

# State of the Consumer: GLP-1s

## April 2026

GLP-1s are compressing consumption and raising the bar for every decision—**shifting spend** from impulse-driven habits to intentional, **high-value choices**.

This month's report maps where categories are under pressure and where brands can win.

### What This Means For Brands

- 1 Own the Essential Meal**  
Win fewer, more intentional meals by delivering clear functional value
- 2 Be a Transition Partner**  
Capture high-value spend during rapid identity change and transition moments
- 3 Be the Experience for New Confidence**  
Enable consumers to show up, participate and be seen
- 4 Be THE treat, not just a treat.**  
Make indulgence feel earned through higher flavor payoff in fewer occasions

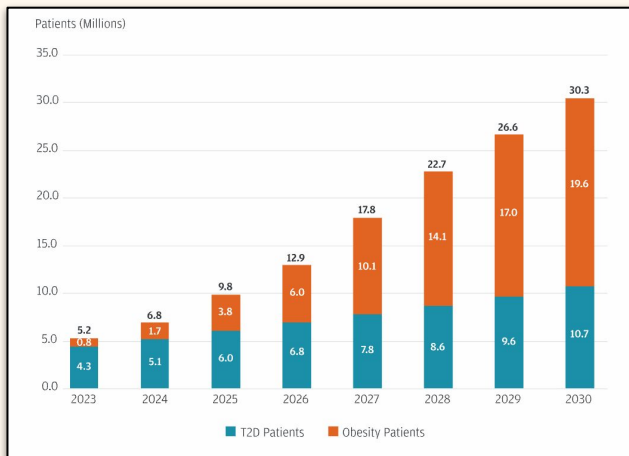
**WIN WHAT MATTERS MOST**

# Exponential Growth Forecasted Over Next 5 Years

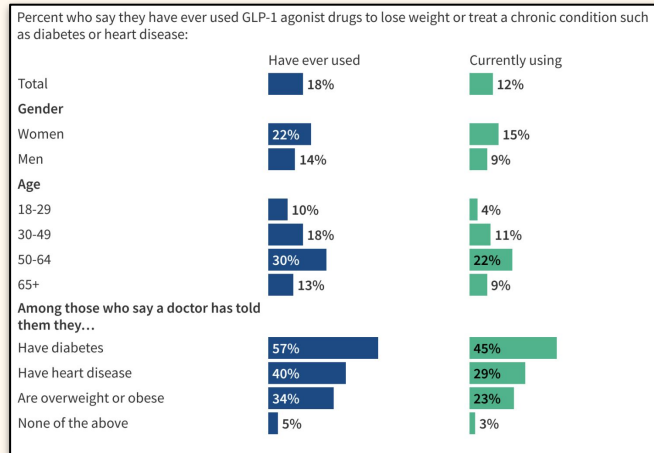
The launch of generics and oral pills will accelerate consumers on GLP-1s to over 30MM Americans by 2030, an 18% CAGR.

Today, GLP-1 users are predominantly female, older, and have a medical condition that triggered usage.

## GLP-1 usage to accelerate significantly in 10 years



## Early adopters lean female and aged 50-64



# GLP-1s Are Scaling Into A Massive Behavioral Shift

GLP-1 adoption is accelerating rapidly, with projections exceeding 30MM Americans by 2030—moving beyond niche medical use into mainstream behavior.

GLP-1s are compressing behavioral change into months, not years

## This Isn't Just Weight Loss - It's Behavior Change

Appetite  
Suppression



Eating Occasions  
Decline

Reduced 'Food  
Noise'



Impulse Consumption  
Declines

Rapid  
Transformation



Identity  
Reset

### Immediate Category Signals

- Food spend declining
- Dining frequency under pressure
- Spend shifting to identity + experience

***This shift is large enough to reshape how consumers spend across food, retail and experience categories.***

# GLP-1s Raise the Bar for Every Eating Occasion

GLP-1s are reducing eating frequency and suppressing impulse-driven consumption, forcing every food decision to justify itself on satiety, quality, or reward.

## Early Impact on Consumption Behavior

Behavior is already shifting meaningfully, with consumption likely stabilizing at a lower, more intentional baseline.

### Consumption Compressing Across the Board



**-21%**  
Annual caloric intake

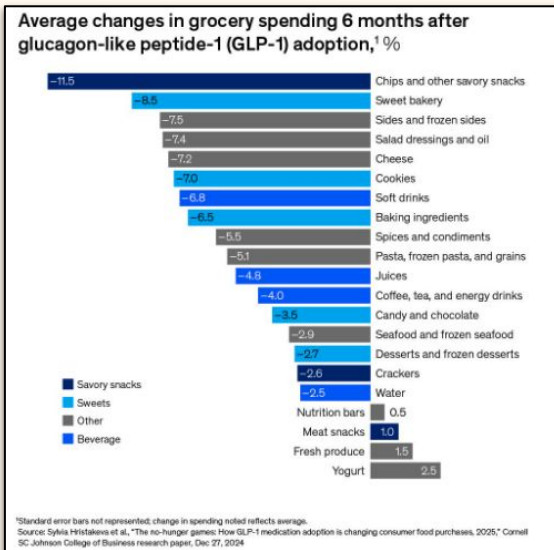


**-31%**  
Monthly Grocery Spend



**-34%**  
Dining Frequency

## Where the Pressure Hits



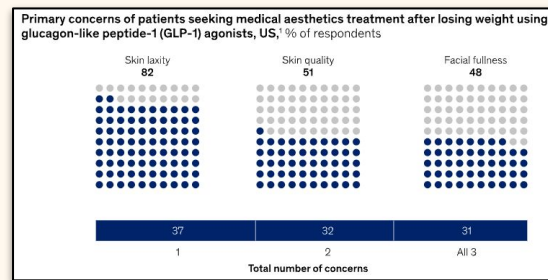
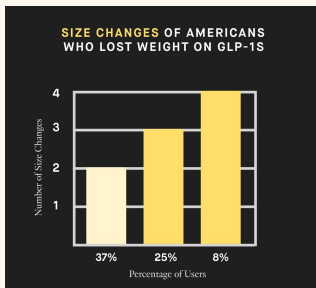
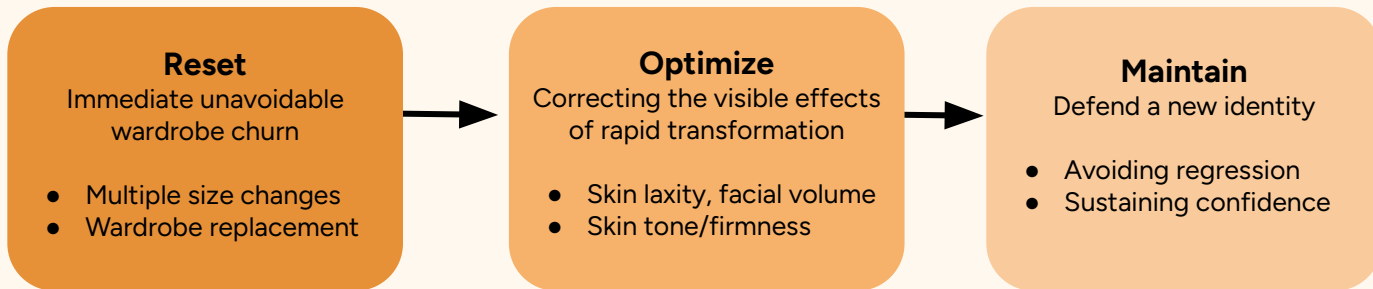
***Impulse consumption is declining;  
core needs are being reallocated toward higher-value choices.***

# From Weight Loss to Identity Rebuild

Rapid weight loss is triggering an identity reset, forcing consumers to update how they look, dress, and present themselves.

This creates a surge of high-priority spend—starting with immediate wardrobe replacement and extending into targeted appearance correction and maintenance.

## 52% Positive Body Image: The Catalyst for Identity Rebuild



**Transformation creates a narrow window where identity-driven spend spikes. Brands that show up early win disproportionately.**

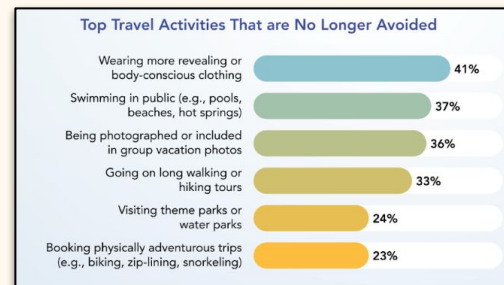
# Confidence Re-Engages Consumers in High-Visibility Moments

GLP-1 driven transformation is reducing self-consciousness and unlocking a return to social, public-facing, and appearance relevant behaviors.

As confidence rises, consumers re-enter moments they previously avoided - redirecting spend toward being seen, not just consuming.



**One Expression: Travel as Reward**  
58% of GLP-1 Users have taken a trip after beginning treatment, as a reward for progress on their transformation



**Spend is shifting from private consumption to public expression**

# What's it all mean? What do we do?

*As habits change, feed consumers in both functional and emotional ways.*

01

## Own the Essential Meal

GLP-1s compress eating occasions, concentrating demand into fewer, more intentional meals where every choice must deliver clear value.

**Winning brands will anchor themselves in these high-stakes occasions by delivering satiety, nutritional credibility, and reliable satisfaction. If you are not core to the meal, you risk being eliminated entirely.**

## Functional Food Focus

Be the brand that earns a place in the meals that remain

02

## Be the Transition Partner

Rapid physical change is driving an ongoing identity reset, creating demand for products and services that help consumers adapt to and sustain their new self-image.

**Growth will come from supporting key transition moments—not just selling products, but reinforcing progress, confidence, and continuity in a consumer's transformation journey.**

## Support Transformation

Be the brand that shows up when identity is in motion

03

## Be the Experience for New Confidence

Improved self-perception is unlocking greater social participation, as consumers re-enter public, social and experiential moments they previously avoided.

**Brands should position themselves as enablers of enable re-engagement, creating experiences that help consumers show up, be seen and express their new confidence.**

## Enable Participation

Be the brand that helps consumers show up and be seen

04

## Be THE Treat, not Just a Treat

Indulgence doesn't disappear—it becomes more deliberate, less frequent, and held to a higher standard of reward.

**Brands must shift from everyday indulgence to earned moments, delivering concentrated satisfaction in formats that justify the choice—through taste, quality, or experience.**

## Earned Indulgence

Be the brand that makes indulgence feel worth choosing