



Decoding the DNA of weight loss drugs (GLP-1s)

How appetite drugs are redefining consumer choice



BRAND GENETICS

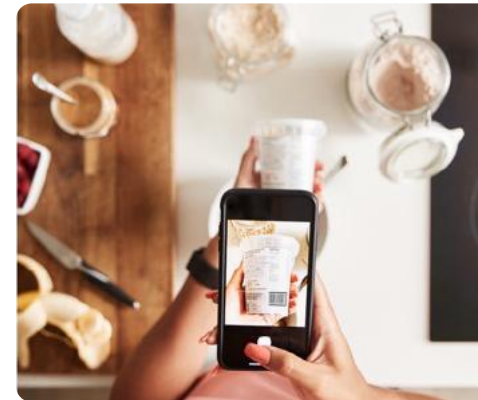
GLP-1s are having a **profound impact** on consumers' day-to-day...



High-income households with at least one GLP-1 user **reduce grocery spending by 8.6%** within six months of adoption²



GLP-1 users consume **15-40% fewer calories** (vs placebo)¹



On average, Mounjaro users **lose 15% of their weight** over 18 months (vs. 3.1% placebo)³

This impact will
only increase

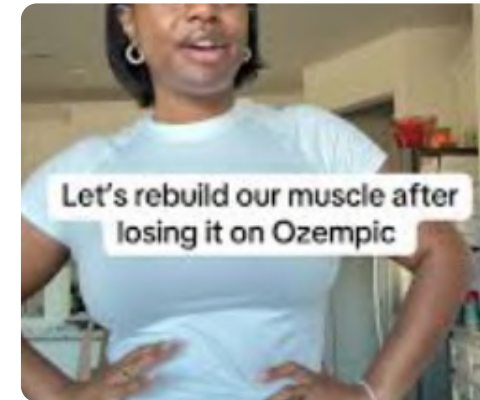
By 2030 it is
estimated that
GLP-1s will...



Have
30-70 million
global users⁴



Be used by **9% of**
the US
population⁴



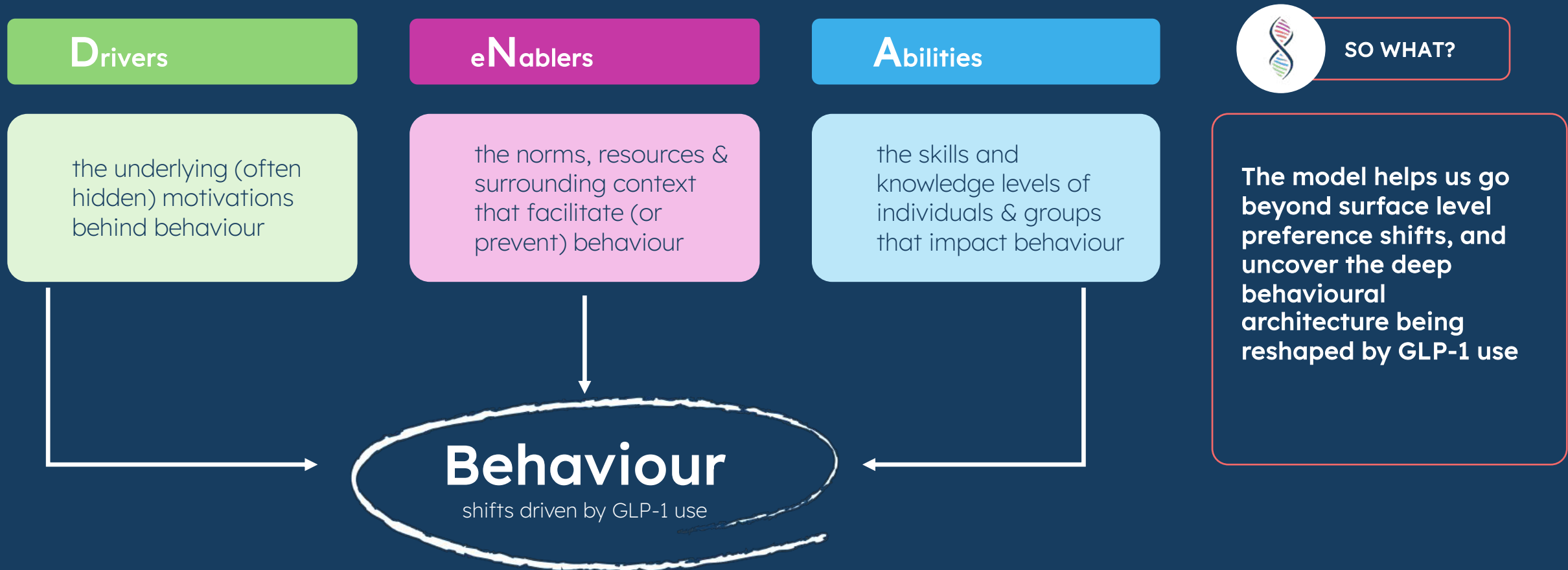
Be a global market
worth \$100bn
(vs \$10bn in 2025)⁴

GLP-1s will disrupt not only **what** people eat, but **why** and **how**. To understand how to win in the next era of demand we need to look at this shift through a **behavioural lens.**



At Brand Genetics
we are human
behaviour
decoders

Our DNA model is a science-backed, evidence-based model that reveals how the drivers, enablers and abilities **shape behaviour**



We commissioned our own research and **applied our DNA framework** to get to the heart of how GLP-1s are shifting consumer behaviour



97

AI-led qual interviews



12

1hr human to human IDIs



109

Current & Lapsed users engaged

20

Scientific studies reviewed



3

Markets Researched (UK, USA, BR)



172

Key quotes collected



Our DNA model enables us to **decode how GLP-1 is impacting behaviour**

Drivers

What are the **underlying (often hidden) motivations** behind the behaviour?

Empowerment: I want to feel in control and not ruled by my cravings

Status: I want to build my confidence and transform my identity

Security: I want to avoid illness and gain physical resilience

eNablers

What's the norms, resources & context that **facilitate (or prevent)** behaviour?

New tension points:
Normal routines bring new challenges

Dissolving social stigma:
Cultural attitudes to weight-loss drugs are changing

Accelerated access:
Despite affordability concerns, uptake is growing across the globe

Abilities

How do individuals' **skills and knowledge levels** impact their behaviour?

Bypassing willpower:
Suppression is not a choice, it's biology

Increased side effects:
How people experience food, flavour & texture is altered

Nutritional scrutiny: A change in the way people shop & evaluate nutrition



SO WHAT?

The DNA model doesn't just tell us what's happening. It tells us why, and how we can respond. It reveals that GLP-1s are not a passing health trend — but a rewiring of people's drivers, enablers and abilities.

Drivers

“

*Food noise for me was the **constant thinking about food**. Having breakfast and already thinking about the evening meal. When you take GLP-1, this is silenced, and it is bliss. **It's just so freeing.***

Female, 40, UK

D

DRIVERS

Empowerment: I want to feel in control and not ruled by my cravings

Status: I want to build my confidence and transform my identity

Security: I want to avoid illness and gain physical resilience



SO WHAT?

Looking at the hidden drivers showcases how this is not just about weight management, but the desire to feel in control. Food stops being a battleground and becomes a manageable task

“

*I find it **difficult when going out to eat**. Often, I can't finish half of the portion, then you feel guilty when the waiter asks if anything was wrong. I used to be vague and say I'm on medication but **now GLP-1s are less taboo**.*

Male, 39, USA

N

ENABLERS

New tension points: Normal routines bring new challenges

Dissolving social stigma: Cultural attitudes to weight-loss drugs are changing

Accelerated access: Despite affordability concerns, uptake is growing across the globe



SO WHAT?

Cultural attitudes are shifting fast. GLP-1 use is moving from taboo to smart, socially validated and widely available. We must tailor our portfolios and design our products to support new needs and overcome points of tension

Abilities

“

*I don't want to eat the fatty foods; I just don't fancy it. It's so funny, **the best thing in the world right now is a crunchy salad**, it just hits the spot. It's light, it's refreshing, and I know it's **not going to sit on my tummy and make me feel full or sick.***

Female, 32, UK

A

ABILITIES

Bypassing willpower: Suppression is not a choice, it's biology

Increased side effects: How people experience food, flavour & texture is altered

Nutritional scrutiny: A change in the way people shop & evaluate nutrition



SO WHAT?

Categories traditionally driven by impulse, quantity, and indulgence are likely to experience volume erosion. Products must now be designed for tolerability and nutritional density as much as taste

The DNA analysis highlights **5 key takeouts** for any insight or brand leader

01

Consumption norms are being re-wired

GLP-1 drugs suppress appetite and cravings at the neurological level. This means **demand for food, drink, and alcohol is structurally shifting** not because people want less, but because **they physically need and desire less**

02

Indulgence is out. Satiety & self-control is in

Traditional marketing narratives built on **cravings, comfort, and 'treat yourself' risk falling flat** in a world where reward circuits are dulled. The shift may also reframe the whole narrative - even for those not using GLP-1

03

Identity transformation is the new journey

GLP-1 users aren't just losing weight - they're rebuilding their social identity, relationships with their bodies, and place in the world. From re-entering fashion to restarting fitness, **they're in reinvention mode**

04

Size isn't everything. Quality counts

Whether it's food, fashion, or skincare—**GLP-1 users don't just want less, they want better.** They're looking for smaller portions but expect greater functionality, pleasure, or meaning in what they choose

05

Redefining comfort in taste, texture & beyond

The GLP-1 user finds comfort in different tastes, textures and new habits altogether. This is an area that is rife for innovation - the human need for comfort persists, but **the pathways towards it are evolving**

A close-up, artistic photograph of a human eye, focusing on the iris and pupil. The eye is light-colored, possibly hazel or green, and is looking directly at the viewer. The skin around the eye is visible, showing fine lines and texture. The overall tone is slightly desaturated, giving it a professional and scientific feel.

Want to find out more
about the implications for
your category?

We have specific insights for
food & snacking, flavoured
beverages & alcohol.

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