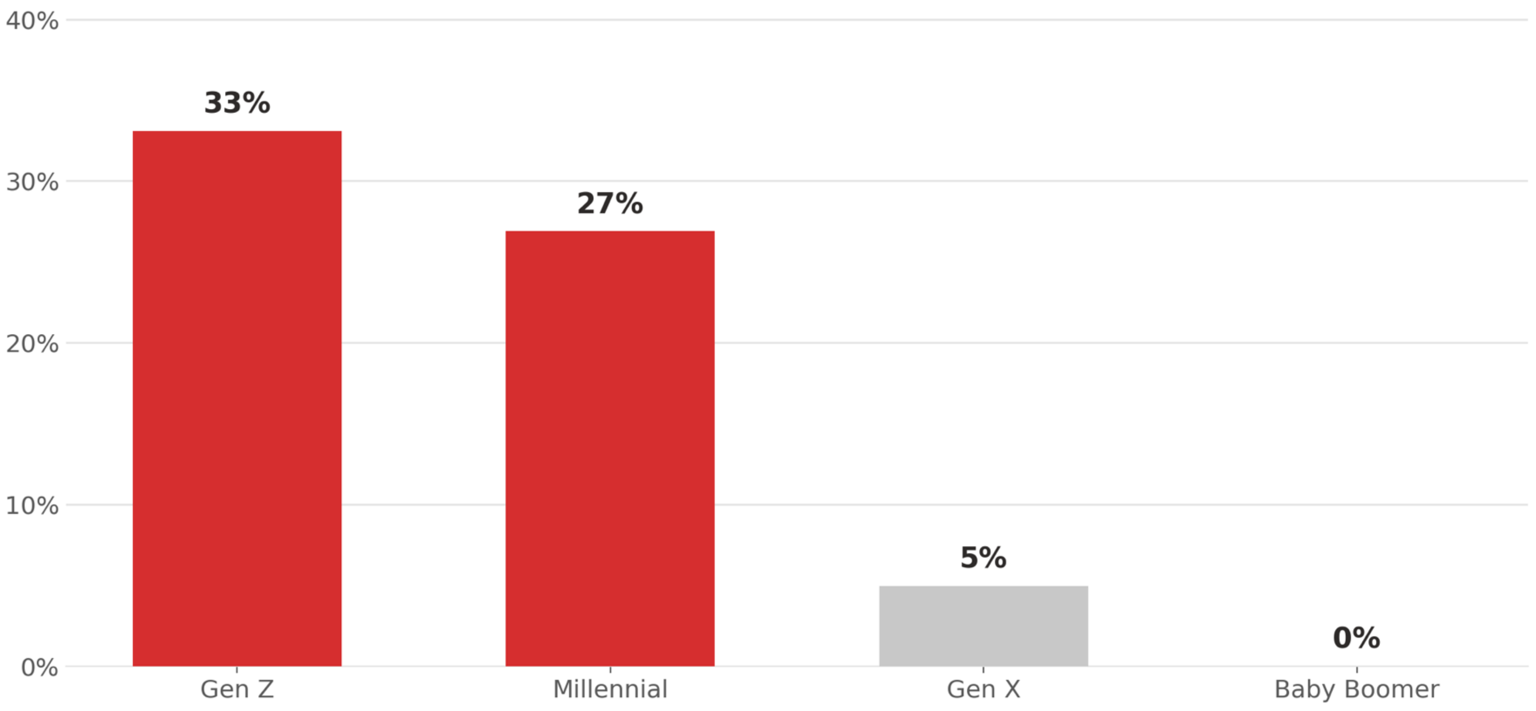
THE FINDING

Gen-Z Use GLP-1 as a Beauty Shortcut

CORESIGHT RESEARCH PROPRIETARY DATA

GLP-1 CONSUMERS THAT CONSUME MORE UNHEALTHY FOOD

% Average across chocolate, cookies, salty snacks, candy, ice cream, soft drinks



"I know I don't really need to lose weight. I'm just having a hard time exercising regularly, and I'd feel better about how I looked."

Gen-Z adult considering GLP-1

24%

started nutritional support against muscle loss

29%

are taking more vitamins and supplements

Base: 99 US GLP-1 users aged 18+ — Gen Z n=19, Millennial n=34, Gen X n=26, Boomer n=20. Low bases; directional. Source: Coresight Research.

INDUSTRY INSIGHT

GLP-1 Is Changing the Body & Basket

	T0 Onset	T3 Rapid loss	T6 Plateau	T12 New body
Nutrition	Satiety, portions	Protein density	Micronutrients	Habit, maintenance
Fitness	Mobility, baseline	Resistance training	Strength plateau	Long-term routine
Cosmetics	Prevention	Skin elasticity	Facial volume, hair	Firming, tone
Apparel	Baseline size	−2 to −3 sizes	−4 to −6 sizes	New shape, not just size

Opportunity to Offer GLP-1 adjacent products

Source: Euveka/Coresight Research.

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INDUSTRY INSIGHT

A Bodydata Lab Creates an Opportunity to Serve the GLP-1 Customer

euveka

Euveka's patented robot measures seven anatomical shapes that projects how the GLP-1 body shifts.

Source: Euveka/Coresight Research.

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THE SOLUTION

Focus on 3 AI-driven strategies to Capture the Longevity & Beauty Opportunities

1 PRODUCTS

Focus on the Longevity and the Beauty Buyer as Separate Segments

Emerging nutrition, connected health, life-stage. Deep range online, returns in store.

AI Focus

Forecasting, shelf intelligence, planogram optimization, trend detection.

2 SERVICES

Pull the pharmacist out from behind the counter

Test to treat, telehealth loops, life-stage services.

AI Focus

Use AI to drive coaching and triage – not medical advice.

3 MARKETING

Focus your data on these Consumers

90M+ and 101M+ addressable shoppers. It is pointed at suppliers, not at your own proposition.

AI Focus

Unified profile, decisioning on offer, channel and timing.

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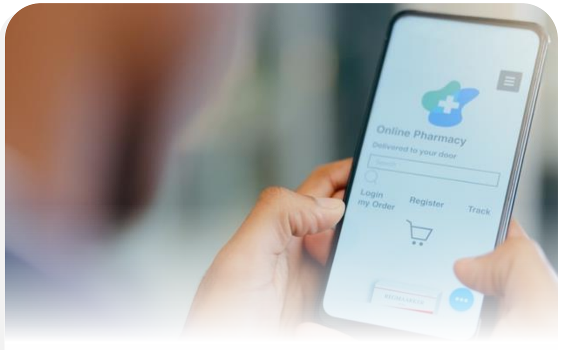
Focus on Longevity and Beauty

Emerging nutrition – greens, gummies, peptides, NAD+, functional mushrooms

DTC-originated brands crossing into physical distribution, with format doing the work.

Wearables – and the mechanic that makes it yours

Oura became HSA/FSA-eligible in 2023.



The extended aisle – you don't have to stock everything

Full range online, driven by your own in-store media, with the return taken in store for instant credit.

OMNISTREAM

Base: 803 US respondents aged 18+ (99 GLP-1 users), 2026. Sources: Coresight Research; company announcements.

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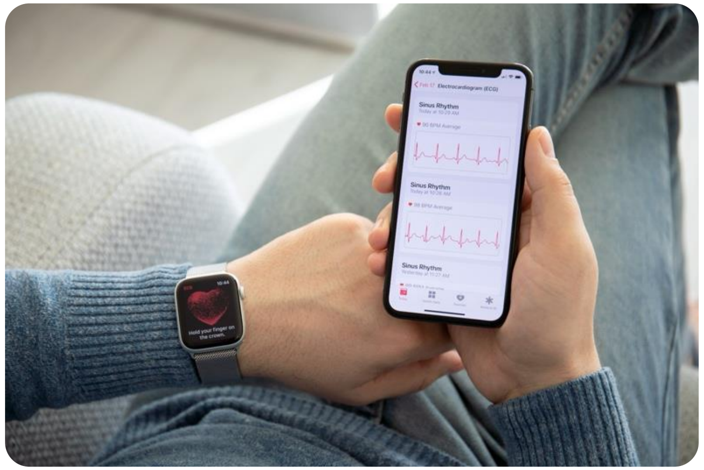
Wearables

Wearables are moving from step counting toward heart rate variability, recovery and sleep metrics.



88%

increase in spending on Fitness Trackers in 2025

75%

of total fitness tracker revenue came from smart rings

Subscriptions

Subscription-based platforms such as Oura Ring 5 and Whoop 5.0 have driven the biometric-tracking niche

Sources: Circana; company announcements; Coresight Research.

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OPPORTUNITY 2 · SERVICES

Longevity: Brain Health Lab

<5 min
Full assessment tracking eye movement.

90%
Consistency with MoCA, the clinical standard

83%
Faster than traditional methods

QuickMind

- **91%** patient adherence in VR rehab
- **~20%** cognitive improvement vs. control at 6 months

In house services geared toward cognitive health

Source: YIWEI Medical / QuickMind VR-EMCA clinical documentation; Coresight Research.

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OPPORTUNITY 2 · SERVICES

Coffee Anyone?

Your highest-value emerging customer is out of the house more than others – how do you capture those trips?

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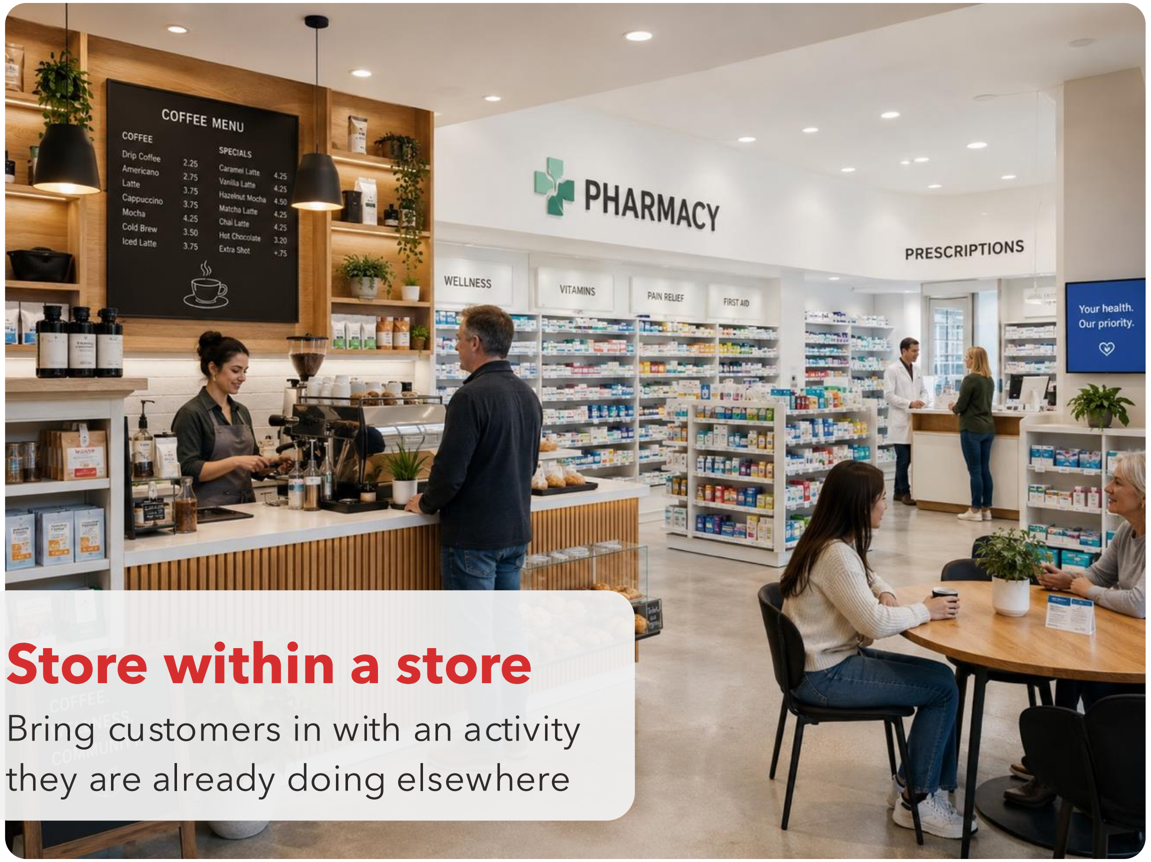

Store within a store

Bring customers in with an activity they are already doing elsewhere

49%

of GLP-1 users went to a coffee shop in the past two weeks vs 36% of all consumers

22%

GLP-1 users drinking more coffee since starting **(Millennials: 38%)**

41%

GLP-1 users are consuming more protein bars and shakes

Base: 803 US respondents aged 18+, 2026. Source: Coresight Research

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Turbo Charge the Use of the Data You Already Own

- Buying Behavior
- Anonymized RX Data
- Health Outcome Data
- Customer Demographics

Turbo Charge Your Analytics Engine

UDig

Empower your Pharmacist, marketing programs, store associates, Retail Media, etc…

- Longevity - Beauty
- Wearables
- Services

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THE ENABLING LAYER

AI Enables The Three Opportunities

Strongest in products and marketing. Most tentative in services – and being explicit about where the line sits is what makes the rest credible.

1 PRODUCTS

Demand forecasting. ~95% accuracy claimed. The direct fix for empty facings.

Shelf intelligence. Computer vision and robotics – physical AI in your aisle.

Planogram optimization. Store-level plans, not a national template.

2 SERVICES

What Works:
Coaching, wellness, advice. Answer questions, route to the right expert.

The near-term win isn't new tech. The recommendation engines already exist, but are unused.

3 MARKETING

Unified customer profile. CRM, loyalty, app and store data in one place.

Decisioning. Optimal offer, channel and timing, per customer.

Measure outcomes, not sales. Vision on cameras you already have.

T Mobile

Sources: Coresight Research; vendor-reported performance; prior Coresight client work.

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SYNTHESIS

What You Can Do Today

THE NEW PHARMACY

Automated filling
The pharmacist is moved to the floor.

Consultation space
Test to treat and paid services.

Personalized Marketing
Make sure customers know the offering.

THE FRONT OF STORE

Organized by condition and life stage
Diabetes, gut health, women's health, GLP-1 support.

Store-in-store
Coffee shops & other incentives will get customers through the store.

Product partnerships
Getting the products customers are buying into store displays

BUILDING THE FOUNDATION

Connected health as a consultative sale
Devices, subscriptions, product consultations.

Build a deep online catalogue
Enable returns in-store - Instant credit.

AI enablement.
Forecasting, shelf intelligence, personalization, next best action.

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Takeaways for the room

Retail health is being redefined - winning it takes product, services and marketing moving together, with **AI as the connective layer**

01 **Wellness stopped being just a lifestyle. It became longevity.** – $1.14T opportunity

02 **Know your different customers** Boomers and wellness, Gen Z and Beauty

03 **Three pillars connected by AI** Products, services, marketing, highlighted by the Pharmacist as an in-store resource

04 **Up next in the panel:** Hear how this plays out across retail, CPG, pharma and technology – including T-Mobile's view on the manufacturing/supply-chain layer

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THANK YOU

Questions?
Answers.

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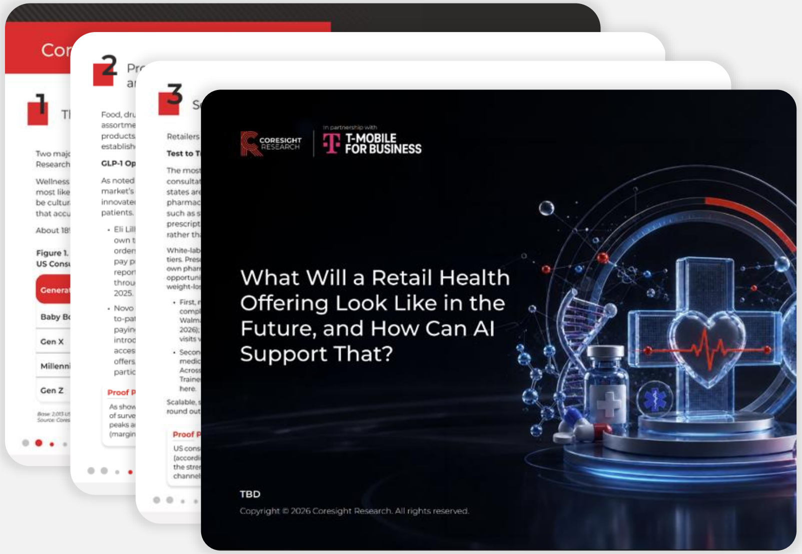

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PANEL
What Will a Retail Health Store Look Like in the Future?

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THANK YOU

Questions?
Answers.

Q&A

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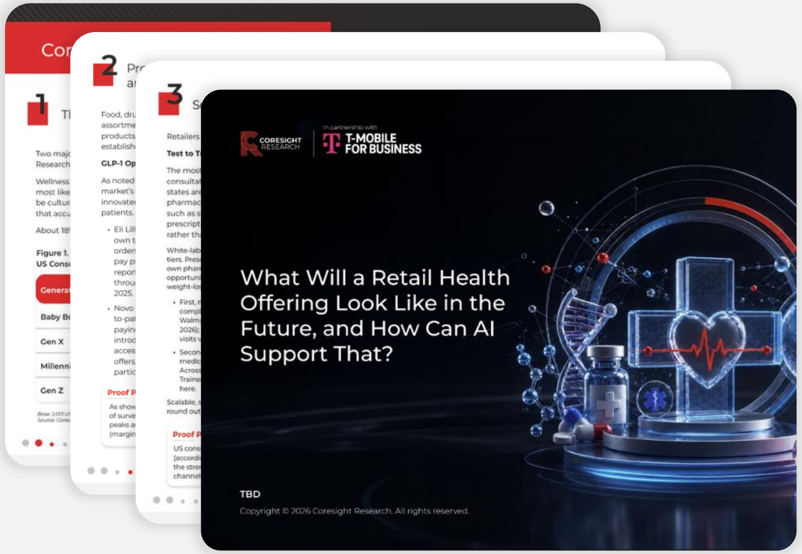

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