The Unexpected Ways GLP-1s Are Transforming Consumer Behavior

August 2026

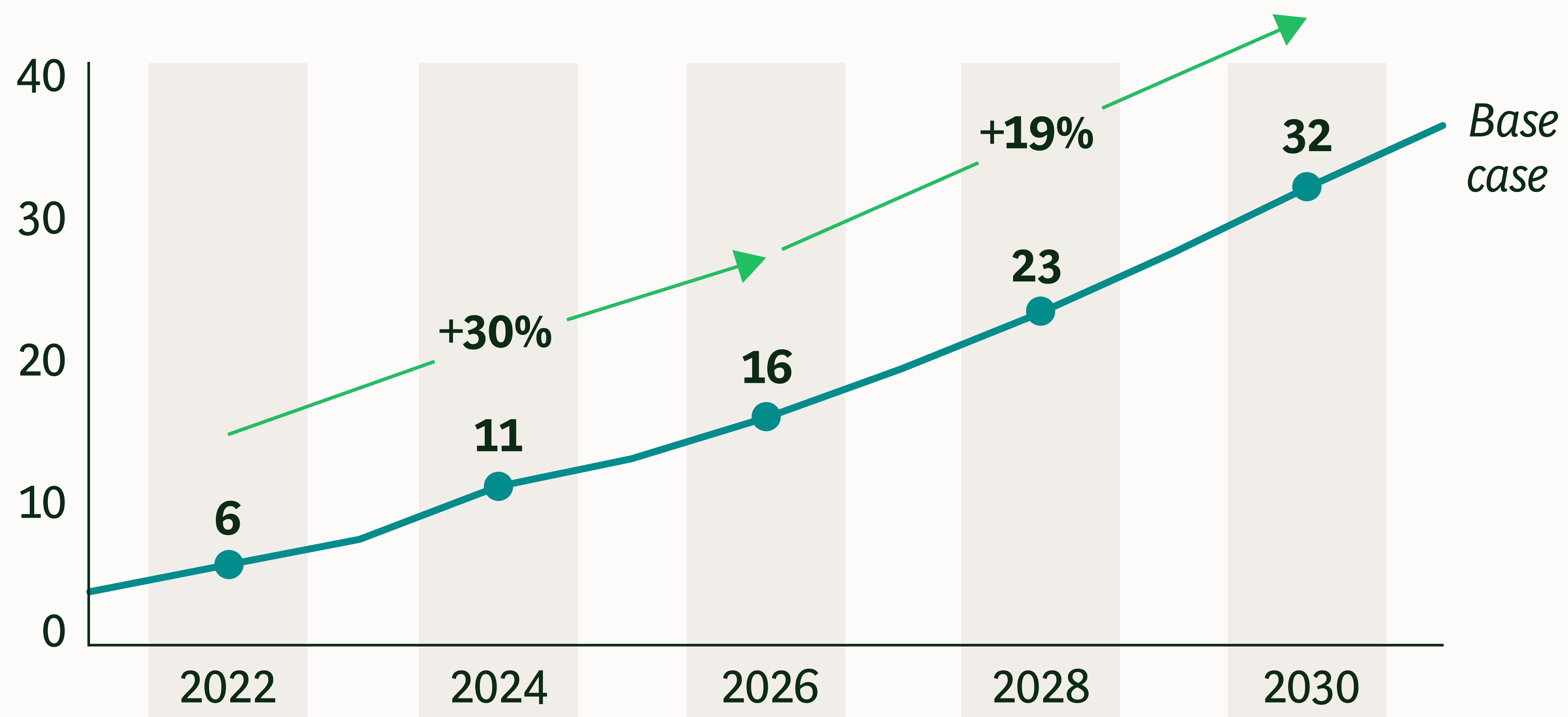
The GLP-1 wave has evolved into multiple formats, indicators, and channels

	Before 2021	2021	2022–2023	2024	2025	2026
Format	GLP-1 approved in 2014 for obesity; Ozempic launched in 2017; oral Rybelsus in 2019	Wegovy approved for obesity	Tirzepatide enters through Zepbound	Compounding begins to fill supply gaps	Oral semaglutide approved for obesity	Lilly launches oral Foundayo
Indications	Type 2 diabetes and some obesity	More GLP-1s expand to cover obesity	Additional competition in obesity	First approval for sleep apnea; Wegovy broadens into MASH and cardiovascular	Use for obesity-adjacent conditions takes off	Category spans type 2 diabetes, cardiovascular risk, obesity, sleep apnea, and MASH
Access	Through payer and retail pharmacy	Access remains largely through pharmacies	Cash payment begins to emerge as a viable option	Lilly opens a direct fulfillment digital platform; employer coverage grows	Broader telehealth and pharmacy benefit manager collaboration expands access	Medicare bridge expected to begin, expanding access

Source: BCG analysis.
Note: MASH = metabolic dysfunction-associated steatohepatitis.

The US user base tripled since 2022 and will likely double by 2030

NUMBER OF US GLP-1 USERS (MILLIONS)



USER TYPE (MILLIONS)	2022	2024	2026	2028	2030
New	**2.7**	**5.2**	**5.2**	**7**	**8.9**
Lapsed	**0.7**	**1.3**	**2**	**2.8**	**3.7**
Stopped	**0.2**	**0.4**	**0.8**	**1.3**	**1.9**
Restarted	**0.1**	**0.3**	**0.7**	**1.2**	**1.9**

GLP-1 USER STATUS (% OF US ADULT POPULATION)

	2026	2030
Active	6%	12%
+ **Lapsed**	3%	8%
= **Active and lapsed**	9%	20%

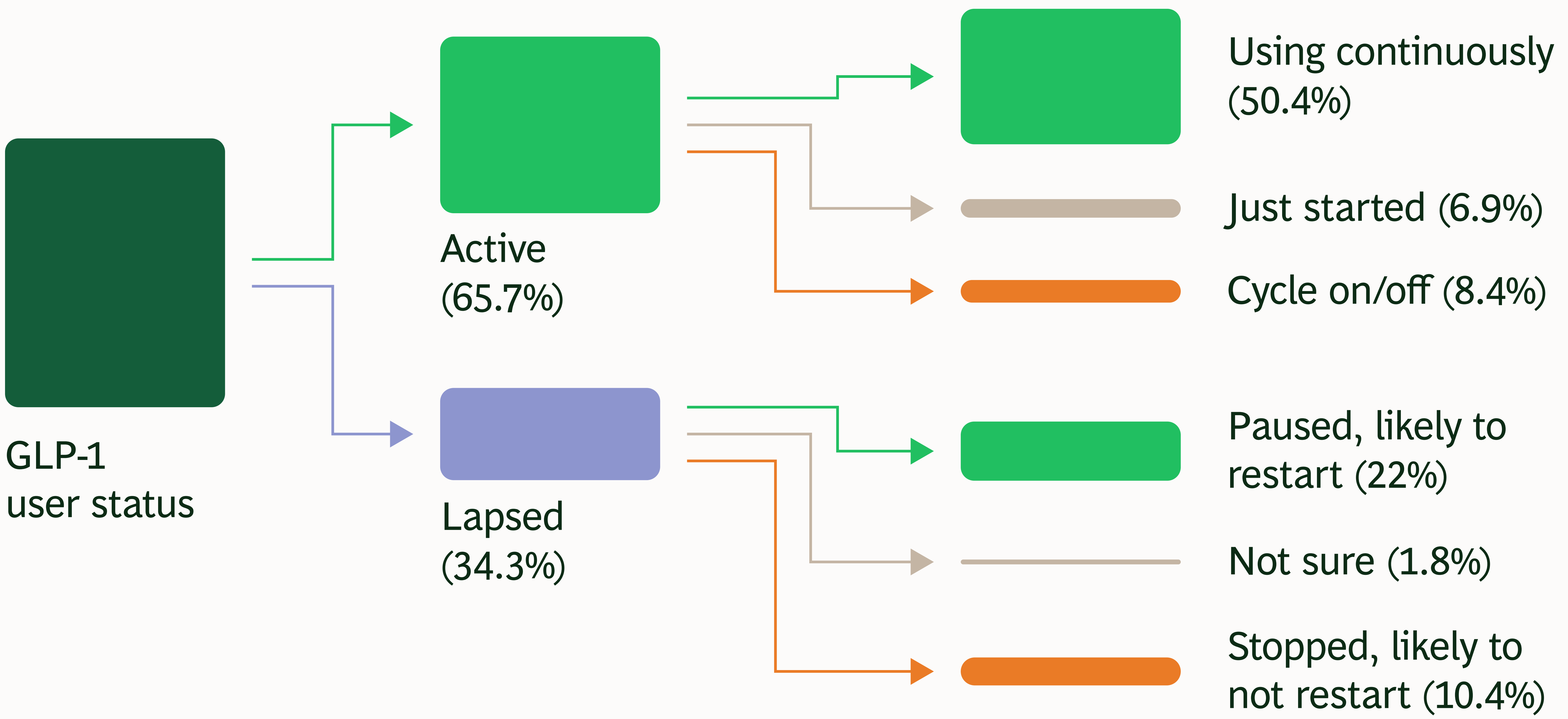
Base case assumes:

- **Continued reimbursement expansion**, such as Medicare coverage for obesity starting in 2026, and deepening commercial coverage via employer plans and fewer restrictions
- **Increased uptake in covered populations** due to physician adoption, consumer acceptance, lower out-of-pocket cost, and side-effect management
- **Expansion into new segments via new formats**, such as orals and lower-cost injectables, with no major supply constraints

Sources: BCG GLP-1 Supplemental Survey, April 2026 (N=1882); Clarivate (prescription data); US Census; Lilly Investor Relations; EvaluatePharma (pharmaceutical market forecasts); BCG analysis.
Note: Adoption trends can fluctuate as more studies and data become available and health economics change. Active users are triangulated via sales data, scripts data, and BCG survey data.

GLP-1 adherence varies; many users pause or cycle on and off

~80% of the US has not used a GLP-1



Key insights

Most GLP-1 users plan to continue for the foreseeable future

Continuous users are twice as likely to be at a maintenance dose

Users still increasing their dosage are less certain whether they'll stay on GLP-1s long-term

10%+ of users cycle on and off

One-third of users are lapsed

Two-thirds of lapsed users plan to restart

Sources: BCG GLP-1 Supplemental Survey, April 2026 (overall; weighted, N=1882); BCG analysis.
Note: Values represent share of each user type, not share of total population; among US adults age 18–70.

Four purchase archetypes are forming among GLP-1 users

Lifestyle optimization

GLP-1s are a central part of a broader focus on self-improvement; users build habits such as physical fitness and other wellness routines

41%

Aesthetic transformation

Users in this group are most likely to purchase medical aesthetics and wellness goods and services. GLP-1s are a focal point for beauty transformation

19%

Disease management

Purchases center around managing the day-to-day realities of GLP-1 use, whether it is related to their medical conditions or the drug's side effects

27%

All-in on GLP-1s

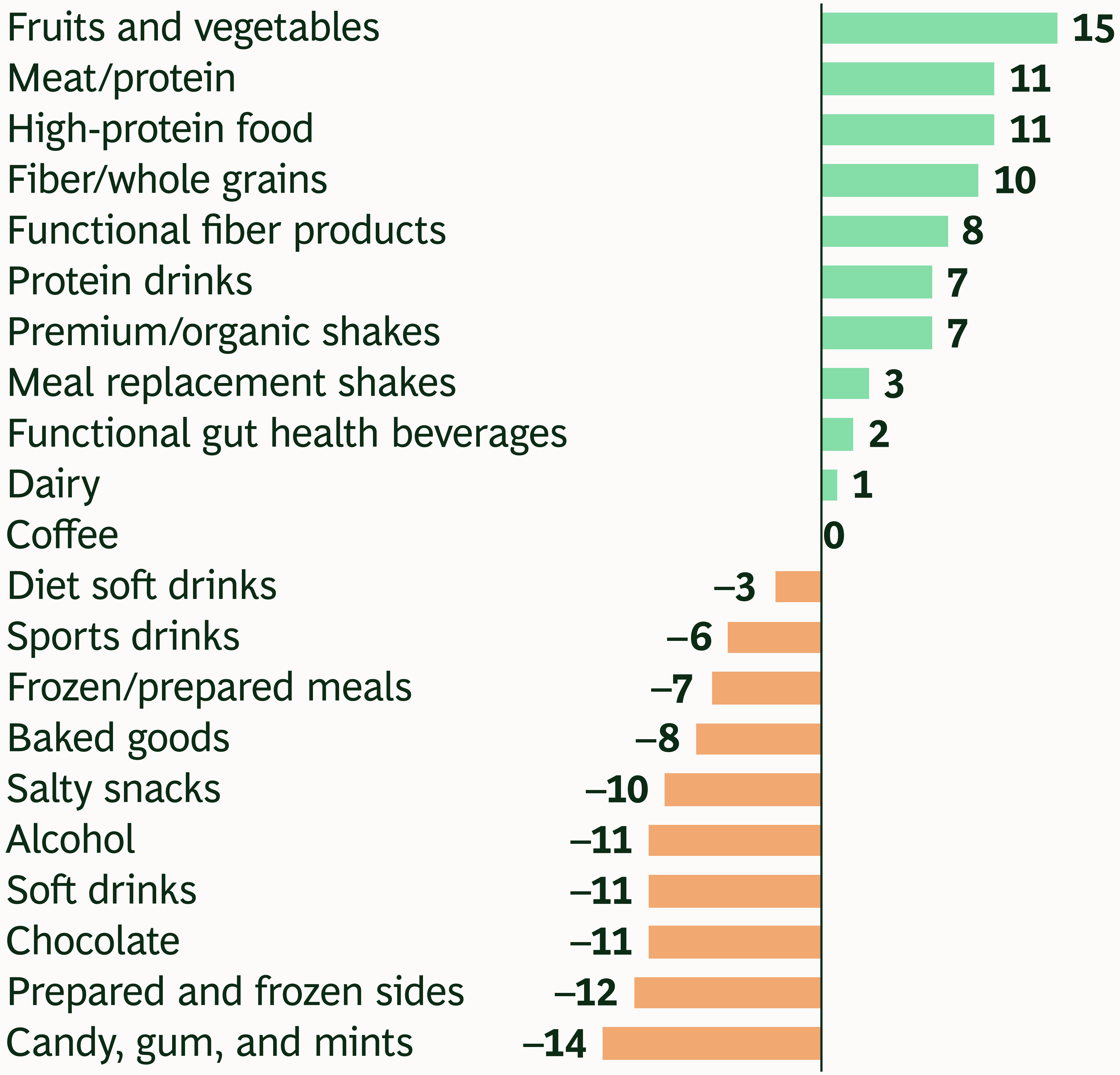
Rather than favoring one path, some users follow all of them. They are transforming their entire health and wellness life around GLP-1s

13%

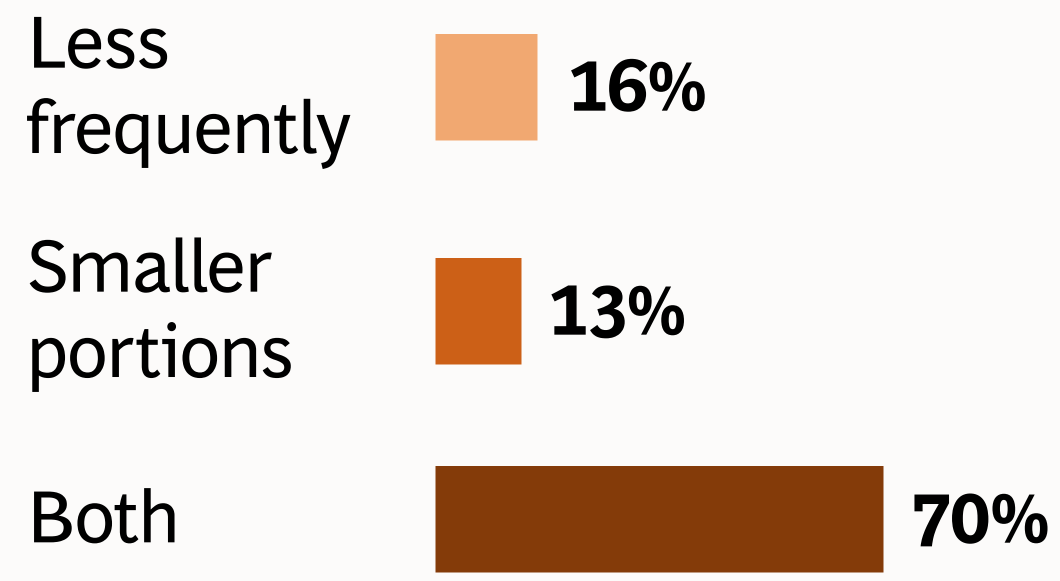
Sources: BCG GLP-1 Supplemental Survey, April 2026 (N=1882); BCG analysis.
Note: Purchase archetypes are based on purchase behavior among all active users.

Food spending shifts towards fresh, protein, fiber, and other functional formats

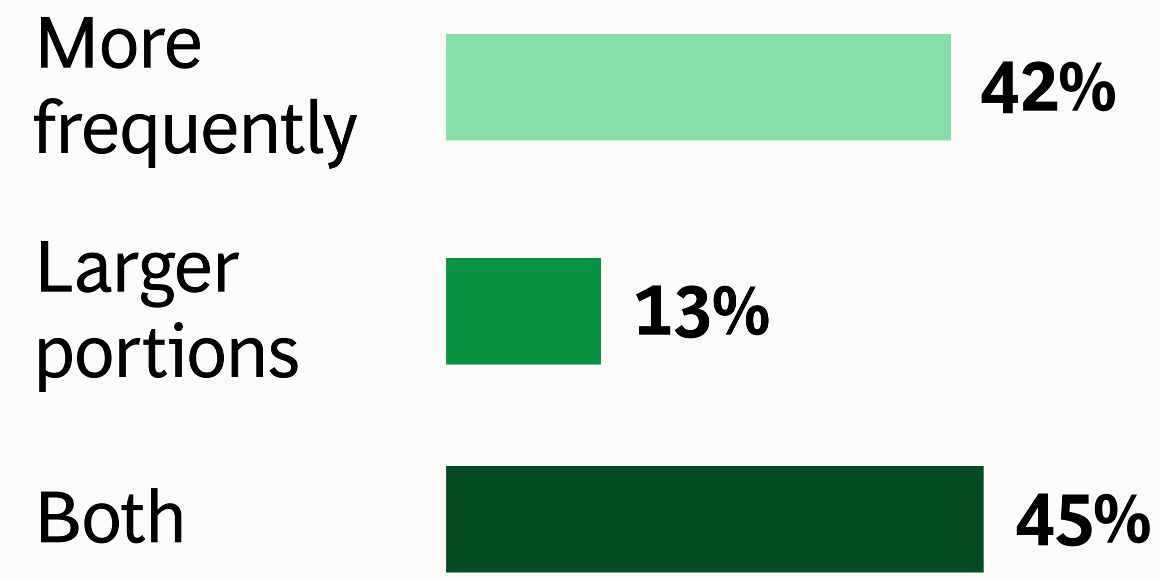
AVERAGE SHIFT IN SPENDING BY ACTIVE USERS SINCE STARTING MEDICATION (%)



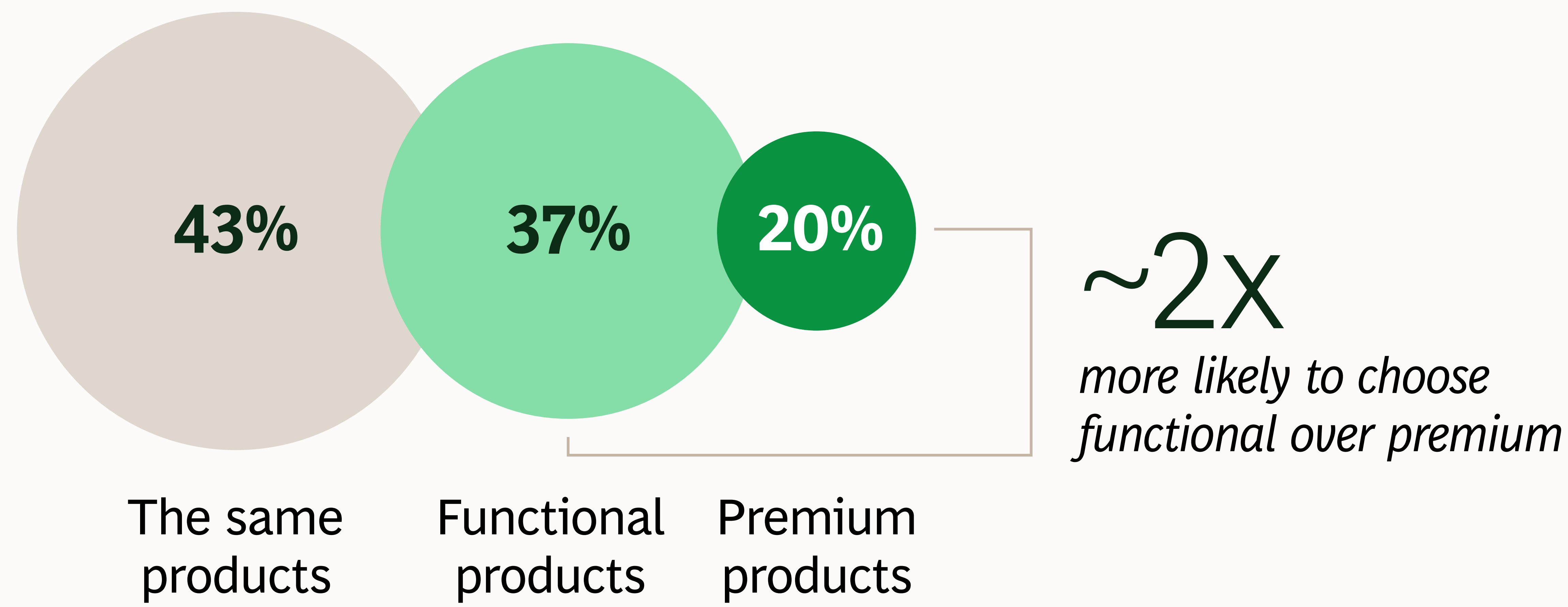
In reduced categories, such as salty snacks and alcohol, I am eating…



In increased categories, like fruits and vegetables, I am eating…



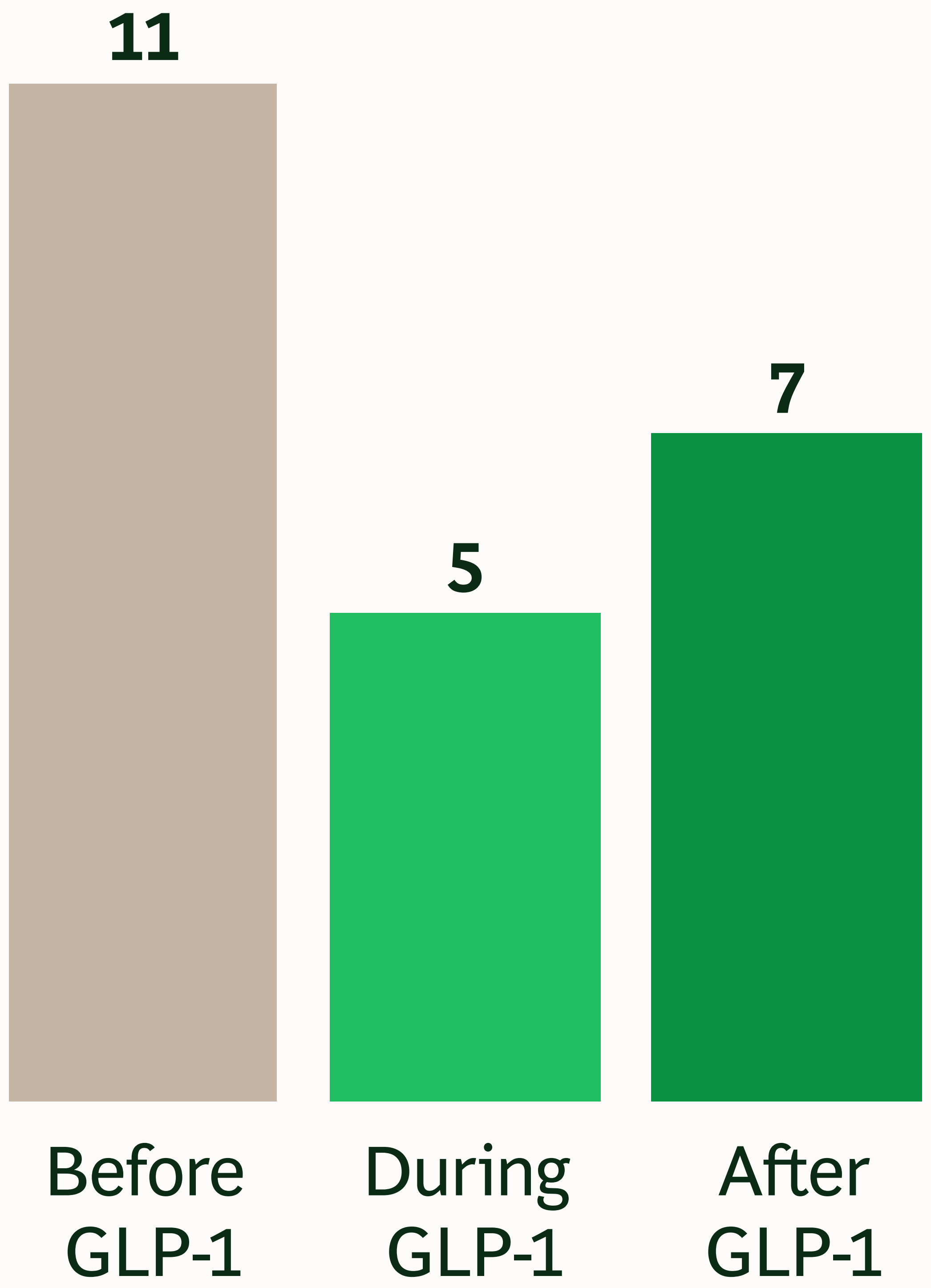
GLP-1 users are buying…



Sources: BCG GLP-1 Supplemental Survey, April 2026 (N=1882); BCG analysis.

Lapsed GLP-1 users resume eating out, but not as often as before

Monthly dining away from home occasions[1]



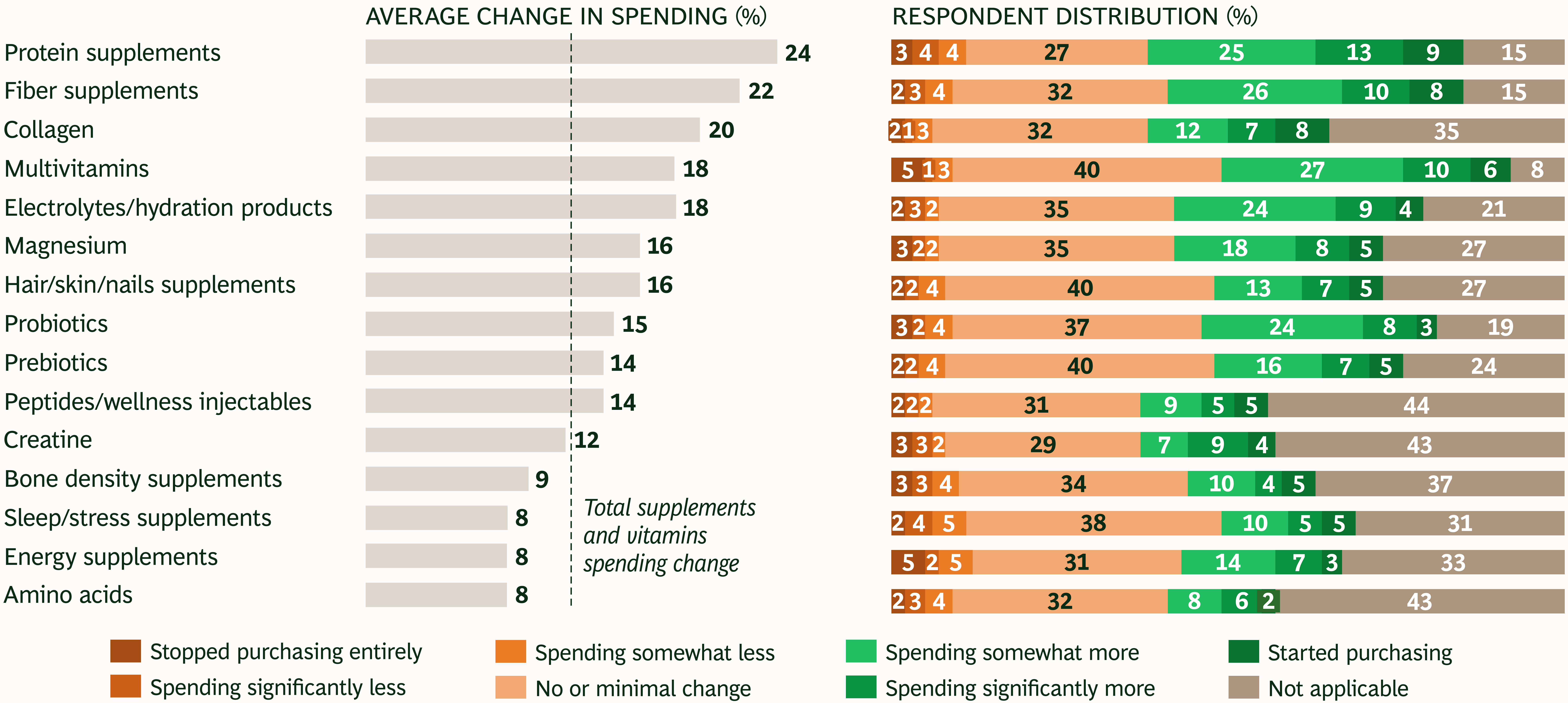
Change in spending among active GLP users

	Cafes	Fine dining	Casual dining	Fast casual	Quick service
Initial spending decline[2]	5%–10%	5%–10%	10%–15%	15%–20%	20%
Post-GLP-1 spending rebound	3%–7%	3%–7%	5%–10%	15%	10%–15%

Sources: BCG GLP-1 Supplemental Survey, April 2026 (N=1882), restaurant and food away from home (n=147); BCG analysis.
Note: Impact on purchasing behavior reflects the average change based on weighted responses across Increase, Decrease, and No change in spending.
[1]Responses are self-reported, so data may overstate the magnitude of actual change.
[2]Calculated as contributions towards "food away from home" category spend impact.

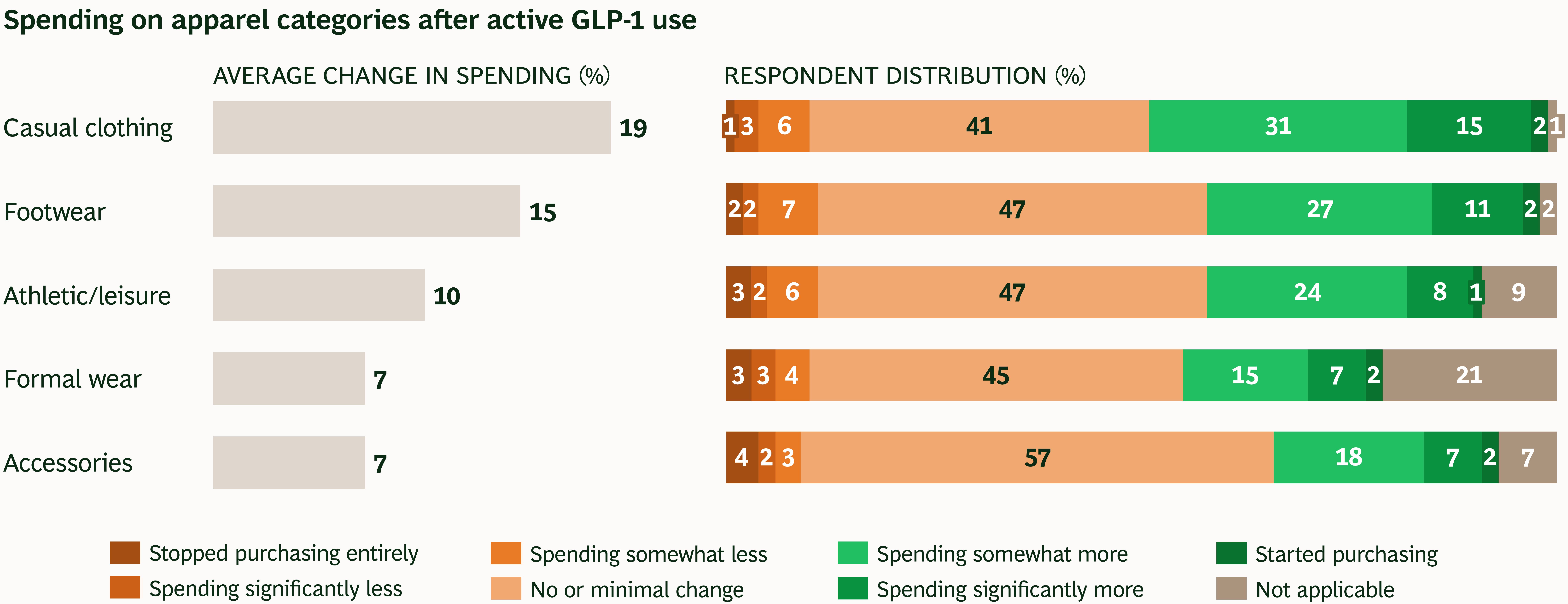
Protein, fiber, collagen supplements show highest spending growth

Spending on supplement and vitamin categories before and after active GLP-1 use



Sources: BCG GLP-1 Supplemental Survey, April 2026 (N=1882), supplement users (n=184); BCG analysis.
Note: Impact on purchasing behavior reflects average change based on weighted responses across Increase, Decrease, and No change in spending.

Casual clothing and footwear gain most from apparel spending shifts



Sources: BCG GLP-1 Supplemental Survey, April 2026 (N=1882); BCG analysis.
Note: Impact on purchasing behavior reflects average change based on weighted responses among GLP-1 users reporting Increase, Decrease, and No change in spending.

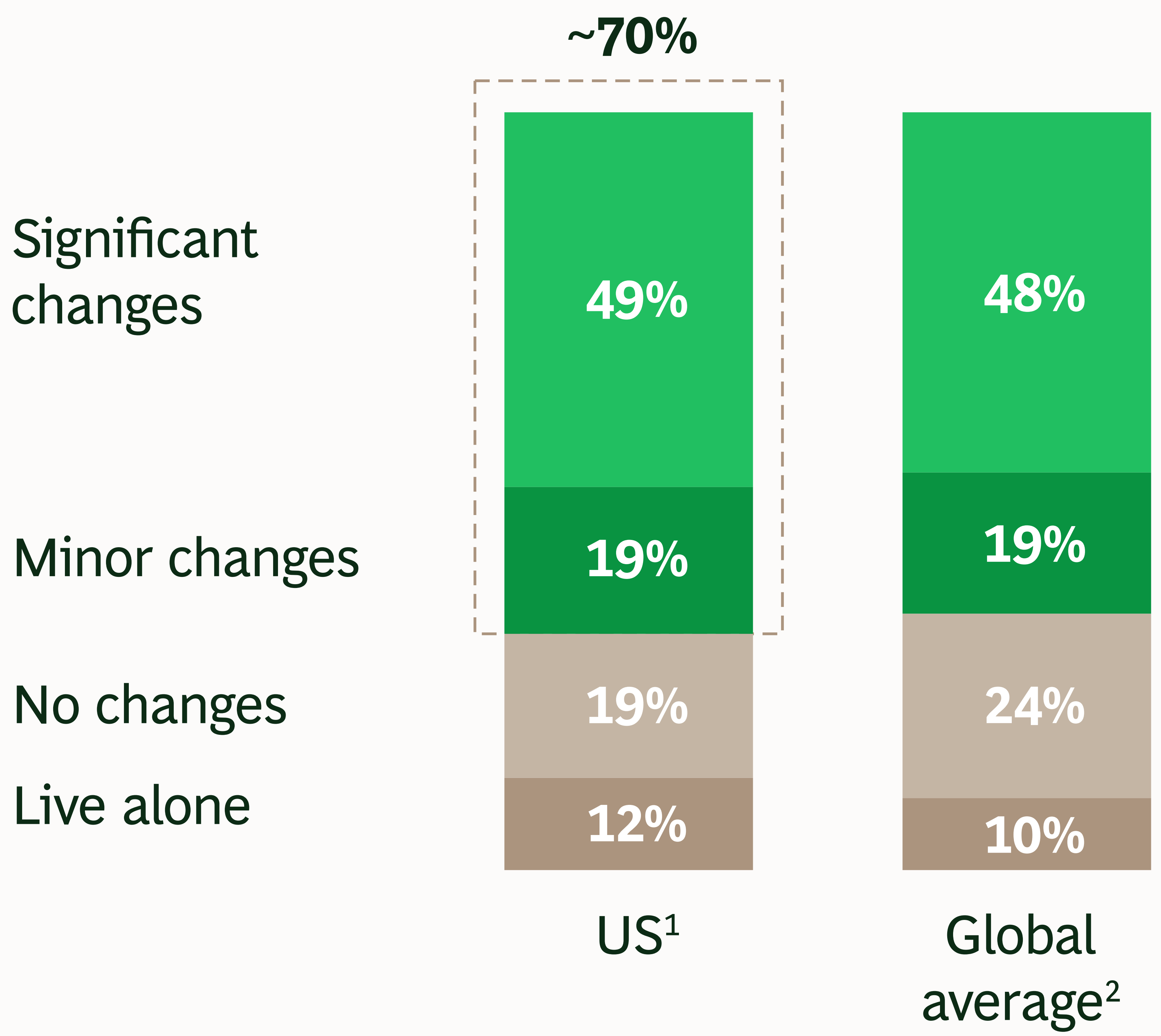
Four patterns predict food consumption shifts before, during, and after GLP-1 use

Change in consumption frequency (Before / During / After)	Food categories
Rebounders Frequency returns to baseline after GLP-1 use	Frozen meals, Salty snacks, Frozen side, Alcohol, Chocolate, Diet soft drinks, Soft drinks, Candy, gum, and mints, Coffee, Baked goods
Sustained growers Frequency rises during usage and accelerates after	Meat/protein, Fruits and vegetables, High protein foods (e.g. yogurt)
Temporary growers Frequency peaks during usage, then returns to baseline	Protein drinks, Functional fiber products, Premium/ organic foods, Functional gut health beverages, Fiber/ whole grains, Meal replacement shakes
Sustained decliners Frequency decreases during usage and continues to decline after use	Sports drinks, Dairy

Sources: BCG GLP-1 Supplemental Survey, April 2026 (N=1882); BCG analysis.

Consumption changes affect entire households, greatly expanding the market beyond active GLP-1 users

Have others in your household changed what they eat or drink as a result of your GLP-1 use?



GLP-1 user behavior	Changes in household habits	Similarity index (out of 100)
↑	Making healthier food choices	46%
↑	Fruit and vegetables consumed	44%
↓	Fast food/take out consumption	43%
↑	Protein consumed	42%
↓	Junk food eaten at home	41%
↓	Portion sizes at mealtimes	41%
↓	Frequency of drinking alcohol	38%
↓	Snack frequency	38%

Sources: Global Consumer Radar, 2026 (sample size varies by country); BCG analysis.
Note: No material differences reported between male and female respondents.
[1]US user survey respondents (n=130).
[2]Global user survey respondents (N=611).

Four moves consumer companies should make now

Reframe the portfolio toward function

- Accelerate protein, fiber, gut-health, and portion-right products
- Selectively invest in premium offerings
- Rationalize exposure in rebounding categories, such as salty snacks, alcohol, and soft drinks

Plan for the household, not the patient

- Pack sizes, claims, and shopper marketing should reflect a broader household demand shift
- Broaden the target market: 16 million active users translates to 24 million when considering household spillover

Build for the lapsed-users cohort

- Wellness, supplements, aesthetics, and apparel should expect post-lapse stickiness
- Opportunity in navigating unique needs during on- and off-ramp periods

Pressure-test 2030 scenarios

- Test the 2030 market at multiples of around twice today's category impact
- Pre-position pricing, innovation, and production capacity

Source: BCG analysis.