GLP-1

What Drives Today's GLP-1 Consumers

A Comprehensive Analysis of Changing Behaviors and Nutrient Needs

November 2024



Eat Well Global

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Executive Summary

Eat Well Global surveyed 720 GLP-1 medication users and 432 Registered Dietitian Nutritionists (RDNs) across the U.S. in October 2024, offering critical insights to help the food and health industries address GLP-1 users' unique needs.



With three out of four GLP-1 users reporting high satisfaction with the medication, GLP-1 receptor agonists are proving a powerful ally in achieving weight loss and enhancing overall health and well-being.



Protein, Portion Control, and Plenty of Water: the medication drives users to adopt lighter, more functional diets. GLP-1 users also transform their eating habits with smaller, more frequent portions and embrace a holistic approach to health, incorporating regular physical activity, supplementation, and proactive health monitoring.



Primary Care Physicians currently serve as the main resource for most GLP-1 users, but users working with Registered Dietitian Nutritionists report higher satisfaction with their results and higher commitment to a healthier lifestyle.



GLP-1 users are spending more on food, groceries, and health-related products and showing interest in GLP-1 companion offerings — an incredible opportunity to support them on their health journey.

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Eat Well Global: Why We're Here

Healthcare professionals are multi-dimensional. They serve as role models, advisors, influencers, partners, and policy makers. At Eat Well Global, we bring businesses and healthcare professionals together to **drive brand growth and improve food and health systems**.

The profound impact of Glucagon-Like Peptide 1 receptor agonists (GLP-1 medications) on public health and the food industry continues to unfold. We hope this report leaves you feeling empowered to adapt in a fast-changing industry.

As a **Certified Woman-Owned Business and Certified B Corporation**, we are always grateful to partner with other leaders in nutrition and sustainability. Let's work together to create a more sustainable, healthy future.

WOMEN OWNED® Certified B Corporation®

As you explore these insights, keep in mind our commitment to supporting your innovation, transformation, and engagement efforts

At Eat Well Global, we see “healthy and sustainable” as a necessity, not just a nicety. We work hard to make that happen within food, pharmaceutical and agriculture companies, commodity boards, retailers and global health organizations. **How can we help you?**

INSIGHTS

Bespoke insights and industry-wide reports to fill critical knowledge gaps and inform your strategic decisions.

- Portfolio innovation guidance
- Consumer surveys and focus groups
- Health influencer surveys and focus groups
- ATNI/WBA/DJSI strategic support
- Competitor landscaping
- White papers and primers
- Research monitoring
- Regulatory mapping
- Food systems landscaping
- *And more*

STRATEGY

Strong, tailored strategy to future-proof your business.

- Global health, wellbeing and sustainable nutrition strategies
- Nutrient profiling system assessment and application
- Nutrition targets and roadmaps for action
- Commitments, goals & KPIs
- Policy development
- *And more*

ENGAGEMENT

Protect and enhance your brand reputation.

- Influencer & ambassador program strategy
- Continuing professional education for healthcare professionals (HCPs)
- Conference & event strategy
- Scientific research & symposia
- HCP-targeted digital marketing
- *And more*



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CLICK for more information on our work, including case studies and how we can help your business specifically navigate the changes faced by GLP-1 medication



One

The GLP-1 Landscape

Quick recap: what are GLP-1 receptor agonists?

Known as “glucagon-like peptide 1” drugs, these medications were created to help improve blood sugar control for people living with Type 2 Diabetes, **but have also been found to aid in weight loss** by curbing hunger and slowing digestion.

Common brands include:

- ✓ Dulaglutide (Trulicity®)
- ✓ Exenatide extended release (Bydureon Bcise®)
- ✓ Exenatide (Byetta®)
- ✓ Liraglutide (Victoza®, Saxenda®)
- ✓ Lixisenatide (Adlyxin®)
- ✓ Semaglutide (Ozempic®, Wegovy®, Rybelsus®)
- ✓ Tirzepatide (Mounjaro®, Zepbound®)

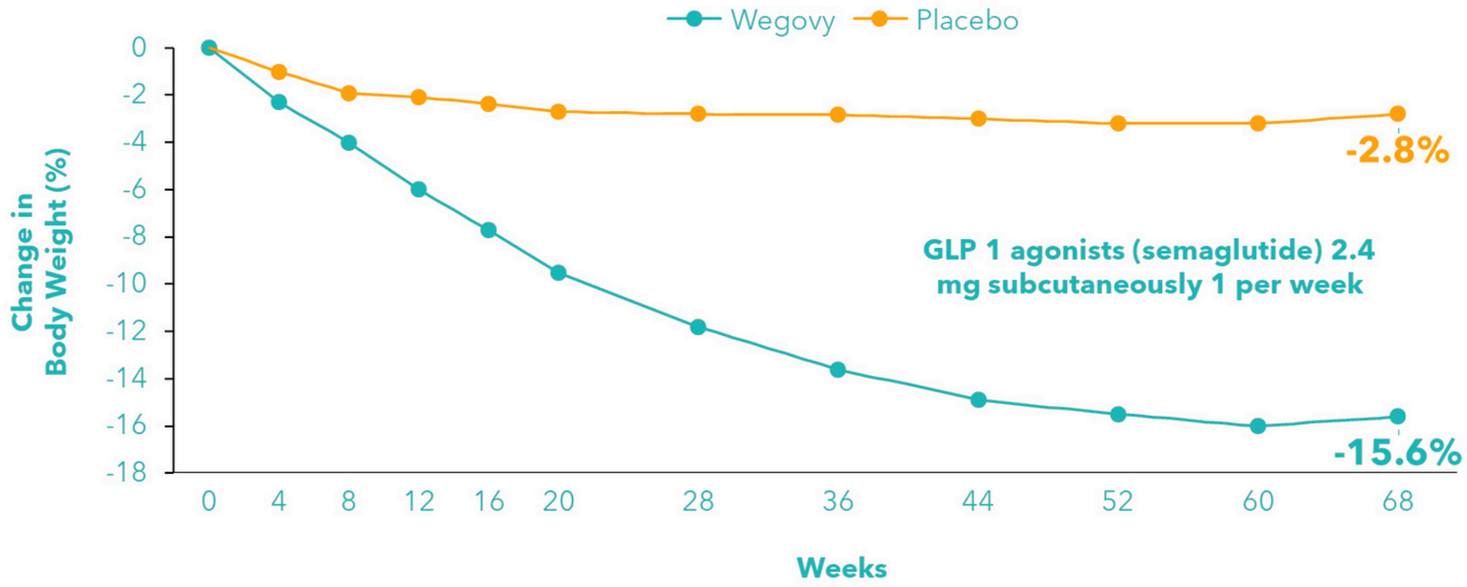




Source: Mayo Clinic, October 2024

GLP-1 receptor agonists (GLP-1s) have been found effective for weight loss in individuals with overweight and obesity and against obesity-related chronic diseases like diabetes

A study funded by Novo Nordisk[1] revealed that patients using these medications experienced a **significant weight reduction of 10% to 20% within 6 to 12 months**, while those on a placebo lost an average of 2.8% of their initial body weight. Results from a recent landmark trial called SELECT[2], found that taking one of the leading obesity medicines provided a **73% reduction in the risk of developing diabetes** and a **20% drop in the risk of heart attacks, strokes and cardiovascular deaths**.



Sources:
1 Value Gene Consulting, Navigating Change: The Impact of GLP-1 Drugs on the Food Industry and Dietary Habits
2 The New England Journal of Medicine, Semaglutide and Cardiovascular Outcomes in Obesity without Diabetes, November 2023

The public interest in GLP-1s in the U.S. is unsurprising and unprecedented

42% of Americans over 20 years old live with obesity[1]

- And 20% of Americans under 20 years old live with obesity
- 15% of Americans over 20 live with diabetes
- 45% of Americans over 20 have hypertension

40% of Americans want to lose weight[2]

- This is primarily made up of Gen Z, followed closely by Millennials, then Gen X, and lastly Boomers+
- Women (45%) desire weight loss more than men (35%)

1 in 8 American adults have been estimated to have used a GLP-1 agonist[3]

- Rising to 4 in 10 among adults who have been diagnosed with diabetes

GLP-1 model forecasts 18m people will be on GLP-1s by 2029 in the U.S.[4]

- UBS global GLP-1 model forecasts 40 million people on GLP-1s by 2029, with 44% in the US (17.6 millions)
- This translates into $126bn sales by 2029, a 2023-2029 sales CAGR of 30%

Sources:
1 National Center for Health Statistics, National Health and Nutrition Examination Survey, 2017-March 2020 data files.
2 The New Consumer, Consumer Trends Survey, January 2024
3 KFF Health Tracking Poll May 2024: The Public's Use and Views of GLP-1 Drugs
4 UBS Evidence Lab GLP-1 Survey

GLP-1s are creating a paradigm shift for their users, as well as for the food, beverage, health and wellness industries

GLP-1s affect users' diets, shopping habits, and general health and well-being.

GLP-1 users turn to healthier, more balanced, nutrient-dense food and beverage choices[1]

They consume less soft drinks, alcohol and salty snacks and cut back on eating at fast food and pizza restaurants[1] [2]

More shop online and use online meal kit providers[3]

They buy smaller clothing sizes[4]

And exercise more often[2]



Sources:
1 Eat Well Global, US RDN online survey, March 2024
2 Morgan Stanley, Scaling Up the Impact of Obesity Drugs, May 2024
3 YouGov Profiles, May 2024
4 Impact Analytics, June 2024

Several food and health companies have already addressed the needs of GLP-1 users by launching GLP-1 nutrition support platforms and food and beverage products marketed as GLP-1 companion products

Source: Eat Well Global research

Nestlé's Vital Pursuit product range and GLP-1 Nutrition Platform

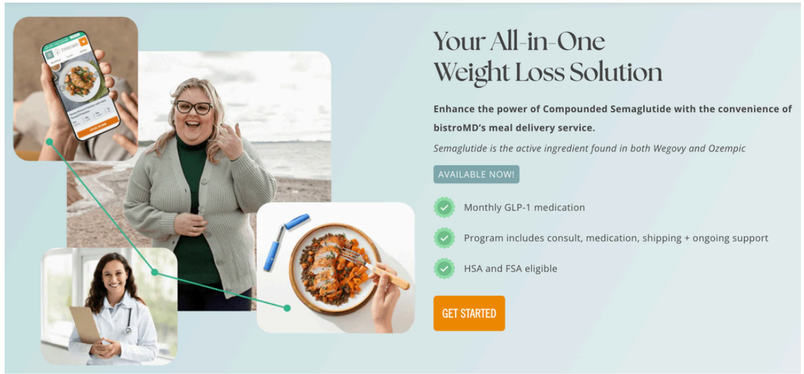




The Vitamin Shoppe's Whole Health program

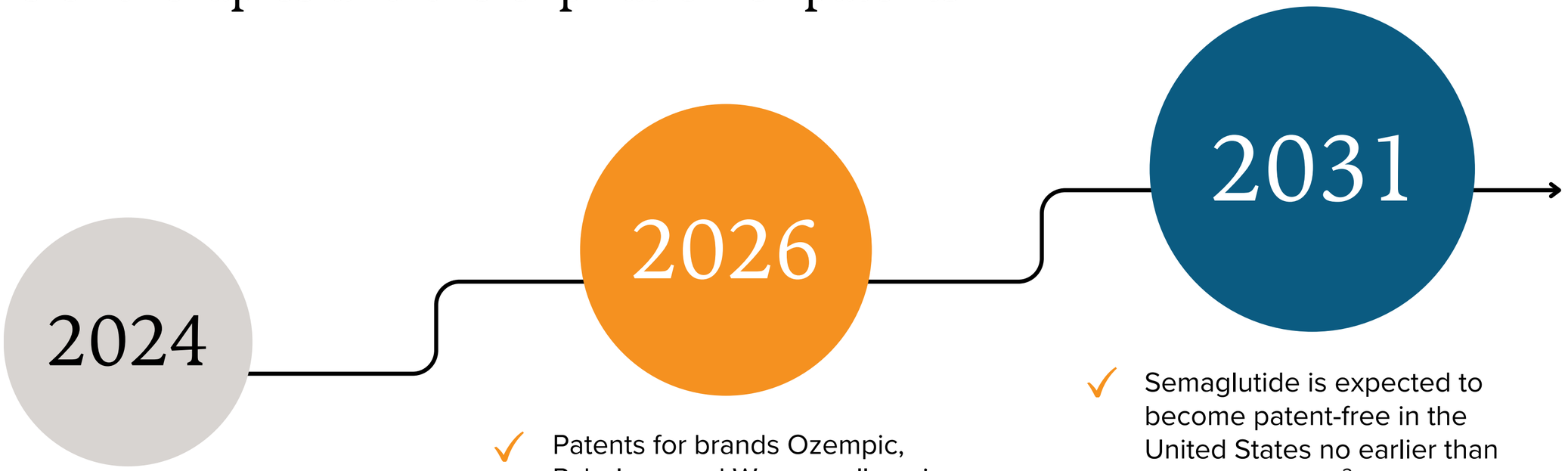


BistroMD's All-in-One Weight Loss Solution



and Daily Harvest's GLP-1 meal kits delivery, GNC's Semaglutide Weight Loss Program, Costco's Weight Loss Program, Noom's Weight Loss Platform, Herbalife's GLP-1 Nutrition Companion Product range…

Usage and accessibility of GLP-1s are anticipated to rise with the launch of new forms of therapies and the expiration of patents



- ✓ Launch of compounded GLP-1 medications (Hims & Hers, Ro, Noom)
- ✓ Launch of generic liraglutide injections (Victoza, Saxenda)

- ✓ Patents for brands Ozempic, Rybelsus, and Wegovy all expire March 20, 2026[1]
- ✓ Semaglutide's patent in Canada will expire – Sandoz plans to launch a generic semaglutide[2]

- ✓ Semaglutide is expected to become patent-free in the United States no earlier than December 2031[3]

Sources:
1 National Library of Medicine at the NIH
2 Barron's, August 2024
3 DrugPatentWatch

GLP-1s are here to stay.

How can the food and beverage industry adapt and innovate to stay relevant with the changing nutrient needs and behaviors of GLP-1 users?





Two

The Research

Our research addresses a knowledge gap in the industry

Existing research states a lack of evidence to determine unique nutrition needs of adults on GLP-1 medications in order to establish firm nutritional guidelines:

Christensen S, Robinson, K, Thomas S, Williams DR. 2024. Dietary intake by patients taking GLP-1 and dual GIP/GLP-1 receptor agonists: A narrative review and discussion of research needs. Obesity Pillars. 11:100121.



Methods:

This narrative literature review summarizes clinical studies quantifying and characterizing dietary intake in people with obesity and/or T2DM using GLP-1 or GIP/GLP-1 RAs.



Results:

Though data from these studies reveal that total caloric intake was reduced by 16-39%, few studies evaluated the actual composition of the diet.



Conclusions:

Further research is needed to understand the unique nutritional needs of adults on GLP-1 or dual GIP/GLP-1RAs and to support the development of nutritional guidelines for these individuals.

Source: Obesity Pillars, July 2024

In the absence of conclusive peer-reviewed research on the topic, it is essential to gather insights from GLP-1 users and healthcare professionals to identify an optimal diet composition that may help reduce treatment-related side effects and support users' overall health and well-being.



28%

of U.S. dietitians reported they worked with GLP-1 users who experienced gastroparesis[1]

Healthcare professionals worry that reduced caloric intake and appetite may lead to malnutrition and inadequate protein and micronutrient intake[1] [2]

Some GLP-1 users have reported that they became pregnant after taking the drugs, despite being infertile or using birth control pills[3]

Sources:
1 Eat Well Global, US RDN online survey, March 2024.
2 Obesity Pillars, July 2024
3 Healthline, March 2024

We surveyed 720 GLP-1 users and 432 Registered Dietitian Nutritionists (RDNs) across the U.S. to get closer to the truth

Our first GLP-1 study (March 2024)

- ✓ At the start of the year, we conducted a **survey of 430 U.S. Registered Dietitian Nutritionists** focused on weight management to understand their views on weight loss medications and their recommendations for patients using GLP-1 medications.
- ✓ This initial phase **addressed a knowledge gap in the industry**, offering critical insights into **RDN perspectives on GLP-1 medications**.

Objectives for this new report (October 2024)

- ✓ Broadening Perspectives
  By bringing in the consumer view, this survey expands on initial insights by **combining consumer and RDN perspectives** — an approach that provides a unique, holistic view of the GLP-1 landscape that isn't available elsewhere.
- ✓ Deep Dive into RDN Recommendations
  We explore RDNs' thoughts further on dietary changes and the ideal nutritional profile for GLP-1 users, offering a closer look at **opportunities for GLP-1 companion products**.
- ✓ Impact of RDNs
  We sought to understand how **consumers guided by RDNs** differ in their experiences and behaviors compared to those without RDN guidance.

How this research drives strategic value

Dual Value Proposition of the Report

- ✓ **Monitoring Tool** for stakeholders evaluating risks and opportunities in the food and health space
- ✓ **Actionable Insights** for those involved in strategy and execution across product development, marketing, and policy

Key Insights for Application

- ✓ **Product Development**: “Dream GLP-1 Companion Product” perspectives from RDNs to guide GLP-1-focused offerings
- ✓ **Market Innovation**: Exploration of diet changes, food choices, side effects management, and nutritional needs, presenting innovation and renovation opportunities for food companies

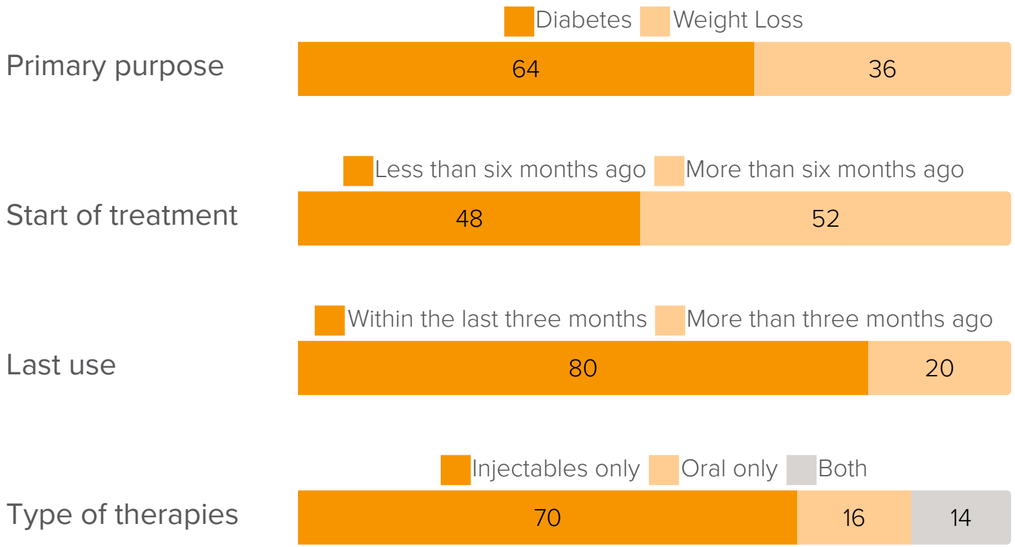
The report is designed for product developers, marketers, policy makers, healthcare professionals, foodservice providers, and key opinion leaders in food and health.

It serves as an essential resource for those in the food and health industries seeking a strategic and practical guide to addressing GLP-1 users' unique needs.



We surveyed 720 U.S. adults who have used or are currently using prescription glucagon-like peptide 1 agonist medications (GLP-1s) for diabetes or weight loss

We've gathered robust samples representing a diverse range of GLP-1 user profiles.



Survey dates: September 20th-October 3rd
NB: Further profiling analysis based on these attributes is available for purchase



53%
use private health insurance

43%
use Medicare/Medicaid

8%
pay out-of-pocket

Question: How are you currently paying for your prescription glucagon-like peptide 1 (GLP-1) agonist medication?



58%
have used Ozempic

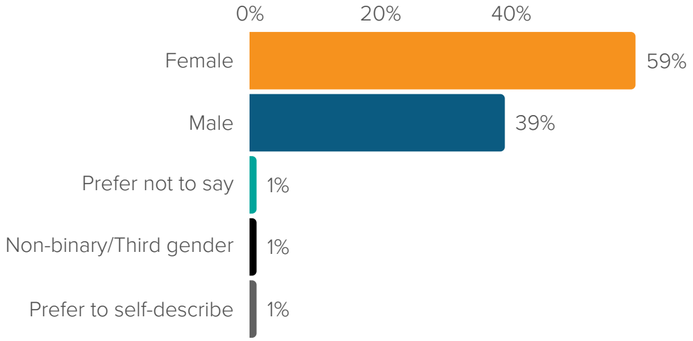
23%
have used Mounjaro

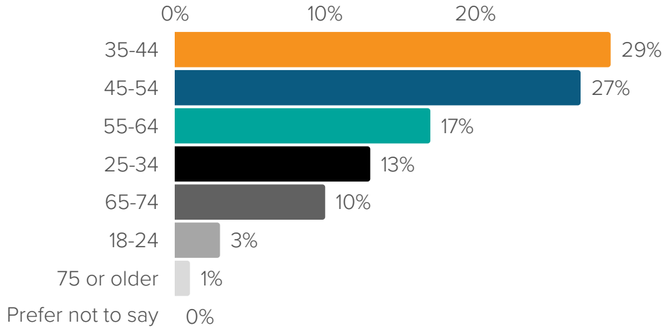
21%
have used Trulicity

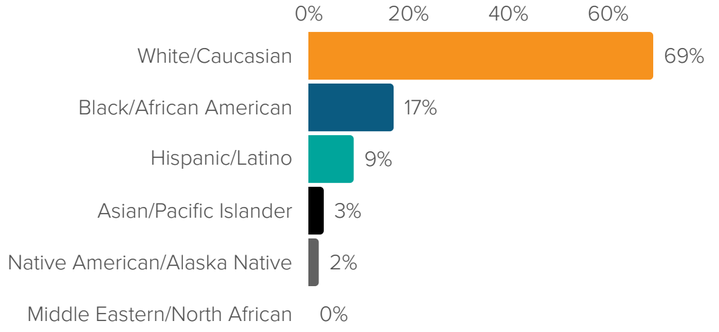
Question: Which of the following prescription glucagon-like peptide 1 (GLP-1) agonist injectable brands have you ever used? (Top 3)

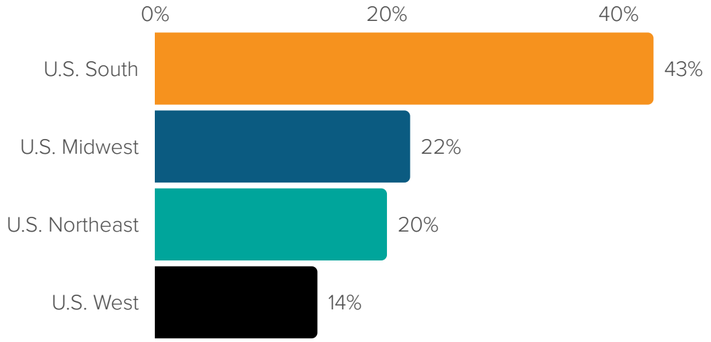
All demographic and socio-economic profiles are represented

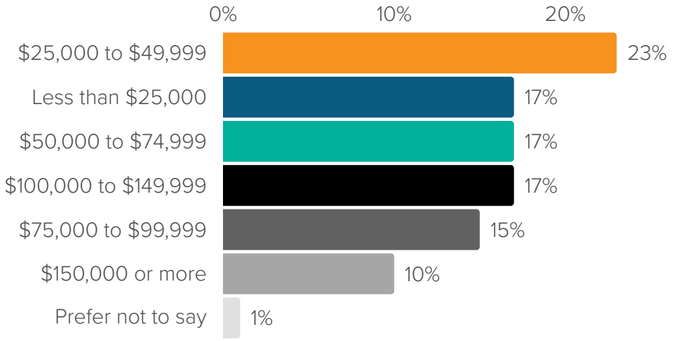
The average U.S. GLP-1 user is Female, 35-54 years old, and White/Caucasian.

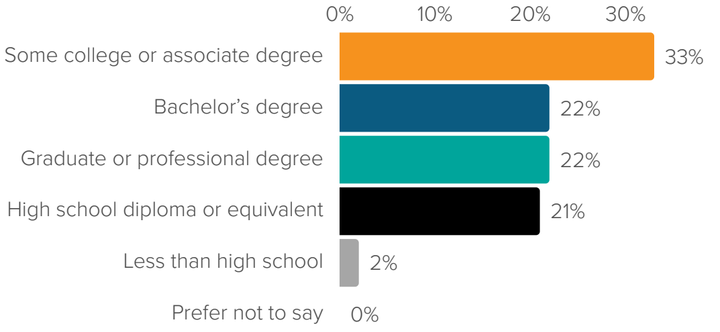












NB: Further profiling analysis based on these attributes is available for purchase

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

We surveyed 423 US Registered Dietitian Nutritionists (RDNs) who work with patients taking GLP-1 agonist medications

Our survey reflects the active and experienced part of the U.S. dietitics profession. They are highly specialized in weight management and/or diabetes and work with adults or seniors.



98%

are RDNs

Others are Nutrition and Dietitics Technicians, Registered (NDTRs)



71%

have 11+ years of experience



93%

provide recommendations to patients daily or several times a week

Survey dates: October 1st-23rd
NB: Further profiling analysis based on these attributes is available for purchase



65%

work in Weight Management



48%

work in Diabetes



34%

work in Cardiovascular health

Question: What is/are your primary area(s) of care?



90%

work with Adults



69%

work with Seniors



11%

work with Adolescents

Question: For which of the following populations do you most often make food/nutrition recommendations?

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Three

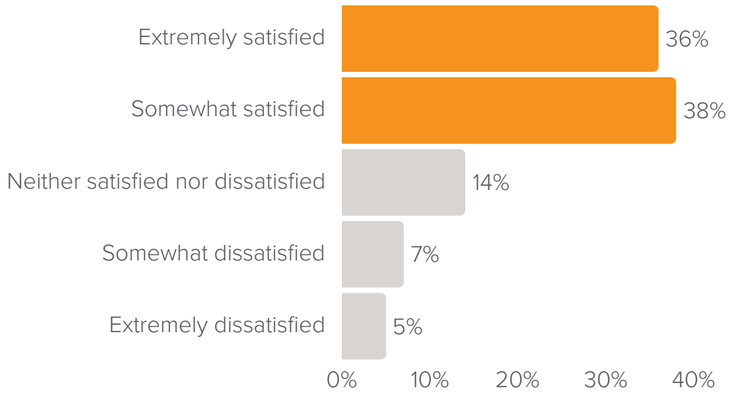
GLP-1 Users and the Medication

A positive and transformative experience for most

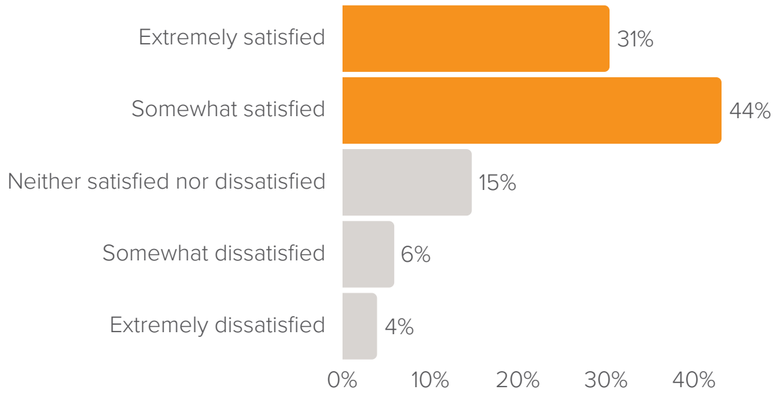


Three out of four respondents are satisfied to extremely satisfied with the impact of GLP-1 medication on their weight loss goals and overall health and well-being

74% are **satisfied/very satisfied** with the impact of GLP-1 on their **weight loss goals**



75% are **satisfied/very satisfied** with the impact of GLP-1 on their **overall health and well-being**



Question: Thinking of weight loss goals and overall health and wellness, how satisfied are you with the impact of prescription GLP-1 agonist medication? (n=720)

Dietitian insights

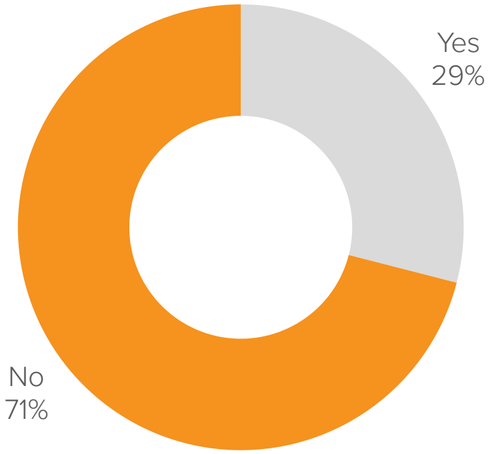
There is higher satisfaction among GLP-1 users than among RDNs treating patients on GLP-1s.

% of RDNs somewhat satisfied or extremely satisfied:
Weight loss goals: 67%
Health and well-being: 59%

Eat Well Global US GLP-1 RDN survey, March 2024

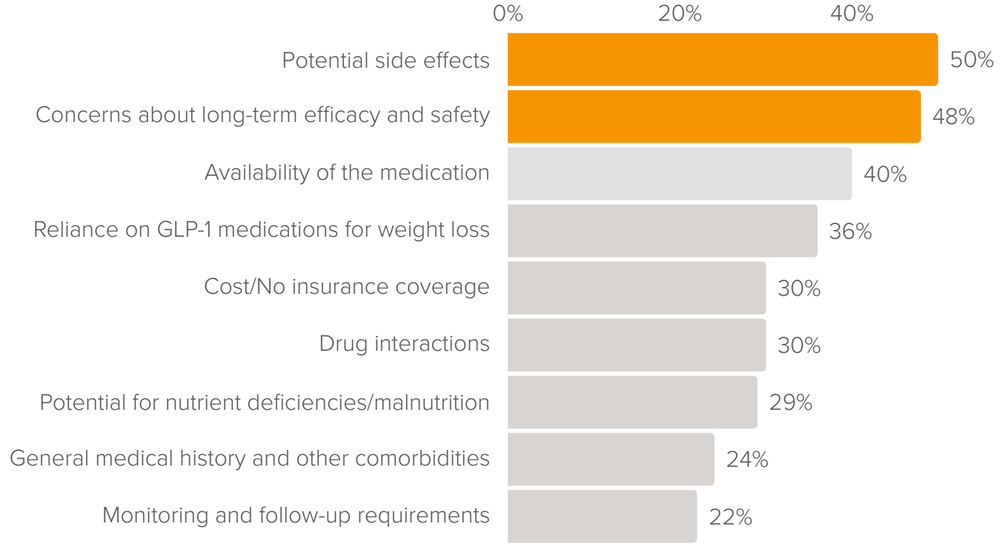
Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

More than two-thirds of GLP-1 users report no concerns about the medication



Question: Do you have any concerns about prescription GLP-1 agonist medication? (n= 720)

Those with concerns share similar apprehensions as RDNs regarding the **potential side effects** and the **long-term efficacy and safety**.



Question: Which of the following concerns do you have about prescription GLP-1 agonist medication? (n=209; 71% filtered out)

Dietitian insights

GLP-1 users are less concerned about the medication than RDNs (29% vs 59% for RDNs).

RDNs are concerned about long-term efficacy and safety (73%), potential side effects (71%) and reliance on the medication (66%).

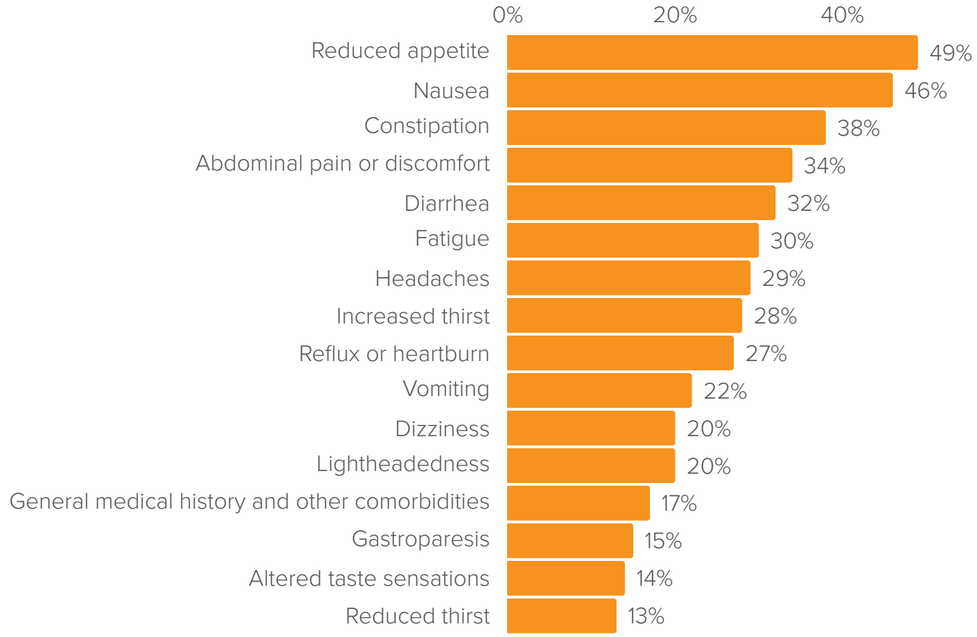
Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

However, more than half of the respondents experience side effects while taking the medication



Question: Thinking specifically of side effects that impact appetite or food choices, have you ever experienced side effects after or while taking prescription GLP-1 agonist medication? (n=720)

Beyond reduced appetite, the **primary side effects are gastrointestinal**.



Question: Which of the following concerns do you have about prescription GLP-1 agonist medication? (n=399; 45% filtered out)

Dietitian insights

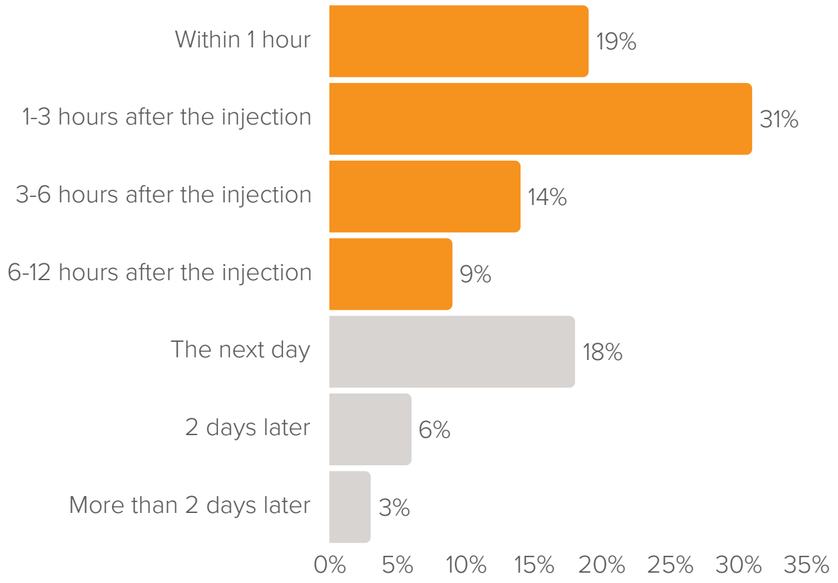
GLP-1 users report similar side effects to their RDNs.

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

For most, these symptoms are short-term, often appearing soon after injection and fading by day's end

73%

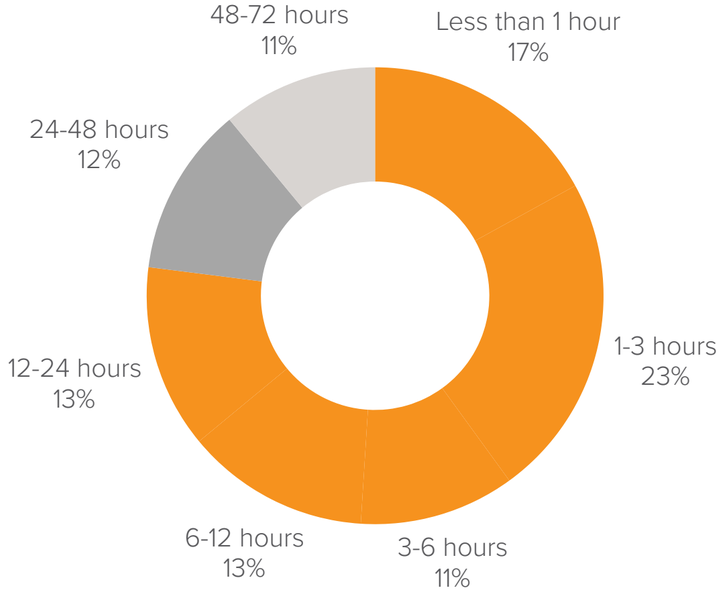
begin to experience side effects **within the first day**



Question: How soon after taking your prescription GLP-1 agonist medication do you typically begin to experience side effects that impact food choices? (n=399; 45% filtered out)

77%

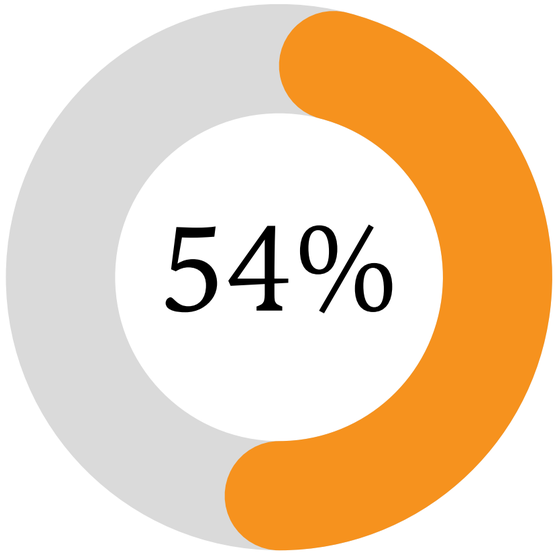
have symptoms **last up to 24 hours**



Question: Once side effects begin, how long do they typically last? (n=399; 45% filtered out)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Importantly, side effects do not significantly affect satisfaction levels. Even among those reporting side effects, half remain unconcerned about the medication



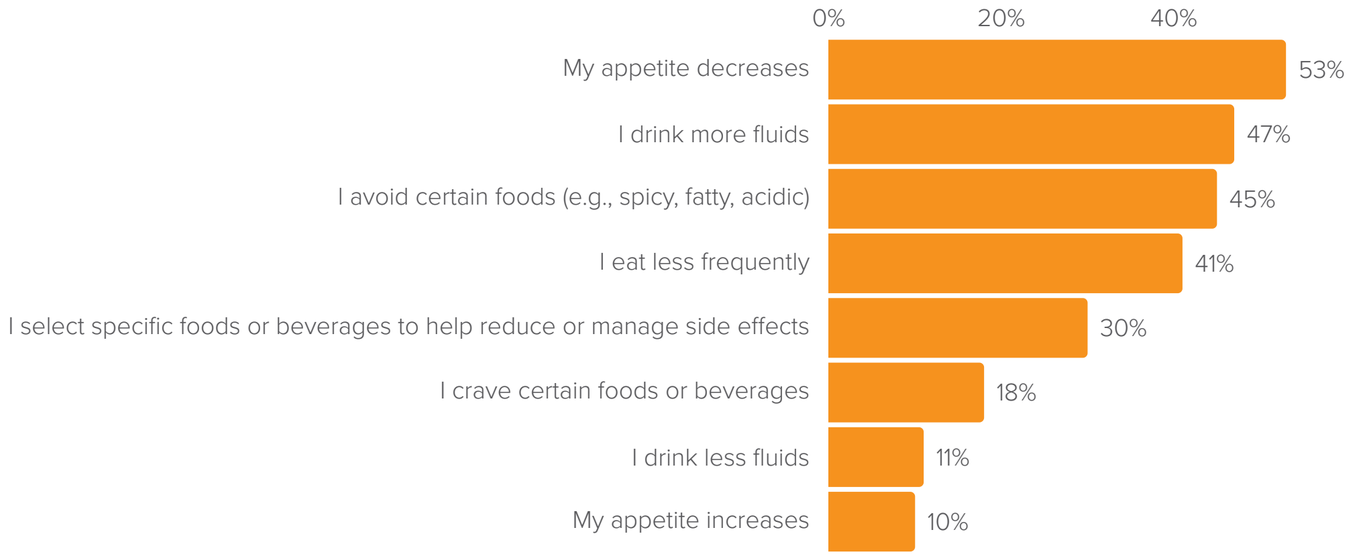
of GLP-1 users who experience side effects have no concerns about the medication

GLP-1 users, whether or not they experience side effects, report similar satisfaction with the medication's impact on weight loss and overall health and well-being

	GLP-1 users who experience side effects	GLP-1 users who don't experience any side effects
Satisfied with impact of medication on weight loss goals	75%	73%
Satisfied with impact on overall health and well-being	74%	76%

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

GLP-1 medications influence more than just appetite suppression and physical side effects; they contribute to changes in dietary choices and eating behaviors



Question: Which side effects have you experienced after or while taking prescription GLP-1 agonist medication? (n=399; 45% filtered out)

Dietitian insights

98% of polled RDNs have observed a change in their GLP-1 patients' eating habits, predominantly a reduction in portion sizes and number of eating/snacking occasions. Most find these changes to be consistent across age and gender groups.

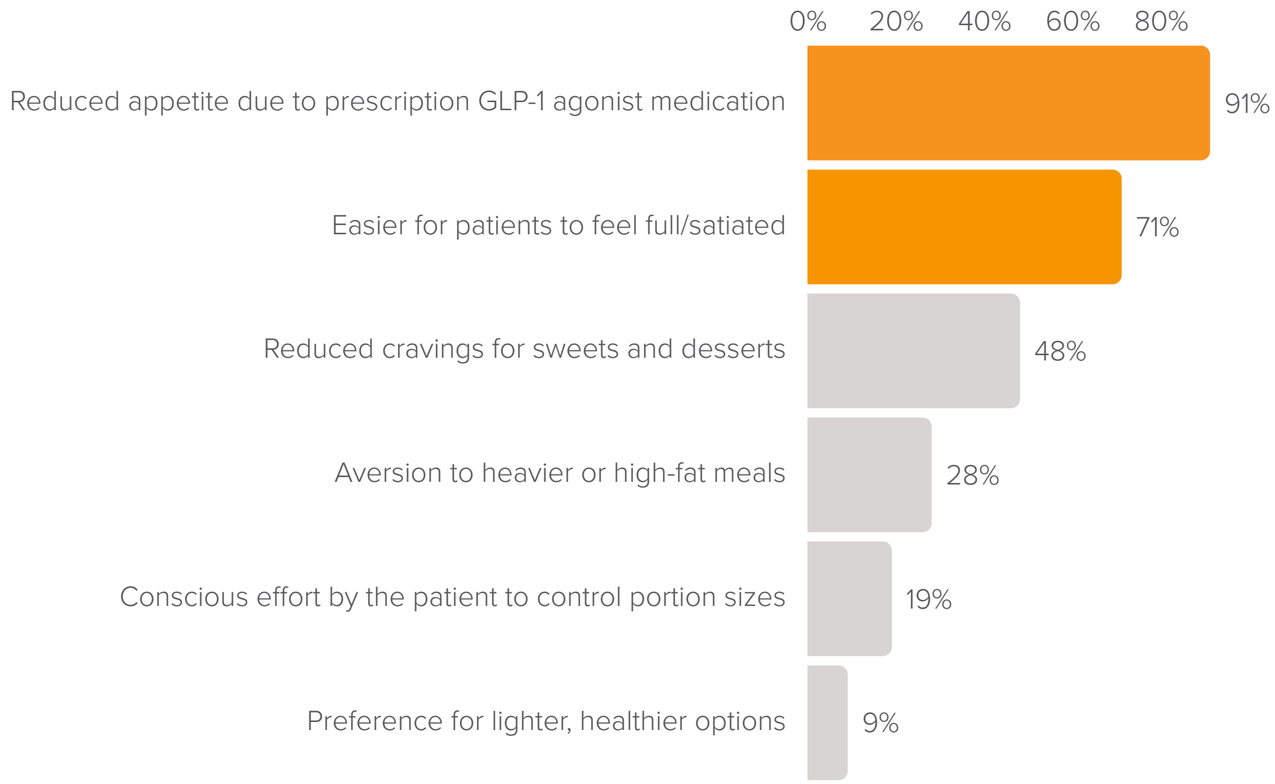
"I don't feel the need to binge eat like I used to and I feel more motivated to get in shape and be healthier."

"I eat smaller to not fill my stomach so full."

"My sweet cravings have reduced significantly especially for sodas. Now I drink a lot of water to stay hydrated."

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

RDNs consider GLP-1 medication a major driver behind the noticeable shifts in eating habits



Question: You indicated your patients' eating habits have changed, to what do you believe these changes are primarily attributed? (n= 414; 2% filtered out)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024



GLP-1 Users and the Medication - Section summary

A positive and transformative experience for most

With three out of four patients satisfied and two-thirds expressing no concerns, the medication has a strong positive perception overall.

While the majority of users experience side effects, these symptoms are short-lived and don't impact satisfaction, suggesting the benefits are significant enough for many to consider it worthwhile even with potential drawbacks.

Beyond curbing appetite, the medication appears to drive meaningful shifts in dietary choices and eating patterns, signaling its potential to support sustainable lifestyle changes and further solidify its role in weight management strategies.

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Four

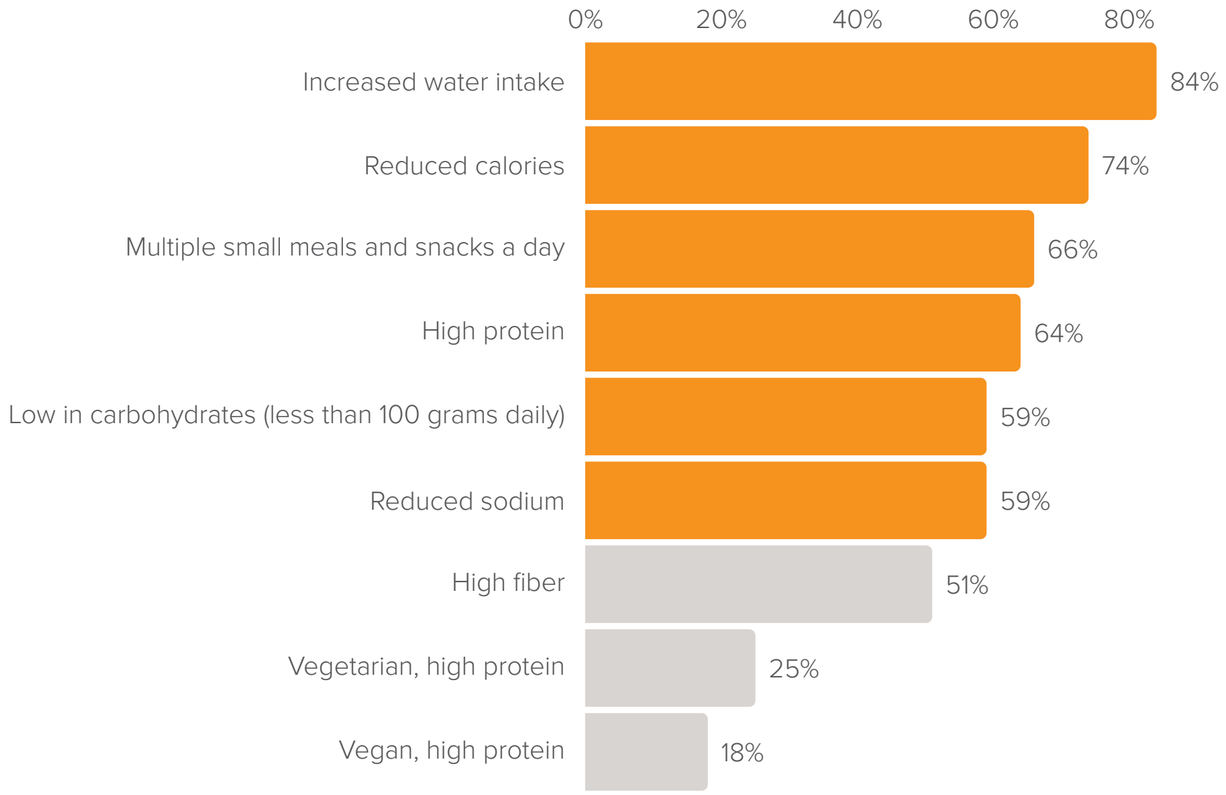
GLP-1 Users and Dietary Choices

Function over pleasure



Four

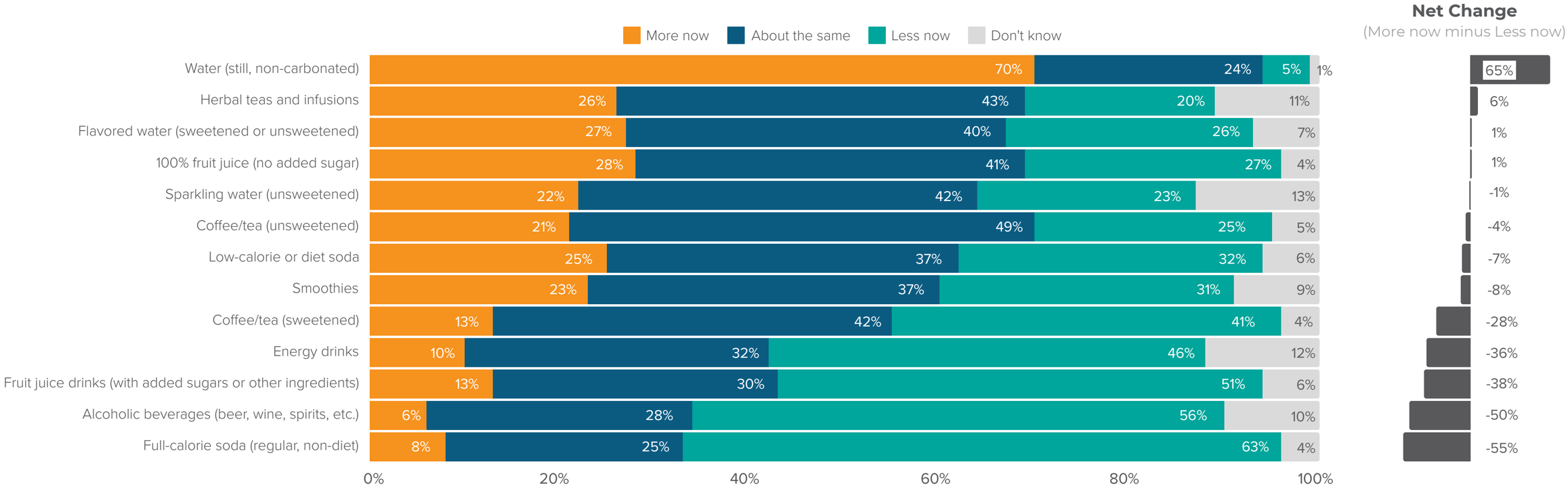
GLP-1 users drink more water and mostly seek foods that are high in protein and lower in carbs and sodium



Question: Are you currently following a specific diet pattern in conjunction with your prescription glucagon-like peptide 1 (GLP-1) agonist medication? (n=720)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

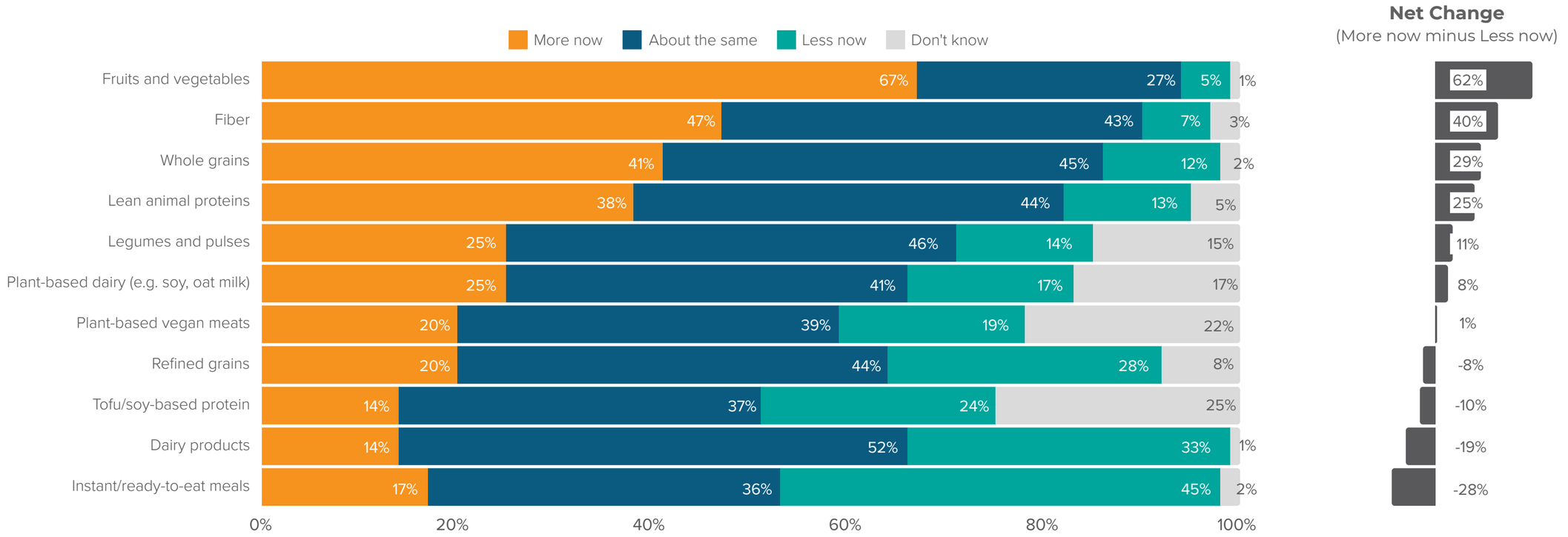
GLP-1 users largely prioritize still water in their beverage choices at the expense of full-calorie soda, alcohol, and fruit juice drinks. Teas, flavored water and 100% fruit juice are the most preferred alternatives.



Question: How has the consumption of the following beverages changed since starting prescription GLP-1 agonist medication? (n=720)

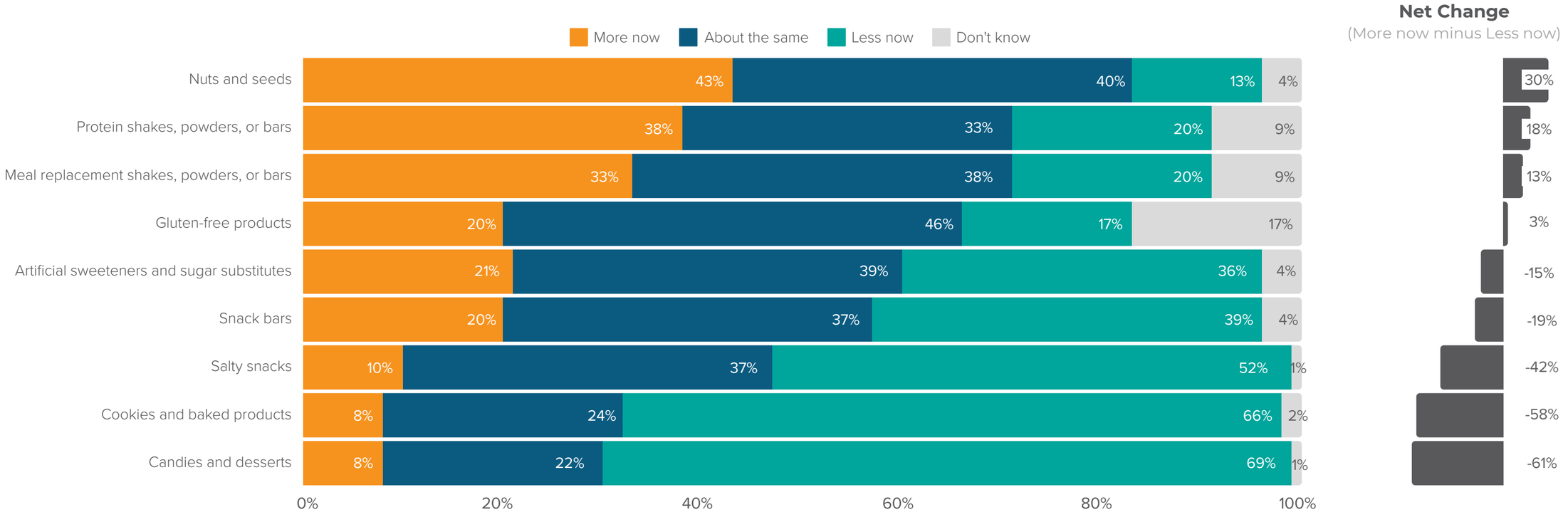
Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

GLP-1 users turn to fruits and vegetables, whole grains, and lean animal proteins and move away from instant/ready-to-eat meals



Question: How has the consumption of the following primary foods and meals changed since starting prescription GLP-1 agonist medication? (n=720)

GLP-1 users show a clear shift from indulgent snacks to light and functional snacks like nuts and seeds and protein shakes



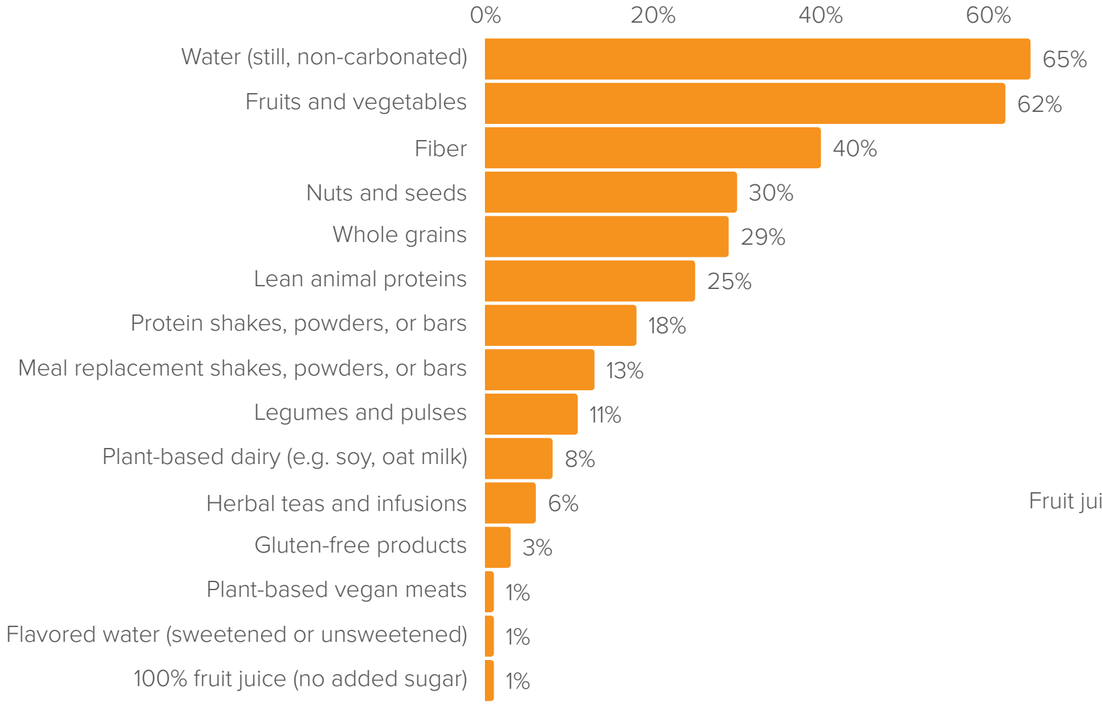
Question: How has the consumption of the following snacks and supplements changed since starting prescription GLP-1 agonist medication? (n=720)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Overall, GLP-1 seek lighter, nutritious, and functional options across meals, drinks, and snacks

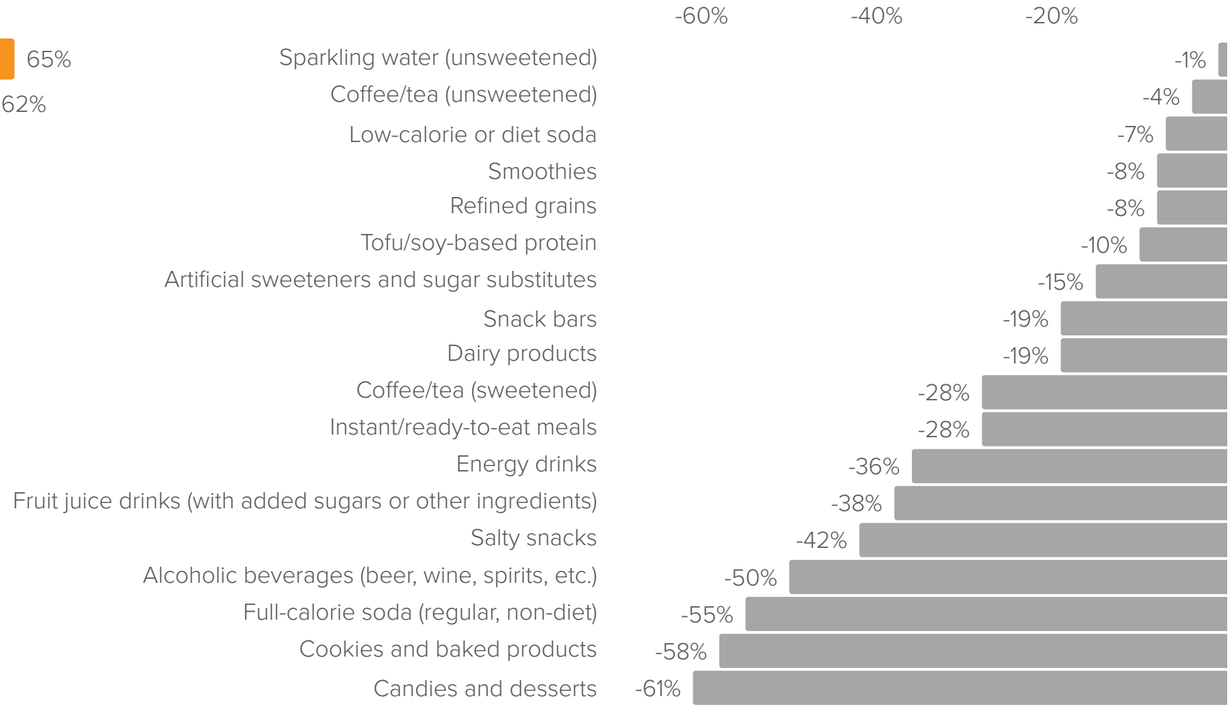
Top by net change

('consume more now' minus 'consume less now')



Bottom by net change

('consume more now' minus 'consume less now')

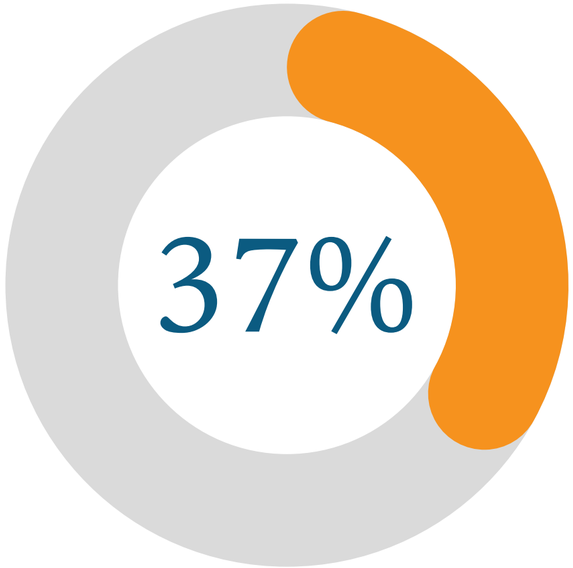


Dietitian insights

RDNs observed similar dietary changes from their patients.

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

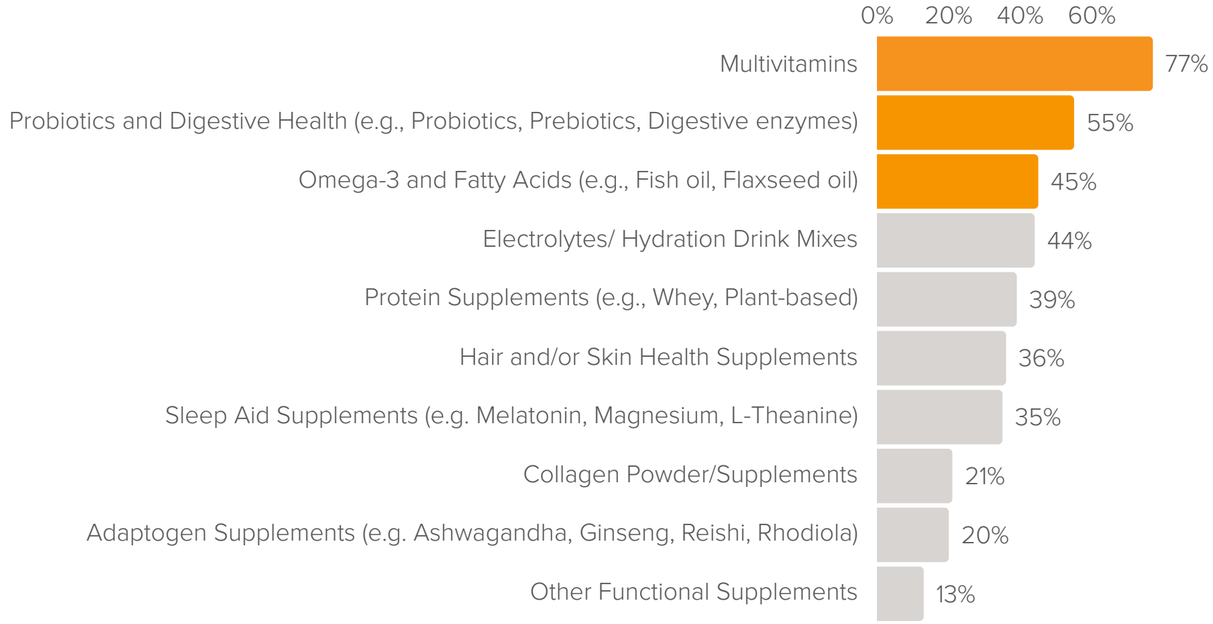
Supplementation is essential for 37% of GLP-1 users



have health supplements as part of their routine

Question: Which types of foods do you purchase most often while taking prescription GLP-1 agonist medication? (n= 720)

Among those who often purchase health supplements, more than half take **probiotics and digestive health-related supplements**.



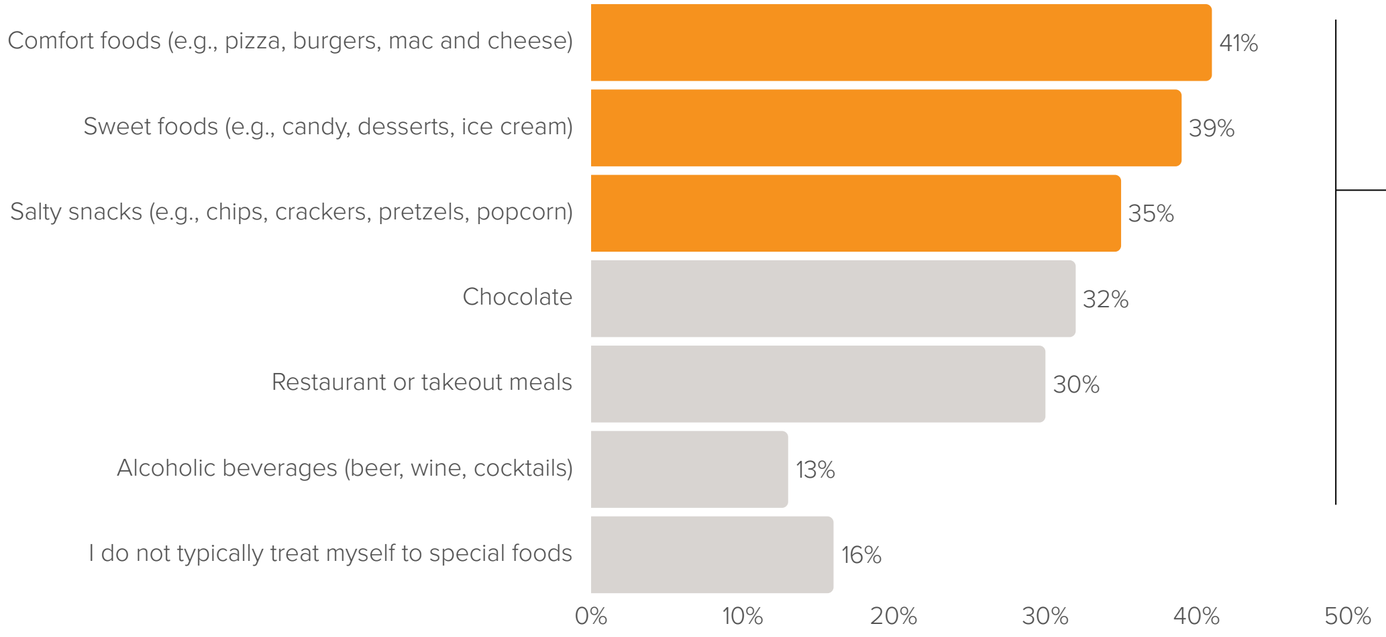
Question: Which types of supplements do you currently use? (n=266; 63% filtered out)

Dietitian insights

RDNs recommend Multivitamins (77%), Protein supplements (66%), Probiotics and Digestive Health (60%), and Fiber supplements (58%) the most.

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

For the occasional indulgence, most opt for comfort foods, sweet foods, and salty snacks



84%

occasionally treat themselves to special foods while on the medication

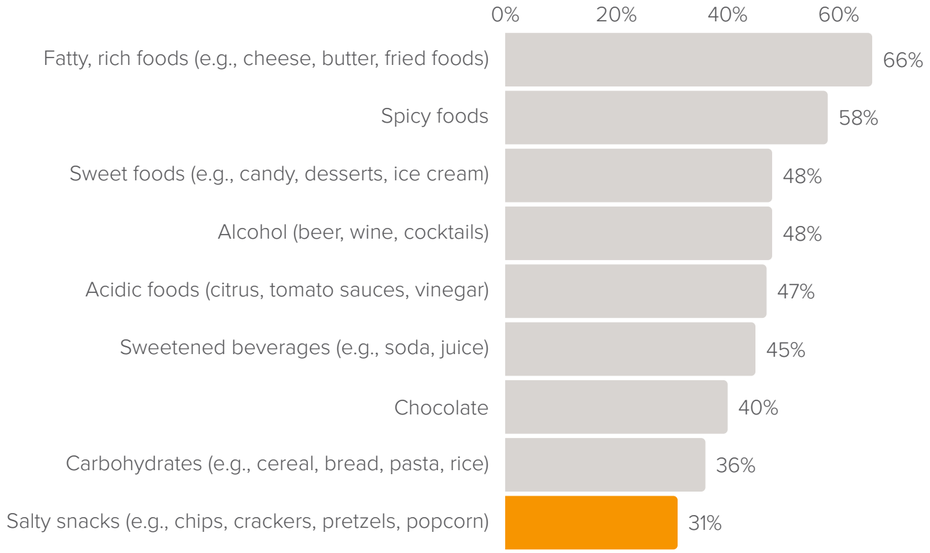


Question: When you want an occasional indulgence while taking prescription GLP-1 agonist medication, what types of foods or drinks do you typically choose? (n=720)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

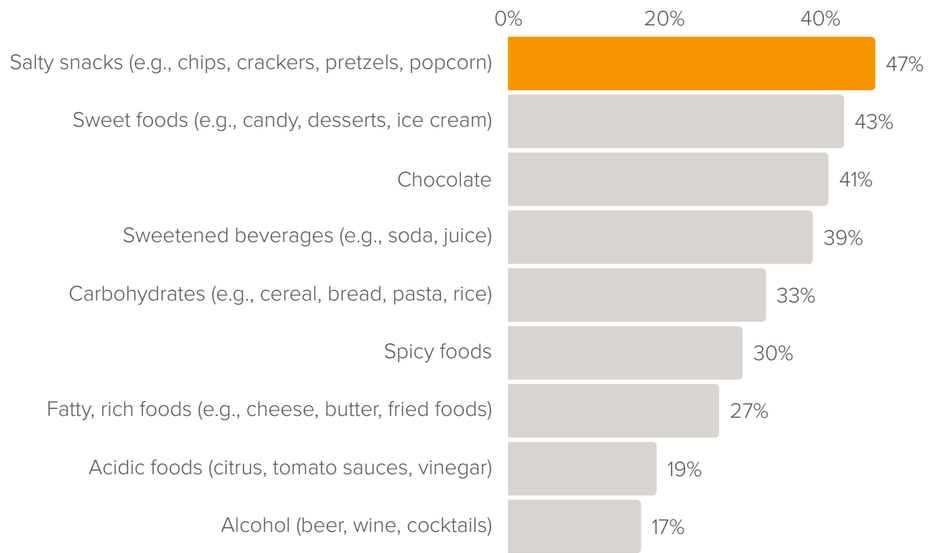
Among indulgent foods, salty snacks are the least avoided and the most craved foods

Most avoided foods while taking GLP-1s



Question: You mentioned that you avoid certain foods while taking prescription GLP-1 agonist medication. What types of foods do you avoid? (n= 181; 75% filtered out)

Most craved foods while taking GLP-1s



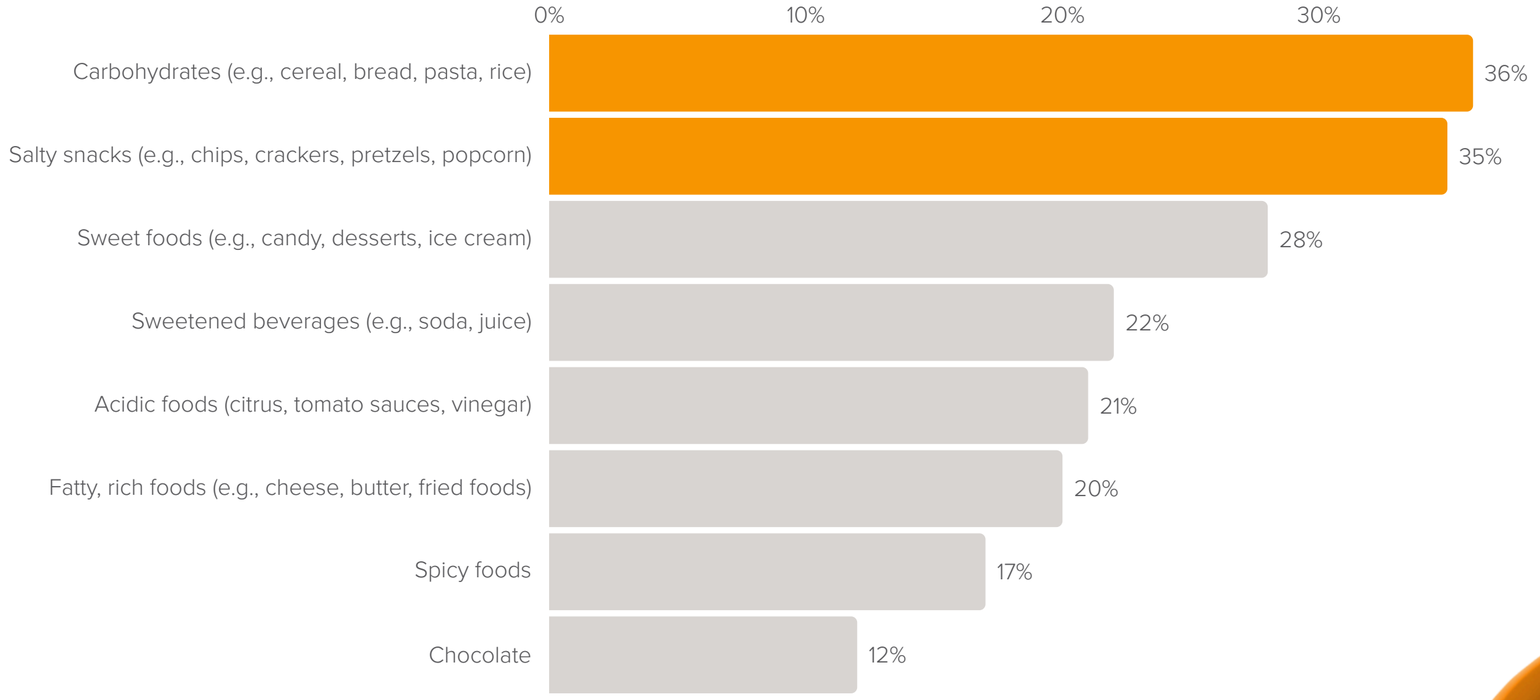
Question: You mentioned that you crave certain foods or beverages while taking prescription GLP-1 agonist medication. What types of foods or beverages do you crave? (n= 70; 90% filtered out)

Dietitian insights

RDNs recommend avoiding sweetened beverages and alcohol the most and limiting sweet foods, fatty foods and salty snacks. Most are neutral about chocolate, spicy foods, acidic foods and carbohydrates.

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Along with carbohydrates, salty snacks also are the go-to food for GLP-1 users to help reduce or manage side effects



Question: You mentioned that you select specific foods or beverages to help reduce or manage side effects while taking prescription GLP-1 agonist medication. What types of foods or beverages do you choose to help reduce or manage side effects? (n=121; 83% filtered out)



Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

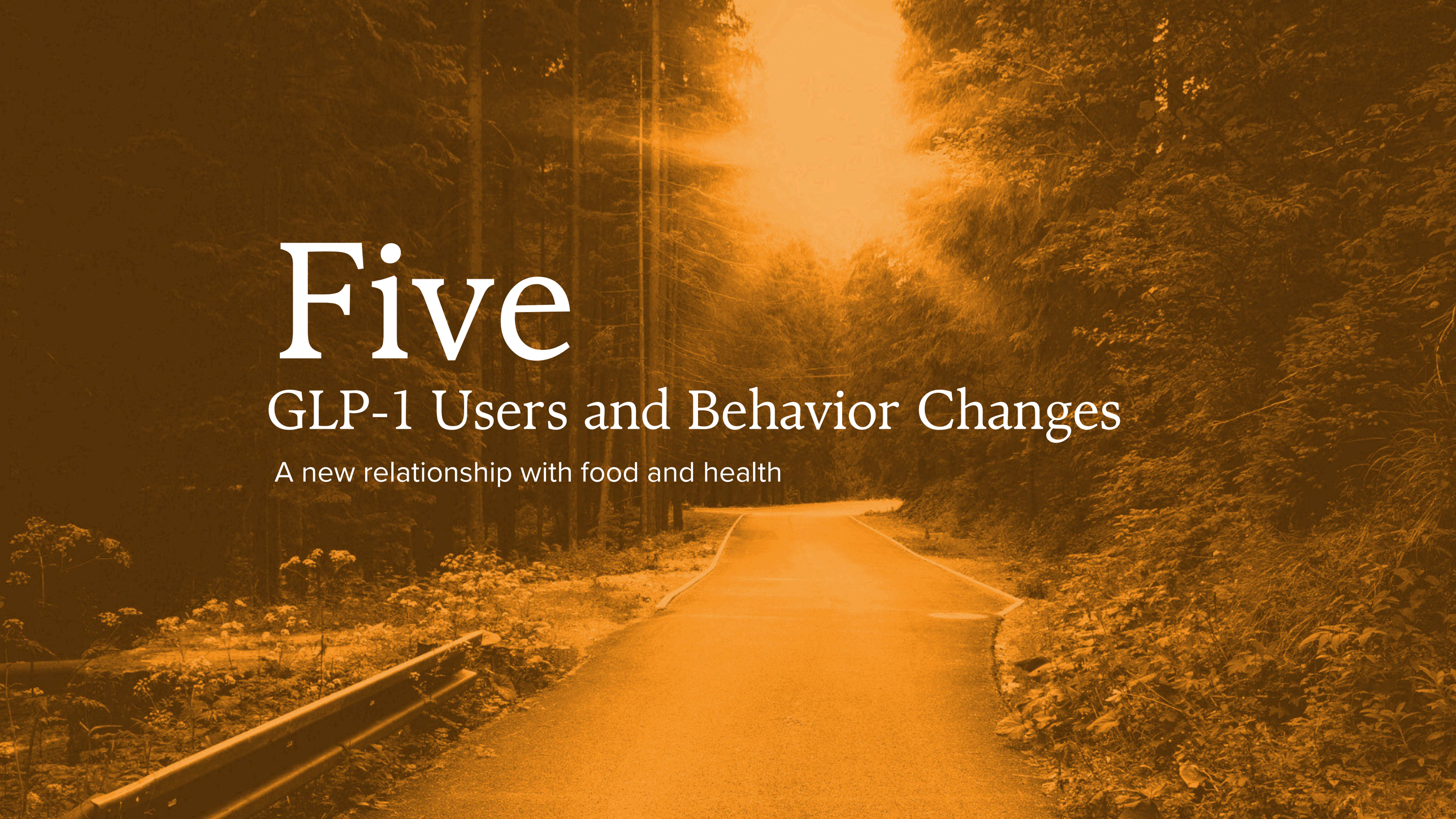
GLP-1 Users and Dietary Choices - Section summary

Function over pleasure

GLP-1 users are reshaping dietary patterns, prioritizing protein-rich foods and moving away from carb-heavy, sodium-rich options. Hydration choices have shifted significantly, with a preference for still water over full-calorie sodas and alcohol. GLP-1 users favor teas, flavored water, and 100% fruit juice as alternatives. In primary foods and meals, GLP-1 users increasingly choose fruits, vegetables, whole grains, and lean proteins, distancing from instant or ready-to-eat options. Snack preferences lean toward light, functional choices like nuts, seeds, and protein shakes, while supplements—particularly for digestive health—are popular with a third of users. As the least avoided and most craved indulgent food, salty snacks present an opportunity to cater to GLP-1 users' evolving tastes.



Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

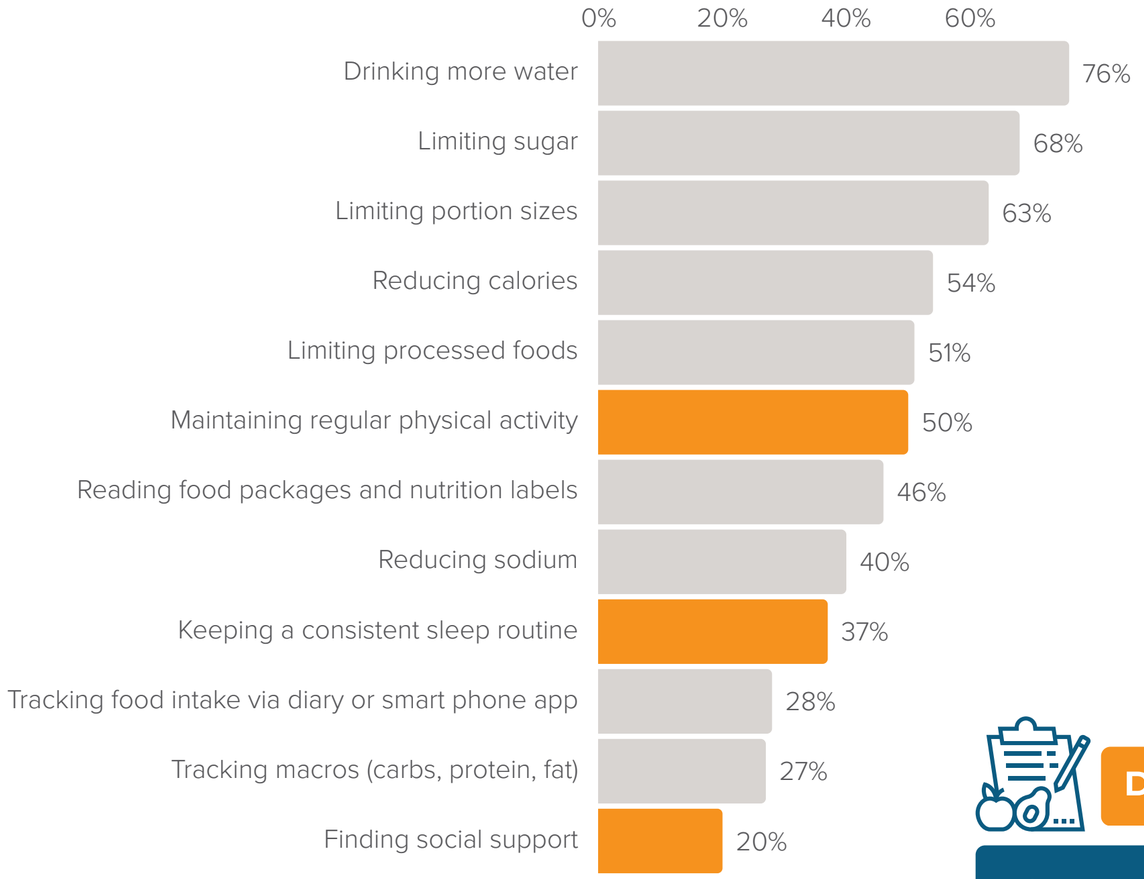


Five

GLP-1 Users and Behavior Changes

A new relationship with food and health

GLP-1 users tend to prioritize adopting new dietary habits to achieve their health and weight loss goals, while other behaviors, like maintaining a sleep routine or seeking social support, play a secondary role



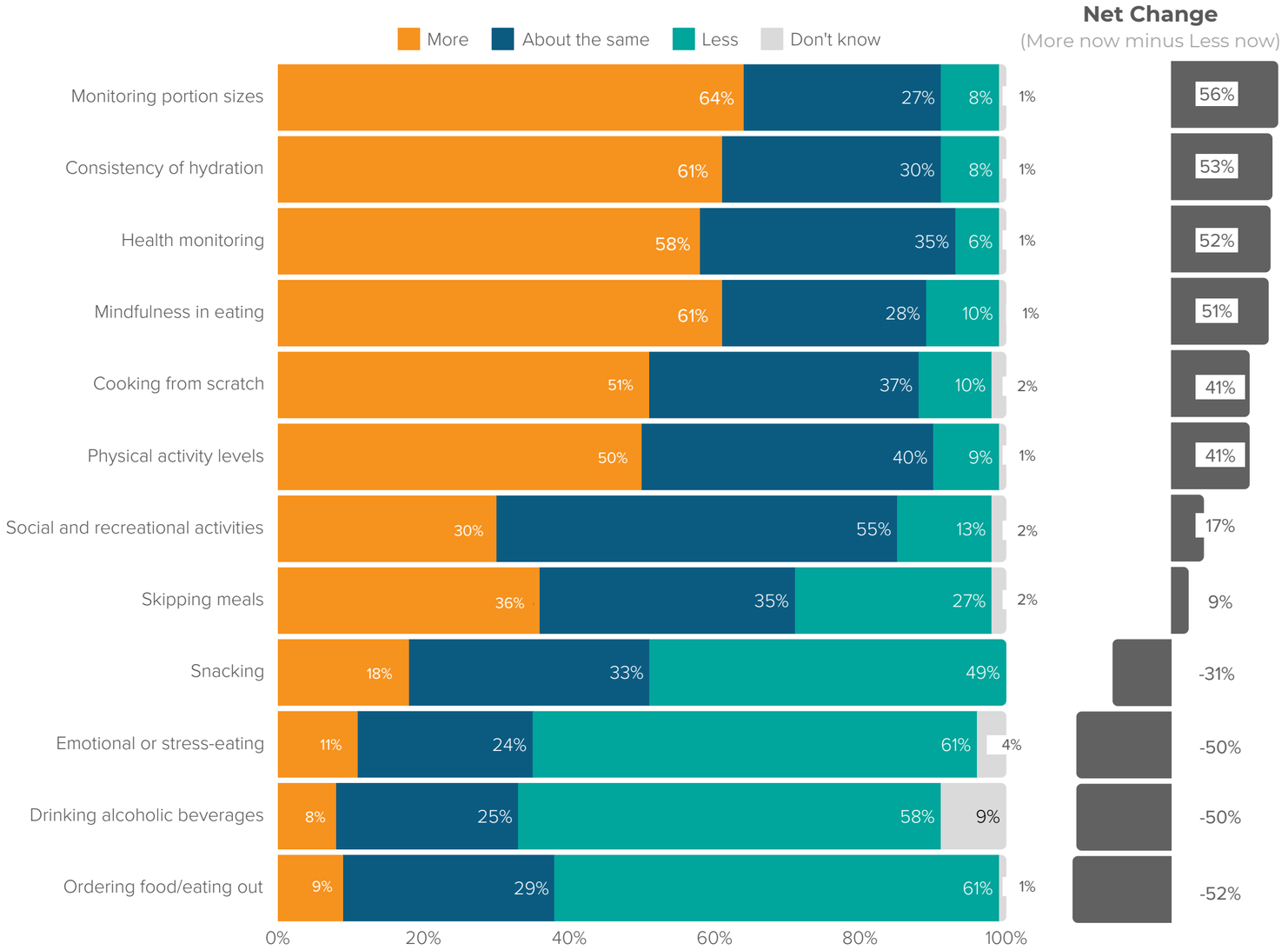
Question: Which of the following behaviors do you prioritize to help achieve your health and weight loss goals? (n=720)

Dietitian insights

Beyond healthy eating behaviors, RDNs encourage holistic healthy habits such as physical activity (92%) and keeping a consistent sleep routine (73%).

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Since starting the medication, many users have adopted healthy practices beyond diet, such as monitoring their health or increasing their physical activity levels. Emotional/stress-eating has reduced for many



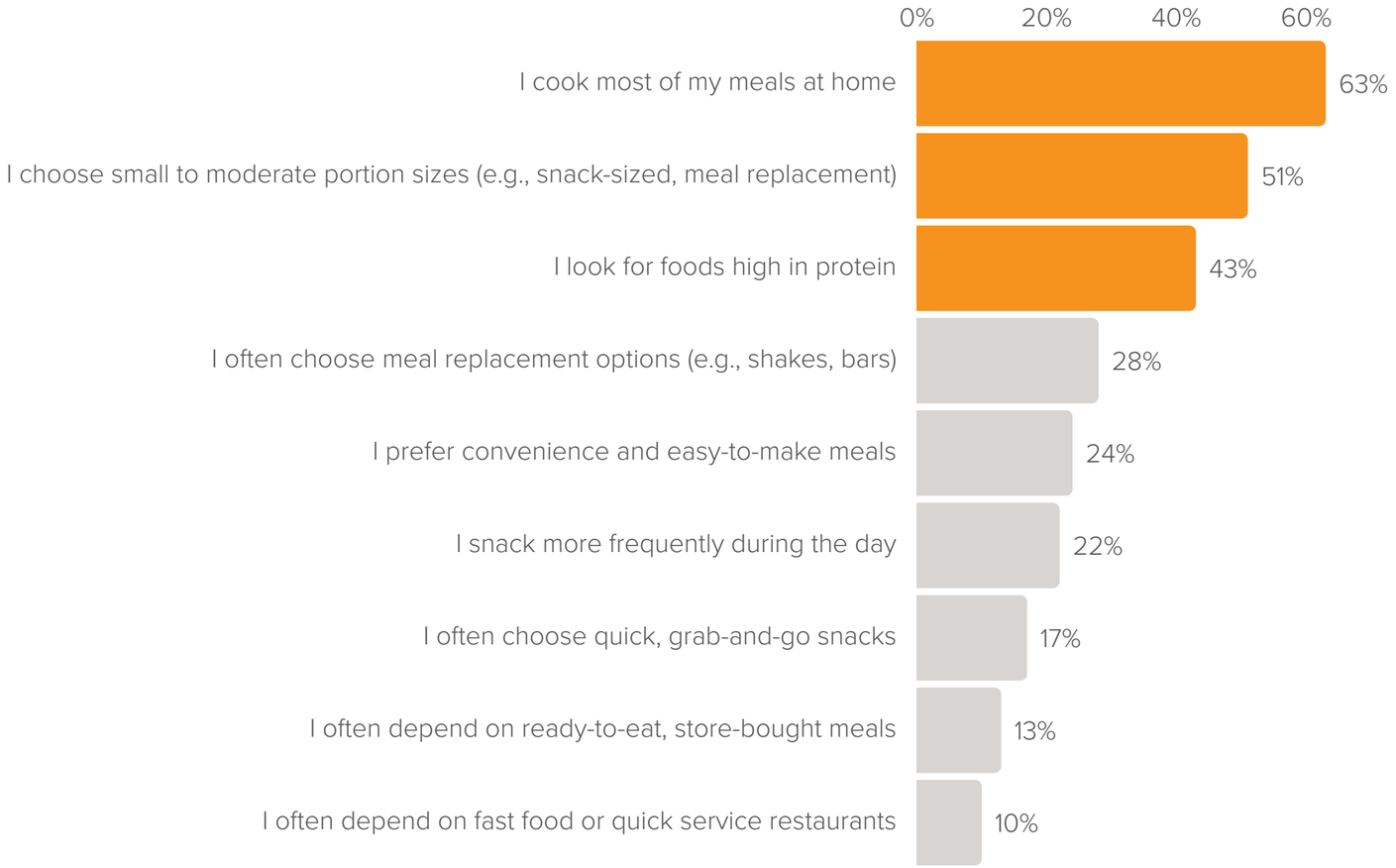
Question: How have the following factors and behaviors changed since starting prescription GLP-1 agonist medication? (n=720)

Dietitian insights

This is in line with what RDNs have observed among their patients.

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

A typical GLP-1 user now tends to cook at home, opt for smaller to moderate portions, and rely less on ready-to-eat meals or fast food



Question: Which of the following behaviors do you prioritize to help achieve your health and weight loss goals? (n=720)

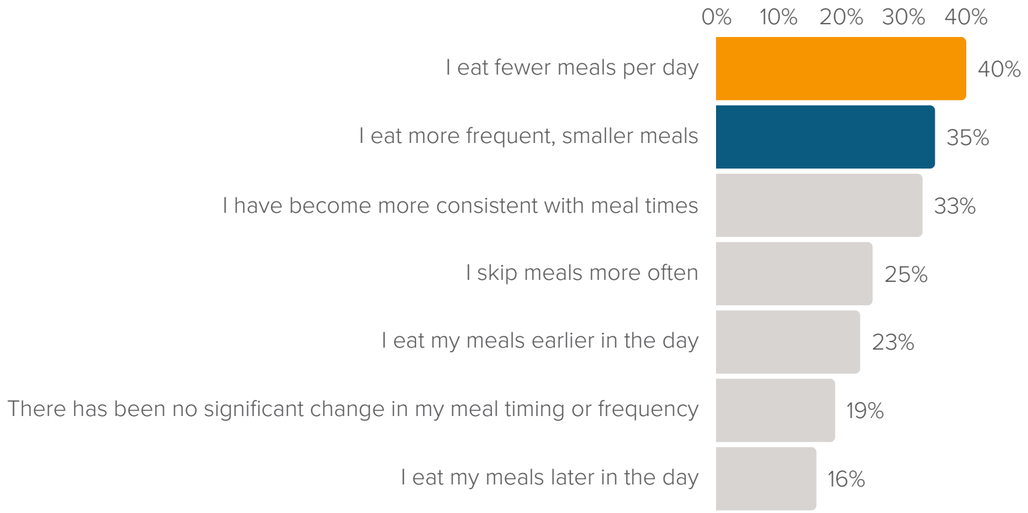
Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

The medication has significantly influenced eating patterns, with eight in ten GLP-1 users reporting changes in how often they eat meals

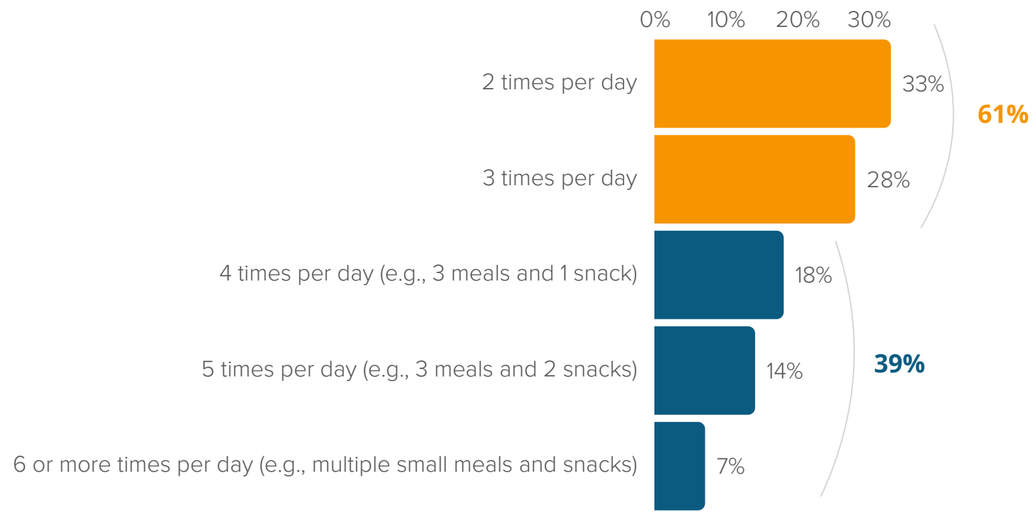
Some respondents prefer fewer meals per day (40%), with 61% ideally limiting themselves to 2-3 eating occasions (meals and/or snacks).

Meanwhile, others favor more frequent, smaller meals (35%), with 39% ideally aiming for 4 or more eating occasions throughout the day.

Meal timing remains relatively stable, with only 23% opting to eat earlier and 16% choosing to eat later in the day.



Question: Since starting your prescription GLP-1 agonist medication, how has the time and frequency of your meals changed? (n=720)



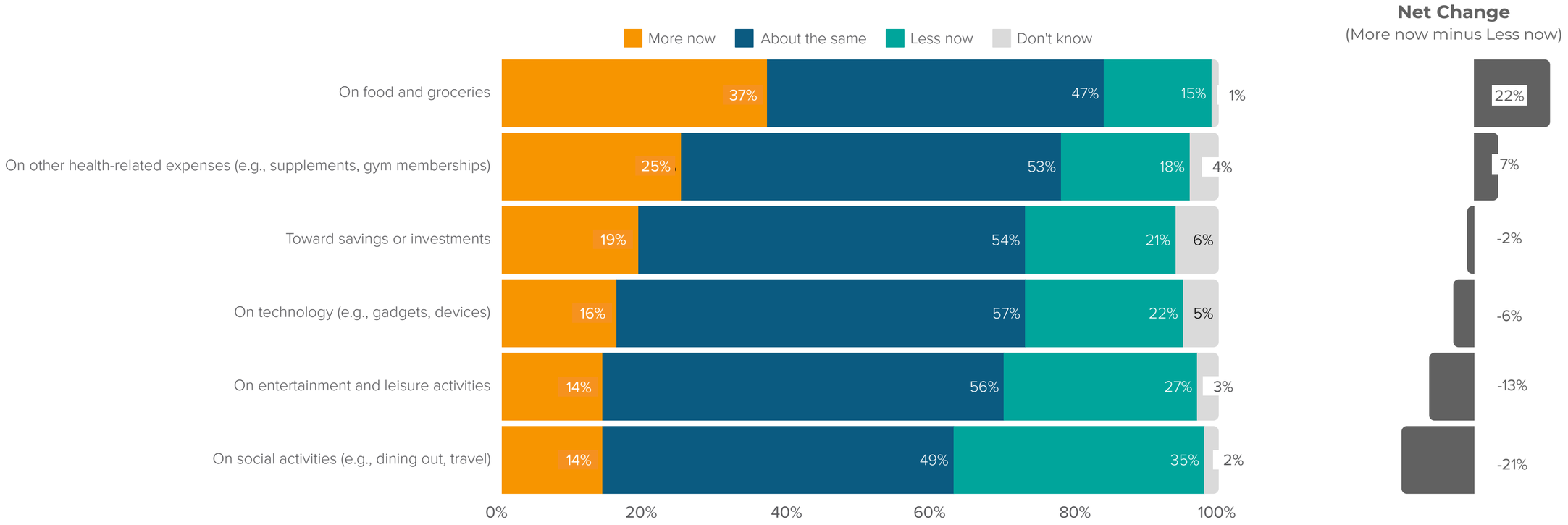
Question: How many eating occasions (meals and snacks) would be ideal for you in a typical day? (n=720)

Dietitian insights

67% of RDNs have observed patients eating meals and snacks less frequently.

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

GLP-1 users have increased their spending on food and groceries and other health-related costs, at the expense of social activities and entertainment and leisure activities

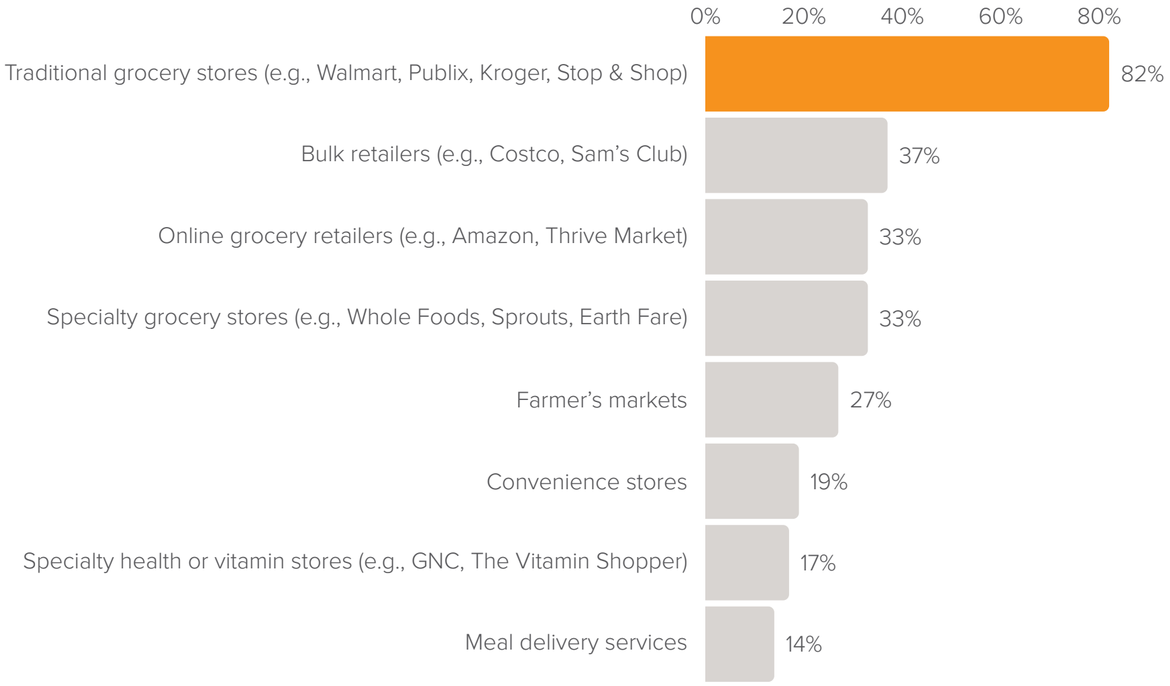


Question: As a result of the cost of your prescription GLP-1 agonist medication, have you had to change your spending in any of the following areas? (n=720)

With only 8% of respondents funding the medication out-of-pocket, there is no dramatic impact on GLP-1's users budget.

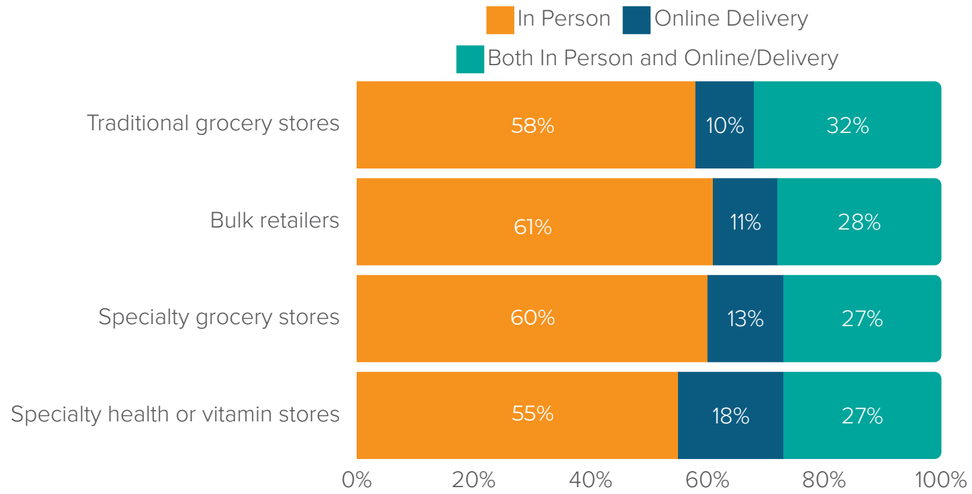
Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

GLP-1 users are purchasing their food and beverages in traditional grocery stores plus one or two other store types (bulk, online, or specialty stores)



Question: Where do you purchase your food and beverages? (n=720)

Online deliveries are slightly more popular in specialty health and vitamin stores.



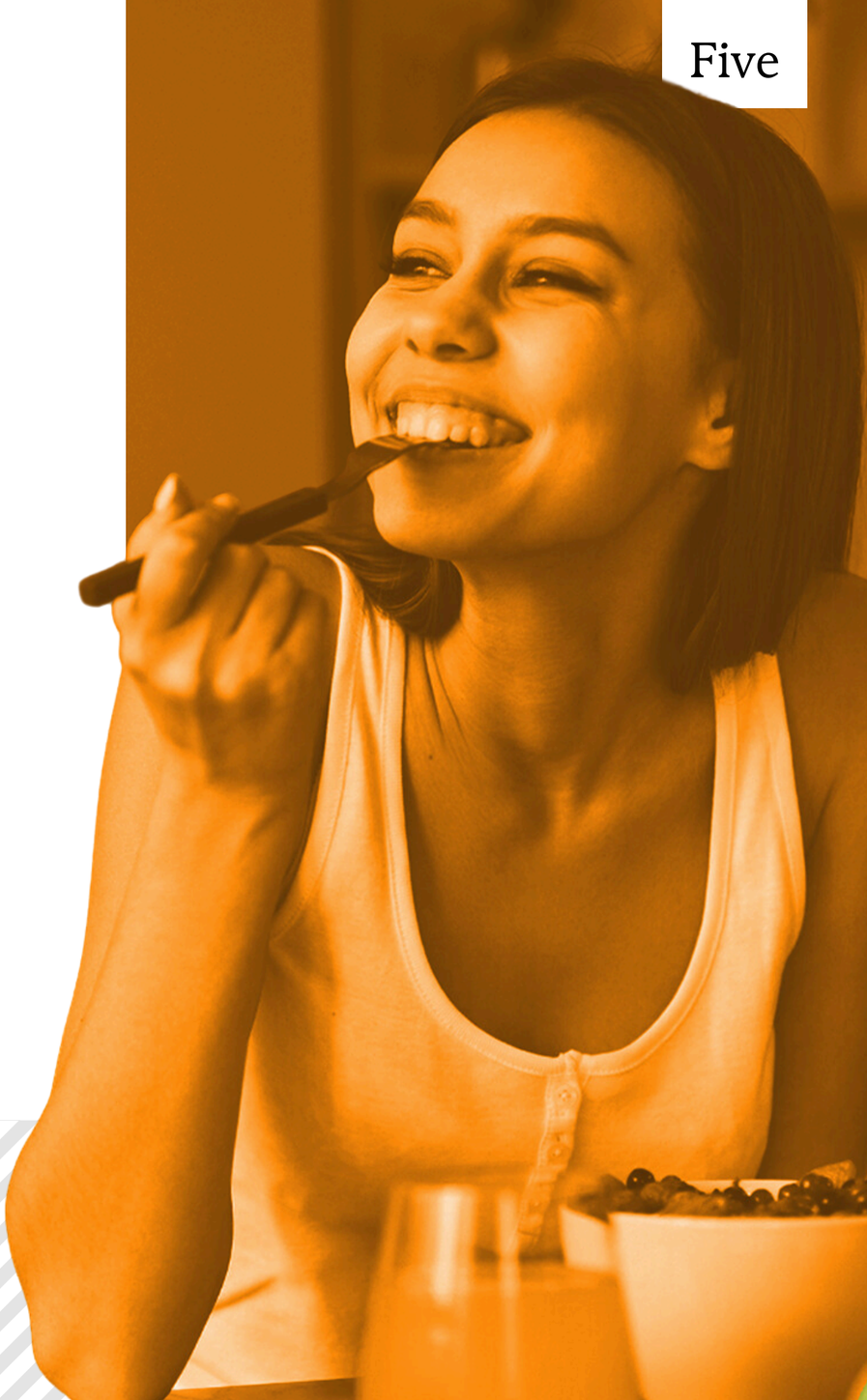
Question: When thinking about where you shop for food and beverages, do you typically shop in person, online/delivery, or both? (n=from 380 to 620)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

GLP-1 Users and Behavior Changes - Section summary

A new relationship with food and health

GLP-1 users embrace a healthier lifestyle by implementing new eating habits, such as smaller portions and home-cooked meals, as well as broader healthy behaviors like physical activity and monitoring health. Although the treatment has disrupted meal frequency and timing, mindfulness in eating has increased and emotional/stress eating has decreased. Most GLP-1 users have shifted spending toward foods and health needs, often at the expense of social or leisure activities, indicating a focused investment in wellness.



Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024



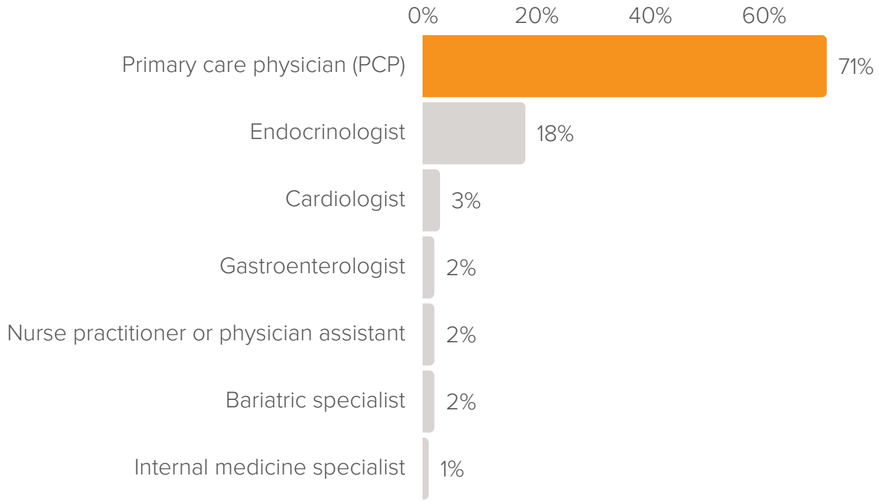
Six

GLP-1 Users and Professional Support

Reaping the benefits of health care professionals' guidance

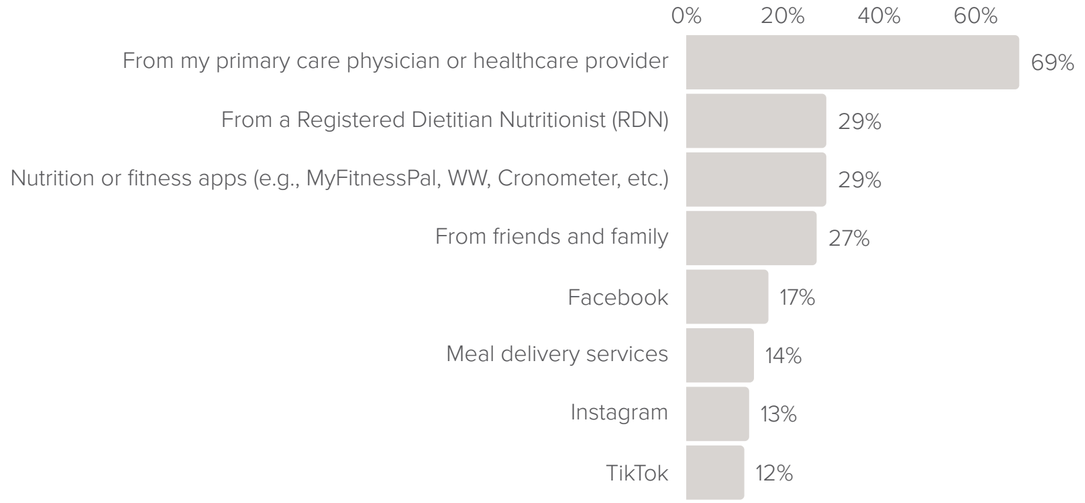
As the main prescribers of GLP-1s, Primary Care Physicians (PCPs) also serve as the main nutrition information resource for users during their GLP-1 journey

71% receive their GLP-1 prescription from their primary care physician



Question: Which healthcare professional prescribed your glucagon-like peptide 1 (GLP-1) agonist medication? (n=720)

69% get their nutrition information from their primary care physician while using GLP-1s

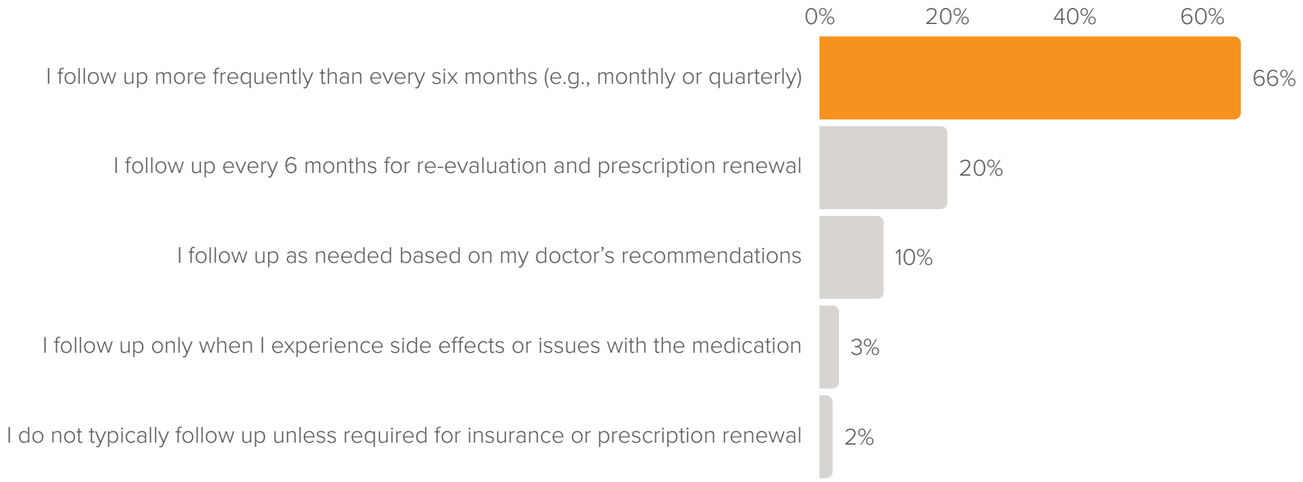


Question: Where do you typically get your nutrition information while using prescription glucagon-like peptide 1 (GLP-1) agonist medication? (n=720)

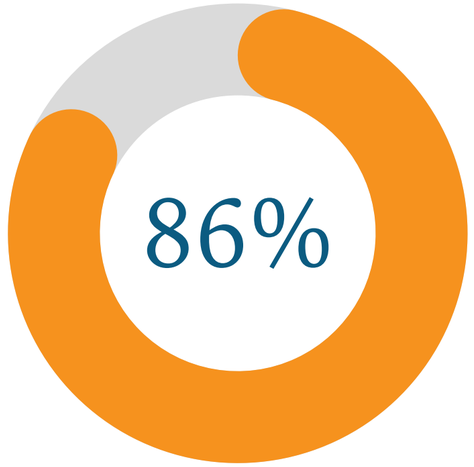
Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

GLP-1 users maintain an ongoing conversation with their PCP regarding their treatment, with nutrition being proactively brought up by PCPs

66% follow up with their primary care physician more often than every six months



Question: After being prescribed a glucagon-like peptide 1 (GLP-1) agonist medication, how often do you follow up with your primary care physician regarding your treatment? (n=720)



of GLP-1 users' PCPs have discussed nutrition or dietary changes as part their GLP-1 treatment

Question: Has your primary care physician ever discussed nutrition or dietary changes with you as part of your treatment plan for prescription of glucagon-like peptide 1 (GLP-1) agonist medication? (n=720)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Yet, a significant portion of GLP-1 users either currently work with RDNs or are interested in doing so

23%

No, I have not worked with an RDN since starting the medication, and I do not plan to

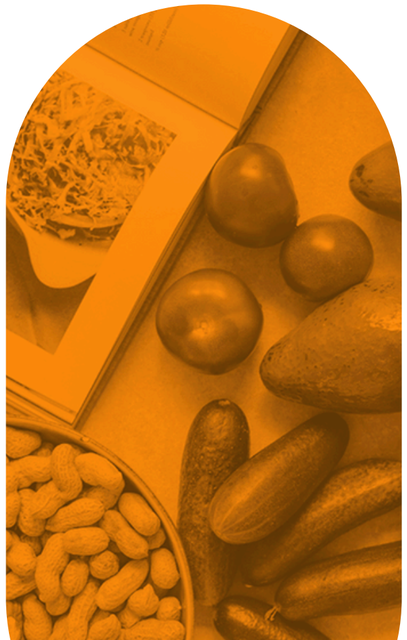


43%

Yes, I have worked with an RDN since starting the medication

34%

No, I have not worked with an RDN since starting the medication, but I would like to



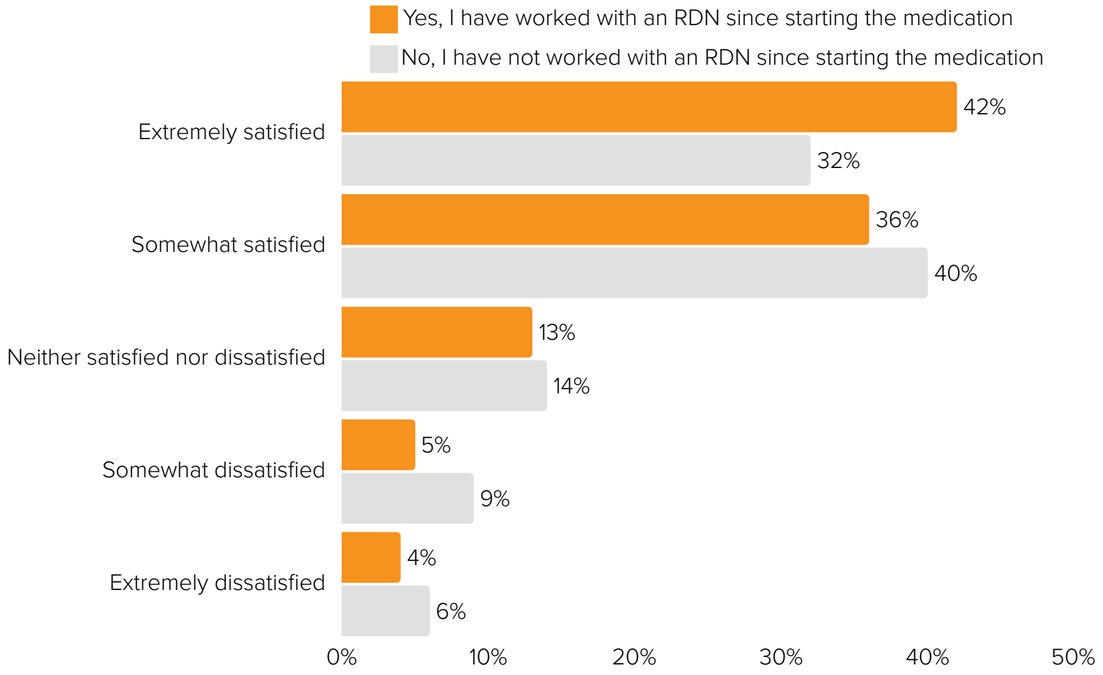


Question: Since starting prescription glucagon-like peptide 1 (GLP-1) agonist medication have you worked with a Registered Dietitian Nutritionist (RDN) regarding your diet? (n=720)

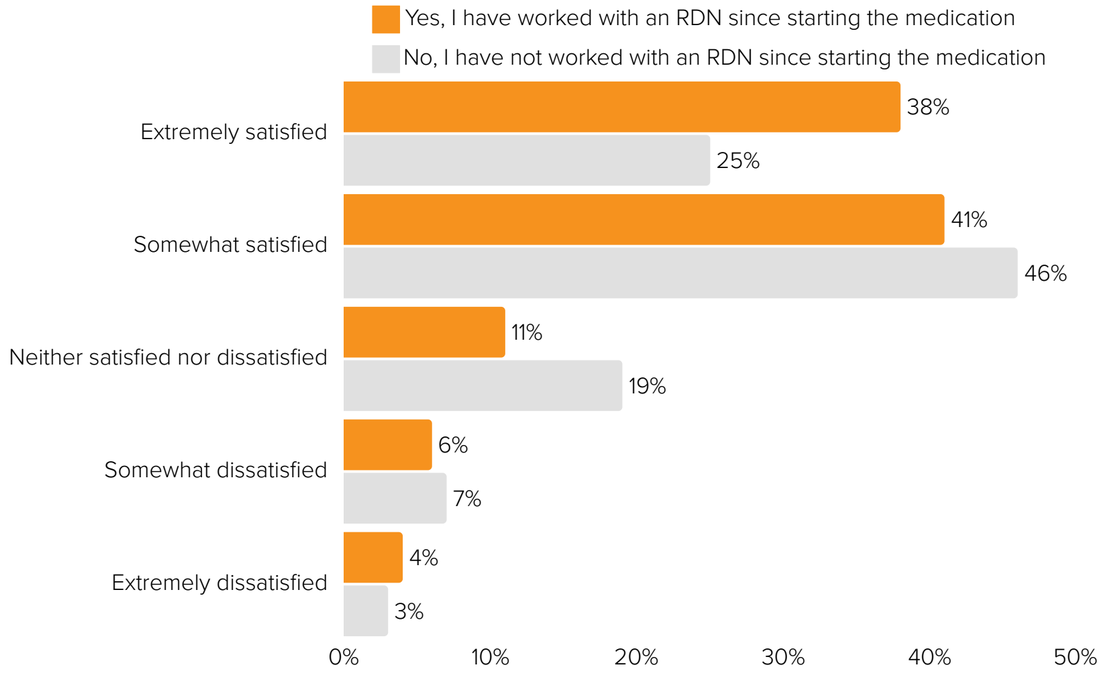
Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Respondents working with an RDN reported higher satisfaction with their results compared to those who did not work with an RDN

42% are extremely satisfied with the impact of the medication on **weight loss goals** (vs. 32%)



38% are extremely satisfied with the impact of the medication on **overall health and well-being** (vs. 25%)



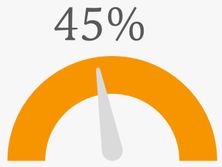
Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

GLP-1 users who work with an RDN demonstrate more commitment to a healthier lifestyle

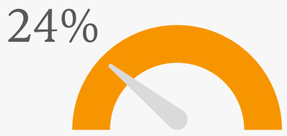
They demonstrate more commitment through how they spend, how they shop, how they eat and what they eat.

	Increase spend on food and grocery	Increase spend on health-related expenditures	Shop online	Shop in specialty health or vitamin stores	Eat more frequent, smaller meals	Are more consistent with meal times	Consume more meal replacements	Consume more protein shakes, powders, and bars
GLP-1 users working with an RDN	47%	36%	41%	29%	58%	47%	27%	26%
GLP-1 users not working with an RDN	30%	17%	28%	8%	44%	23%	3%	2%

GLP-1 users who work with an RDN tend to be male, younger, and more racially and ethnically diverse



are male (vs. 35%)



are 18-34 years old (vs. 9%)



are Black/African-American (vs. 14%)



are Hispanic/Latino (vs. 7%)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024



GLP-1 Users and Professional Support - Section summary

Reaping the benefits of PCPs and RDNs' guidance

Primary care physicians (PCPs) serve as the main resource for GLP-1 users, providing both prescriptions and essential nutrition guidance throughout their treatment. While regular nutrition check-ins with doctors are common, registered dietitians (RDNs) also play an important role, and many users express interest in working with them to further support their health goals.

Respondents guided by RDNs report higher satisfaction with their weight loss results compared to those who did not work with an RDN. With higher spend on food and health expenses, this cohort demonstrates more commitment to a healthier lifestyle and is behind the new positive changes reported in dietary choices and eating habits. Interestingly, fewer move away from convenience and packaged foods, suggesting RDN-guided users present a more nuanced approach to their health transformation.

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024



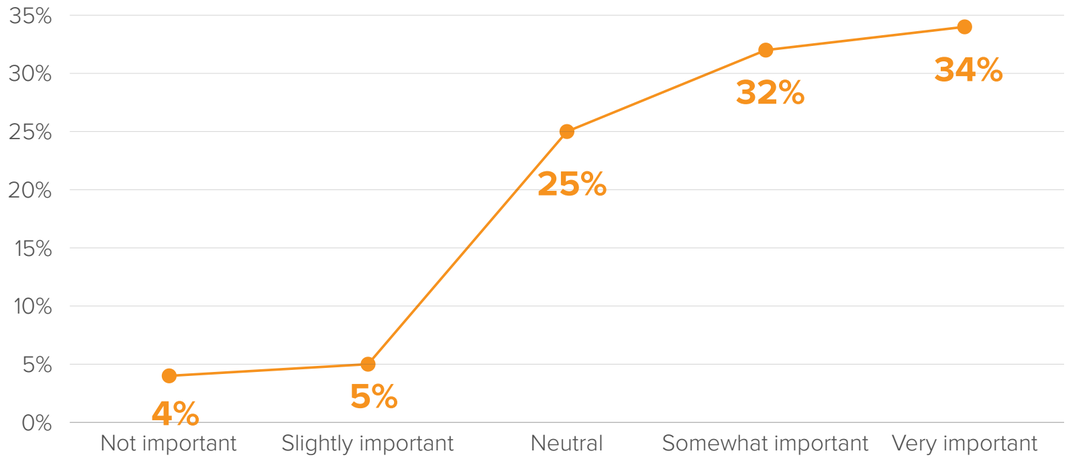
Seven

GLP-1 Users and GLP-1 Companion Products

The importance of nutritional quality and brand trust

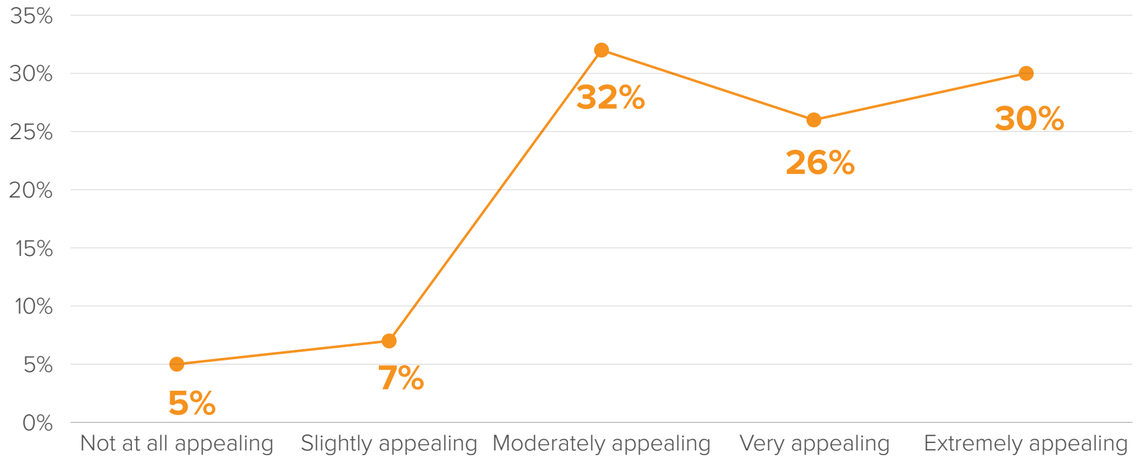
Most GLP-1 users value functional foods and find the idea of GLP-1 companion products appealing

66% find benefits of **functional foods** important to their purchasing decision while taking GLP-1 medication



Question: Thinking of functional foods specifically (e.g., foods with added ingredients like probiotics or fiber to support health), how important are these benefits to your purchasing decision while taking prescription GLP-1 agonist medication? (n=720)

56% find **GLP-1 companion products** appealing or extremely appealing

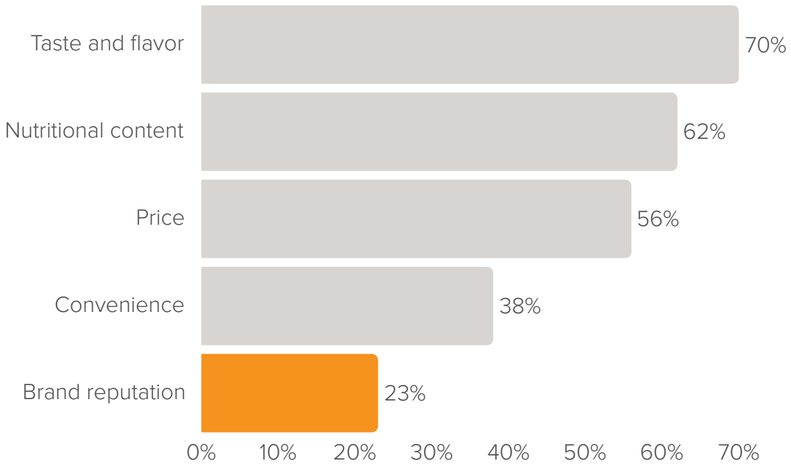


Question: How appealing are food and nutrition products that are labeled or advertised as being formulated specifically for individuals taking prescription GLP-1 agonist medication? (n=720)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

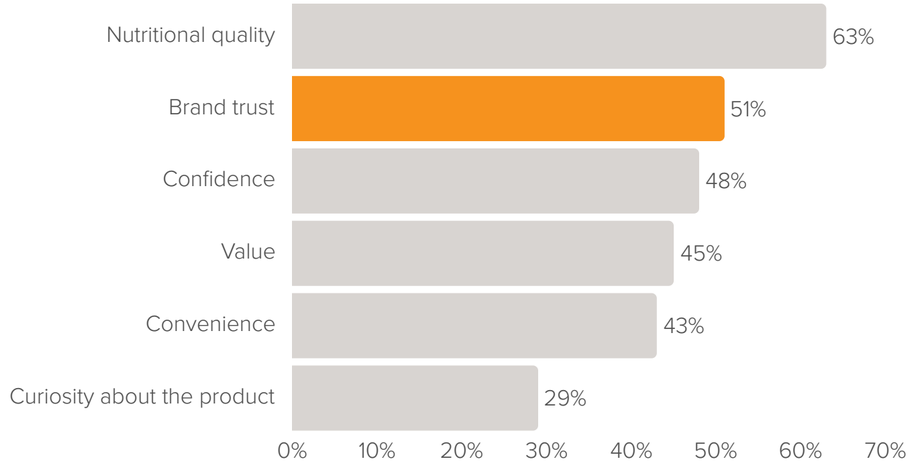
GLP-1 users may not prioritize brand reputation when choosing foods, but brand trust becomes a more important factor when choosing GLP-1 companion products (along with nutritional quality)

Important factors when choosing foods, beverages, or meal replacements



Question: When choosing foods, beverages, or meal replacements while using a prescription GLP-1 agonist medication, which of the following factors are most important to you? (n=720)

Appealing attributes for GLP-1 companion products



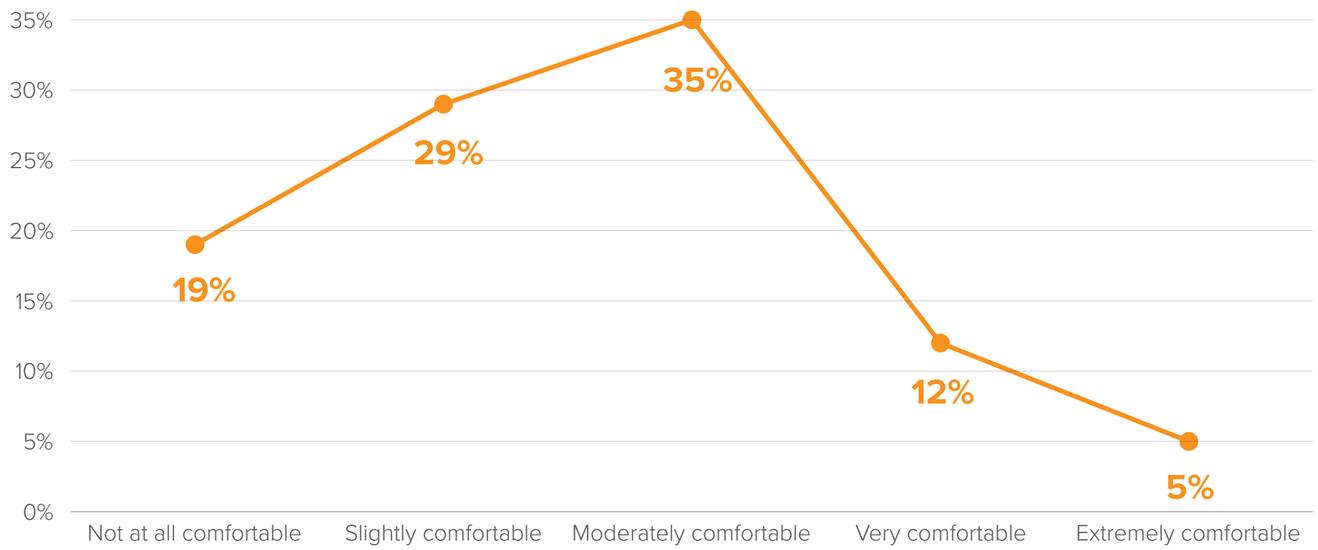
Question: What factors or attributes of specifically labeled GLP-1 products do you find most interesting or appealing? (n=400; 44% filtered out)

RDNs believe the ideal attributes of GLP-1 companion products to be Nutritional quality (87%), Value (72%), and Confidence (66%).

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Few RDNs are very comfortable recommending GLP-1 companion products

17% are very to extremely comfortable recommending GLP-1 companion products

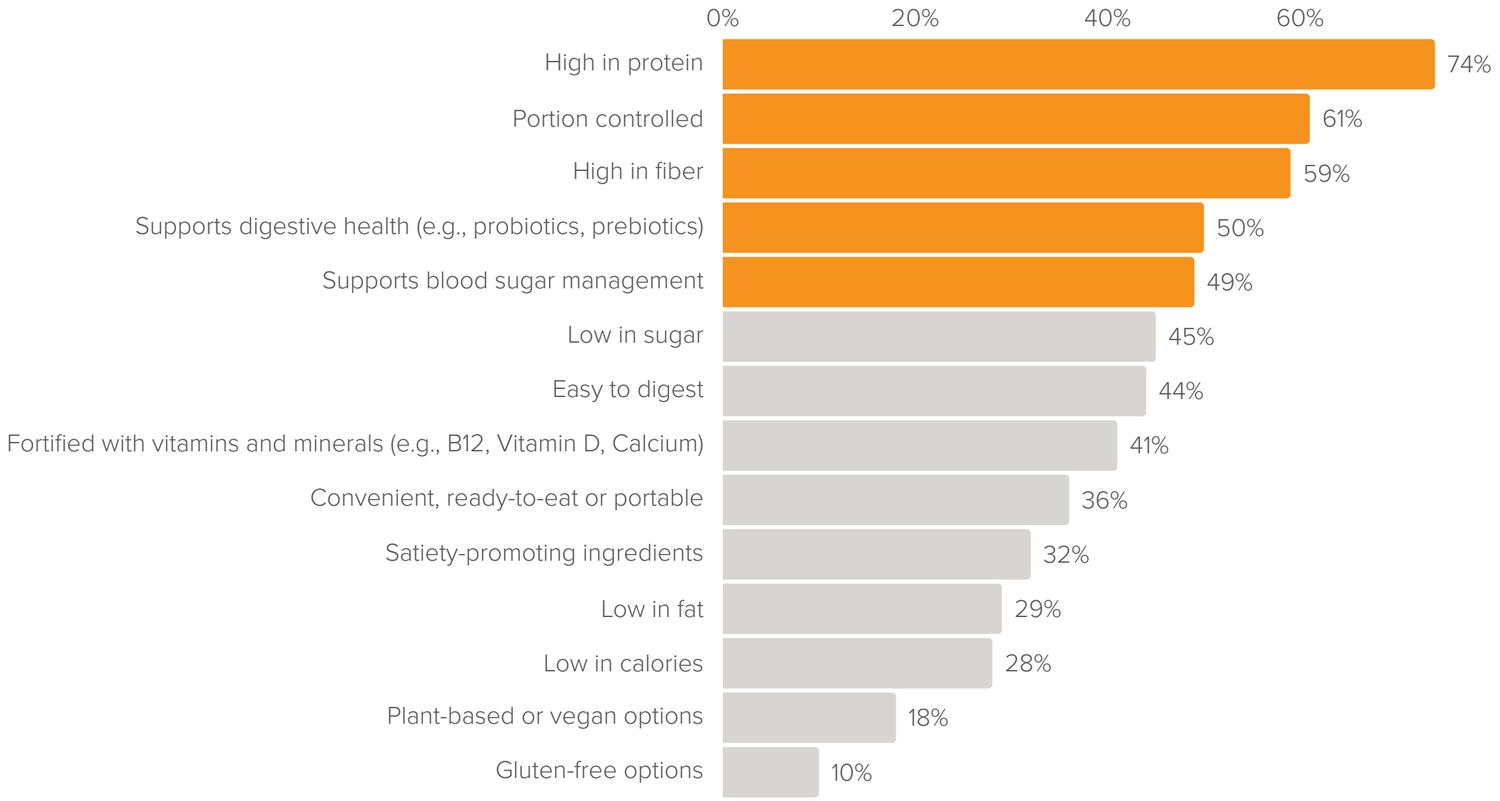


Question: As a dietitian, do you feel comfortable recommending foods or nutrition supplements that are labeled or marketed as being formulated specifically for people taking GLP-1 agonist medications? (n=423)



Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

According to RDNs, GLP-1 companion products need to be high in protein and fiber and portion controlled

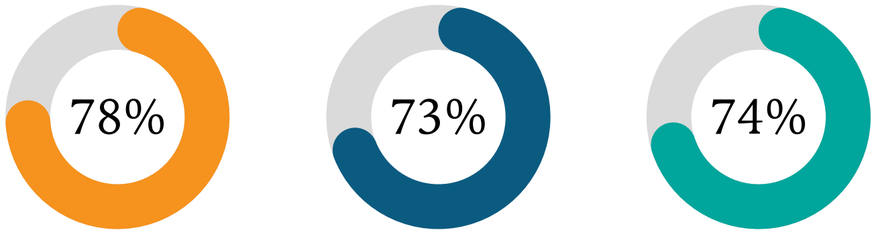


Question: What specific nutrients, features, or benefits do you consider essential for products designed to accompany prescription GLP-1 agonist medications? (n=423)

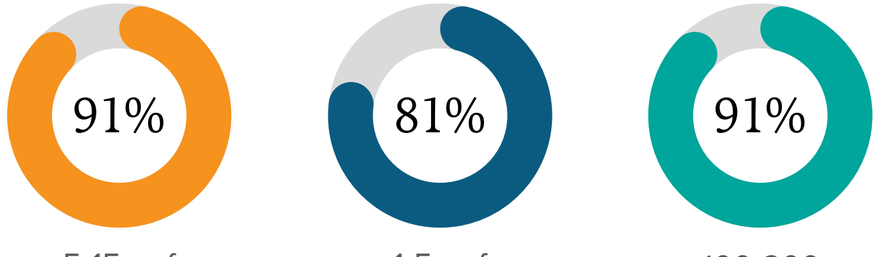
Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

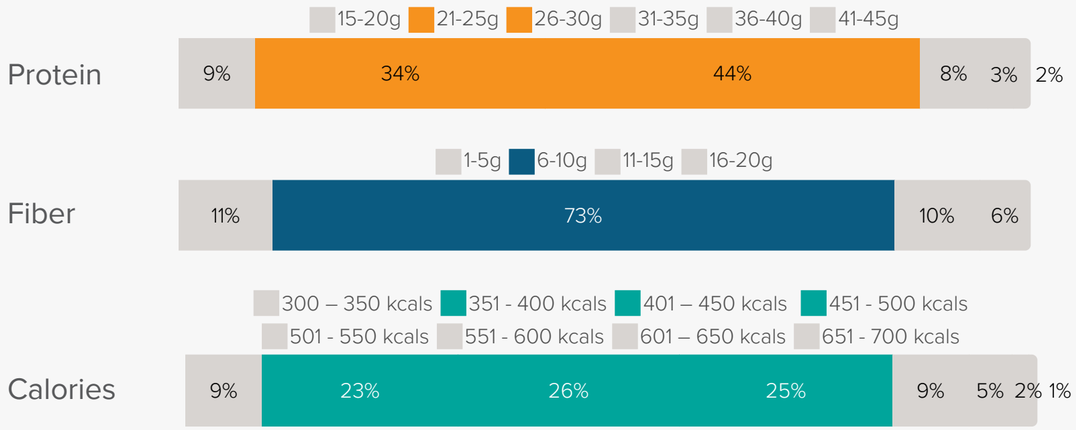
Most RDNs agree on the appropriate range of protein, fiber, and calories for traditional meals and snacks for GLP-1 users

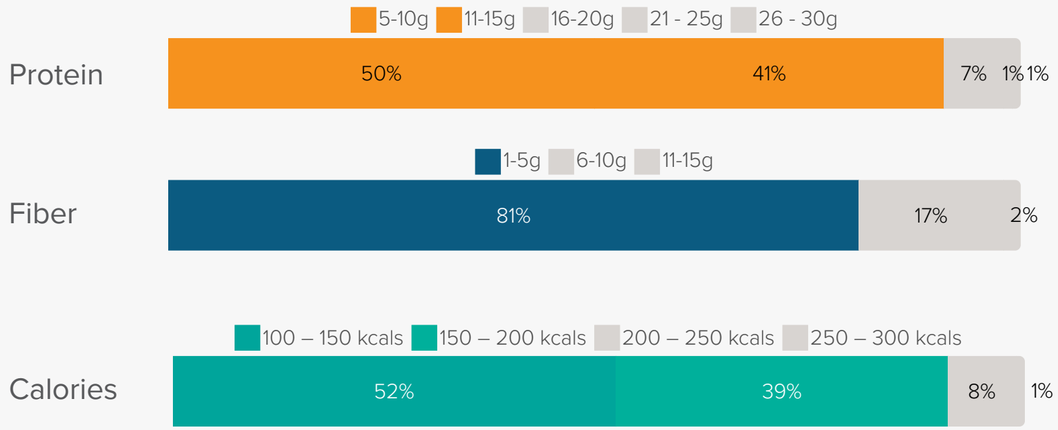
Traditional meals



Snacks





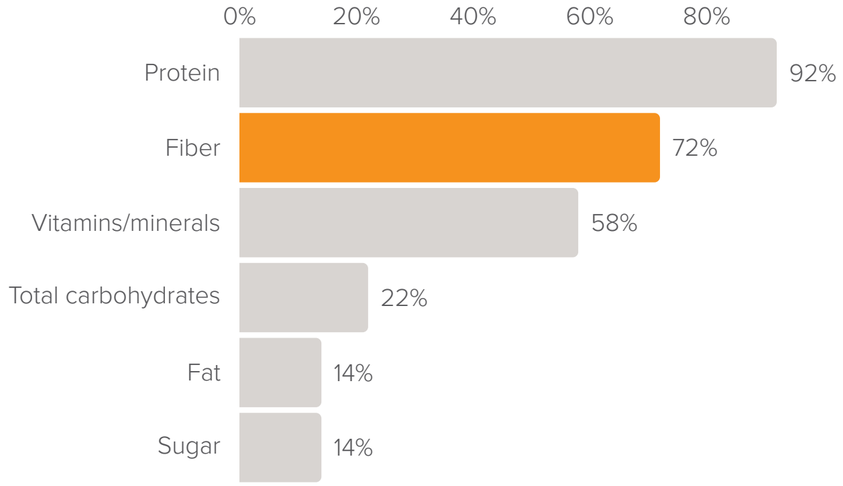


Question: When thinking specifically about a traditional meal/snacks, what range of protein/fiber/calories do you recommend for your GLP-1 agonist patients (on average)? (n=423)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

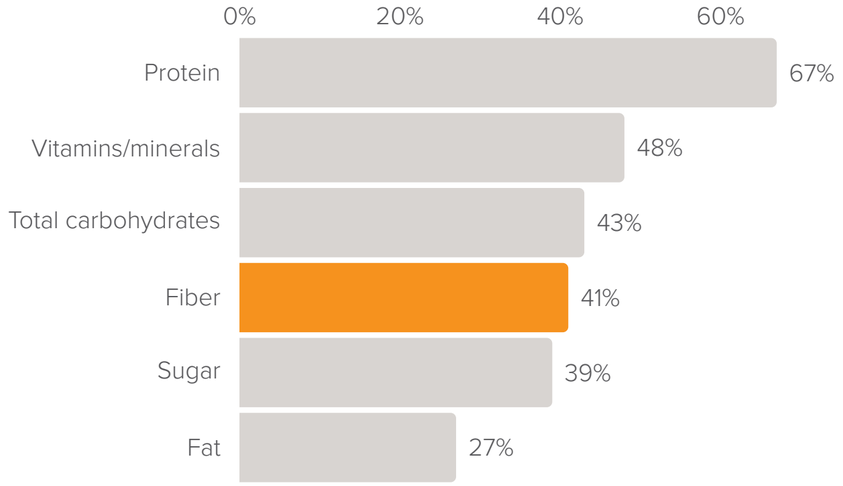
While protein and vitamins/minerals are top of mind for GLP-1 users, there is an opportunity to elevate the importance of fiber in their product choices

Most important nutrients according to RDNs



Question: Which of the following nutrients do you think are most important to prioritize for clients/patients taking prescription GLP-1 agonist medications? (n=423)

Most important nutrients according to GLP-1 users



Question: When selecting foods, which of the following nutrients is most important to you while taking your prescription GLP-1 agonist medication? (n=720)

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

GLP-1 Users and GLP-1 Companion Products - Section summary

The importance of nutritional quality and brand trust

Most GLP-1 users appreciate functional foods and are attracted to the concept of GLP-1 companion products. Although they don’t prioritize brand reputation in their food choices, brand trust and nutritional quality become crucial when selecting GLP-1 companion products.

However, many RDNs express discomfort in recommending them, emphasizing that these products should be high in protein and fiber while also being portion-controlled.

While protein and vitamins are currently the main focus for GLP-1 users, there is a strategic opportunity to raise awareness of fiber's importance in their dietary choices, potentially enhancing the appeal and effectiveness of GLP-1 companion products.



Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024



Eight

Recommendations & Foresights

Hearing from GLP-1 users and Registered Dietitian Nutritionists has helped further determine the need for:

Product innovation

Design and introduce new food and beverage products that meet the specific dietary needs of GLP-1 medication users, supporting their weight management goals

Portfolio transformation and positioning

Transform existing product portfolios to align with GLP-1 medication use and increasing demand for health-conscious options

Engagement with HCPs to support GLP-1 users

Collaborate with healthcare professionals, such as dietitians and nutritionists, to endorse products as suitable options for GLP-1 medication users, and drive brand trust and loyalty



Food and drink manufacturers have a prime opportunity to adapt and innovate their portfolio and products

Based on our research we can expect users of GLP-1 medications to seek out brands they trust to provide superior nutritional quality:

PROTEIN- & FIBER-RICH **SUPPORT DIGESTIVE HEALTH** **PACKED WITH VITAMINS/MINERALS** **SMALLER PORTION SIZES**

Product Innovation & Portfolio Transformation

Food for thought

Launch or revamp existing product lines to better suit the health-conscious consumer influenced by GLP-1 medication trends and other headwinds in food and health.



Formulate products with zero or minimal added sugars; avoid overuse of artificial sweeteners



As GLP-1 users move away from alcohol, formulate no-alcohol alternatives and/or consider adding functional or supplemental ingredients to existing drinks



Consider bite-sized additions of your popular products to address the trend of reduced portion sizes without consumers having to compromise on their favorite treats



Reformulate the macronutrient content of products to increase protein levels and/or include additional fiber

Opportunities beyond product innovation

1. Personalized Nutrition – Dietitian support by design

What we found out: GLP-1 users working with an RDN are reaping more benefits from the medication and adopting food and health behaviors that will have a more lasting impact on their weight management and general health and well-being.

Action: *It is critical to encourage GLP-1 users to work with an RDN. Tailored nutritional plans based on patient needs can aid in long-term weight maintenance and better health outcomes.*

2. Supplementation - Essential against malnutrition

What we found out: Beyond the 3P diet (Protein, Portion Control, Plenty of Water), GLP-1 users, especially those not working with an RDN, present a risk of malnutrition and inadequate intake of protein, fiber, and micronutrients.

Action: *In the absence of nutritional guidelines, supplementation plays a critical role in ensuring GLP-1 users consume optimal amounts of micronutrients and in helping alleviate common side effects.*

3. Retail Dietitians - Ideal basket-builders for the GLP-1 Shopper

What we found out: GLP-1 consumers working with RDNs spend more money on food than those who do not.

Action: *Retail grocery can win back lost GLP-1 dollars by driving shopper loyalty via comprehensive services such as:*

- ✓ Leveraging retail RDNs to create GLP-1 nutrition counseling programs
- ✓ Medical Nutrition Therapy as a reimbursable service via Medicaid, Medicare, and insurance
- ✓ Retail RDN & Pharmacy collaborations, such as educational events and messaging
- ✓ Dietitian-created GLP-1 shopping guides/companions

Action: *Leverage creative & strategic merchandising tactics to meet the needs of the GLP-1 shopper, while providing broad wellness appeal to other health-minded shoppers.*

- ✓ Perform category reviews to ensure the relevance of offering vitamins, supplements, and functional foods to the GLP-1 audience
- ✓ Catchy promotional events focused on GLP-1 friendly foods, without the label or stigma. Examples:
  - **FIT-TO-GO** – Protein-packed grab & go snacks, meals, and meal replacements
  - **Keep it Glowing** – Supplements for optimal skin and hair health

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

How Eat Well Global can help in your GLP-1 journey

Today

Tomorrow

Monitoring & Insights

Product Development

Product Launch and Beyond

Opportunity for GLP-1 companion products confirmed

It is now time for product reformulation, portion size change, new products, acquisitions, positioning/repositioning, revised communications, and Key Opinion Leader engagement

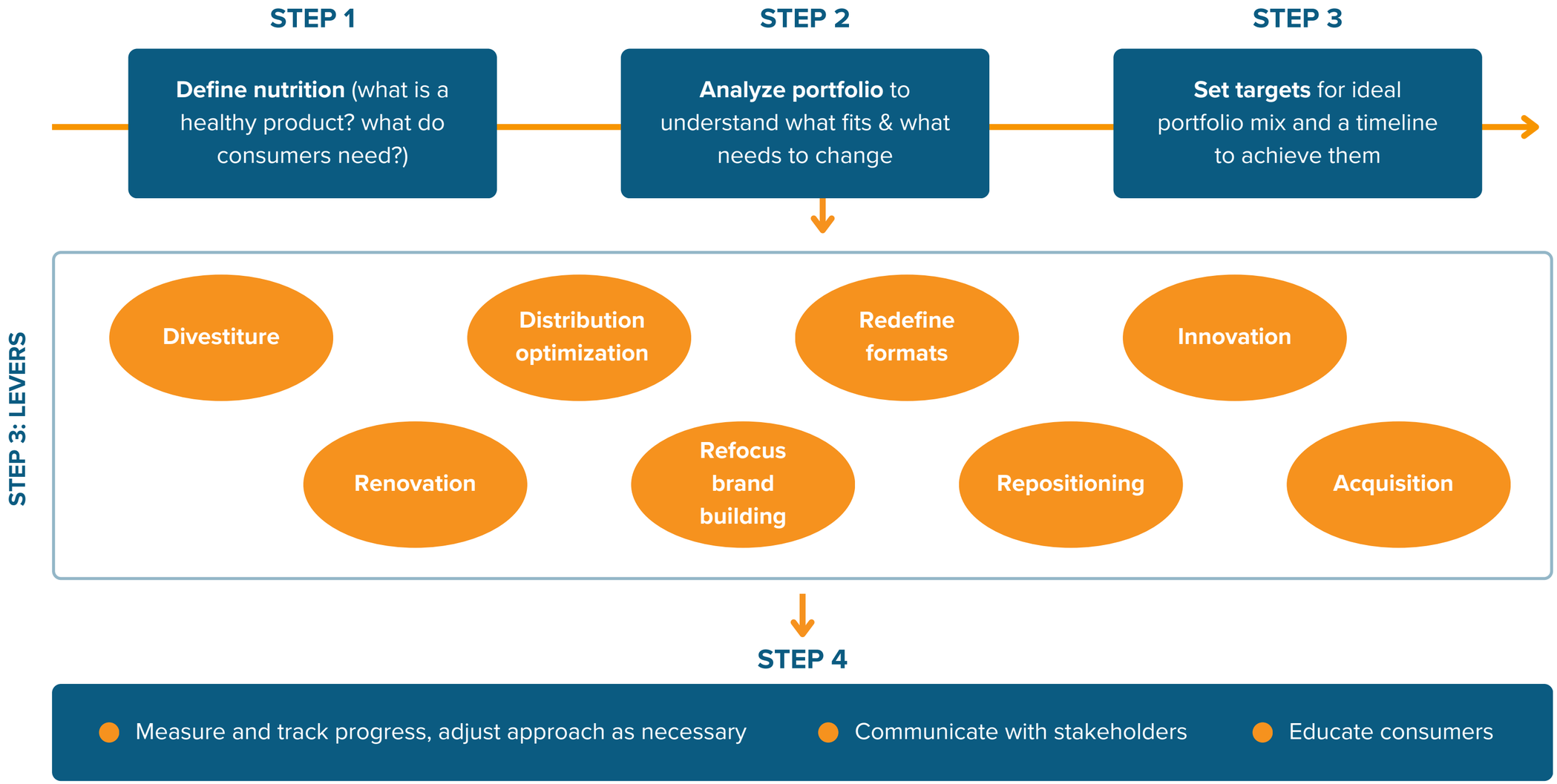
- Understand the impact of GLP-1 on your portfolio
- Seize the opportunity

- Evaluation of current portfolio to address appropriateness/ alignment to GLP-1 consumer needs/wants

- Message map development for engagement with GLP-1 KOLs & HCPs
- Strategic partnership mapping

Eat Well Global, US GLP-1 users online survey, September 2024, and US RDN online survey, October 2024

Eat Well Global's model for action to transform the portfolio



We've been helping food and drink manufacturers adapt to their new environment

Nutrition guidelines development

This multinational foodservice client needed a set of credible, rational nutrition guidelines, based on a nutrient profiling scheme to help classify products and guide innovation and renovation activities.

We provided strategic council and technical input on nutrition guideline development and associated communication tools, and developed and finalized a set of nutrition guidelines for all product categories.

The impact: Fit-for-purpose nutrition guidelines framework intended to guide innovation, renovation, and nutrition commitments. Guidelines covered foodservice and packaged foods. In 2021, the client launched their proprietary Food Nutrition Profiling System covering both food service and packaged foods to ensure the food products developed meet the requirements for nutrition quality, thereby contributing to a healthy diet.



We drive pivotal business strategy decisions

Credible strategy shift from indulgence to well-being

A large global CPG client wanted to make a pivotal business change by rethinking purpose towards a holistic well-being strategy.

Eat Well Global provided an “outside-in” expert analysis of the business segments through the broad lens of holistic well-being. We created practical tools and a narrative to serve together as the company’s north star moving forward.

Insights taken from:

- **Competitors**
- **KOL Interviews**
- **Global Health Landscape**
- **Portfolio Analysis**
- **Stakeholder Workshops**

The result:
Designed a brand-new, science-based strategy centred on well-being for widescale corporate support and impactful change across the business.



We empower brands with science-driven portfolio frameworks for market leadership

Defining brand's nutritional edge in the juice revolution

Our goal was to help establish a fast-growing manufacturer as a leader in the juice revolution by crystallizing a distinctive and science-based "nutritional point-of-view" that informs its current and future product portfolio and communications.

Our collaborative approach, which included desk research of public health guidance, scientific research, a comprehensive nutrition analysis, and live workshops with the client, yielded the development of:

- Portfolio-wide non-negotiables to define the brand
- Proposed segment-specific identities and nutritional guardrails
- Messaging recommendations to further drive credibility

The result: A cohesive nutrition framework rooted in strong science-backed claims and relevant nutrients of public health concern to govern the existing portfolio and future innovations.



Delightful Mom Food

Thank you

Have questions? Get in touch

Find out what Eat Well Global can do for you



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