

The Consumer Shift Reshaping How America Eats & Drinks

New research from Ideally reveals GLP-1s are changing how America shops, far beyond the people taking them.

ideally

Ideally Investigates: GLP-1 is based on a nationally representative study of 2,184 US adults conducted on Ideally in May 2026.



KATHY LUBNER,
US RESEARCH LEAD | IDEALLY



For decades, food and beverage companies have competed on a single assumption: consumers will always have room for one more bite.

GLP-1 medications challenge that assumption. When appetite changes, so does how people relate to food. Shopping baskets change. Eating occasions shift. Categories built on impulse, grazing and supersized portions come under pressure, while products that deliver protein, satiety and value earn a bigger place in people's lives.

Most conversations about GLP-1s start and end with prescription numbers. I think that's looking in the wrong place. The real story is in how people are rethinking food: what they want, what they buy, what feels worth eating. And that shift reaches well beyond the people on the medication, touching households, shopping routines and social occasions long before it shows up in category sales.

That's why this research listens to what consumers think, feel and do, rather than counting prescriptions.

What emerges is a more selective consumer. Protein matters more. Portions are smaller. Impulse purchases get harder to justify. Every bite has to earn its place.

For brands, that's both a challenge and an opportunity. Many of the products consumers are drawn to already exist. The task isn't always to invent something new. Often it's to recognize how priorities are shifting, understand which occasions are growing or shrinking, and adapt packaging, positioning and communication to match.

The companies that lead the next decade won't be the ones that react once the numbers move. They'll be the ones that treat changing appetite as one of the most important forces reshaping food and beverage today.

I hope this report helps you see that shift a little earlier. We'll continue following these changes as GLP-1s reshape consumer behavior across categories.

The GLP-1 Audience Is 6x Bigger Than You Think

Six in ten Americans now sit inside the GLP-1 footprint. Most have never picked up a prescription.

About one in ten Americans currently takes a GLP-1. Another 8% have taken one before, almost a quarter would consider taking one, and one in six lives, shops or socializes alongside someone who does. Together, nearly 60% of Americans now sit inside the GLP-1 footprint.

Most conversations focus on prescriptions. The bigger story is behavior. GLP-1s are changing how people eat, shop and drink, and those habits spread well beyond the people taking the medication.

This report looks beyond the prescription to explore how changing appetite is reshaping consumer behavior across food, snacking and alcohol, and what that means for brands built around appetite.

INSIDE THE GLP-1 FOOTPRINT	NO EXPOSURE TO GLP-1
59.7%	40.3%

GLP-1 footprint breakdown:

CURRENT USERS	10.4%
FORMER USERS	8%
PEOPLE CONSIDERING USE	24%
NON-USERS EXPOSED TO SOMEONE TAKING A GLP-1	17.3%

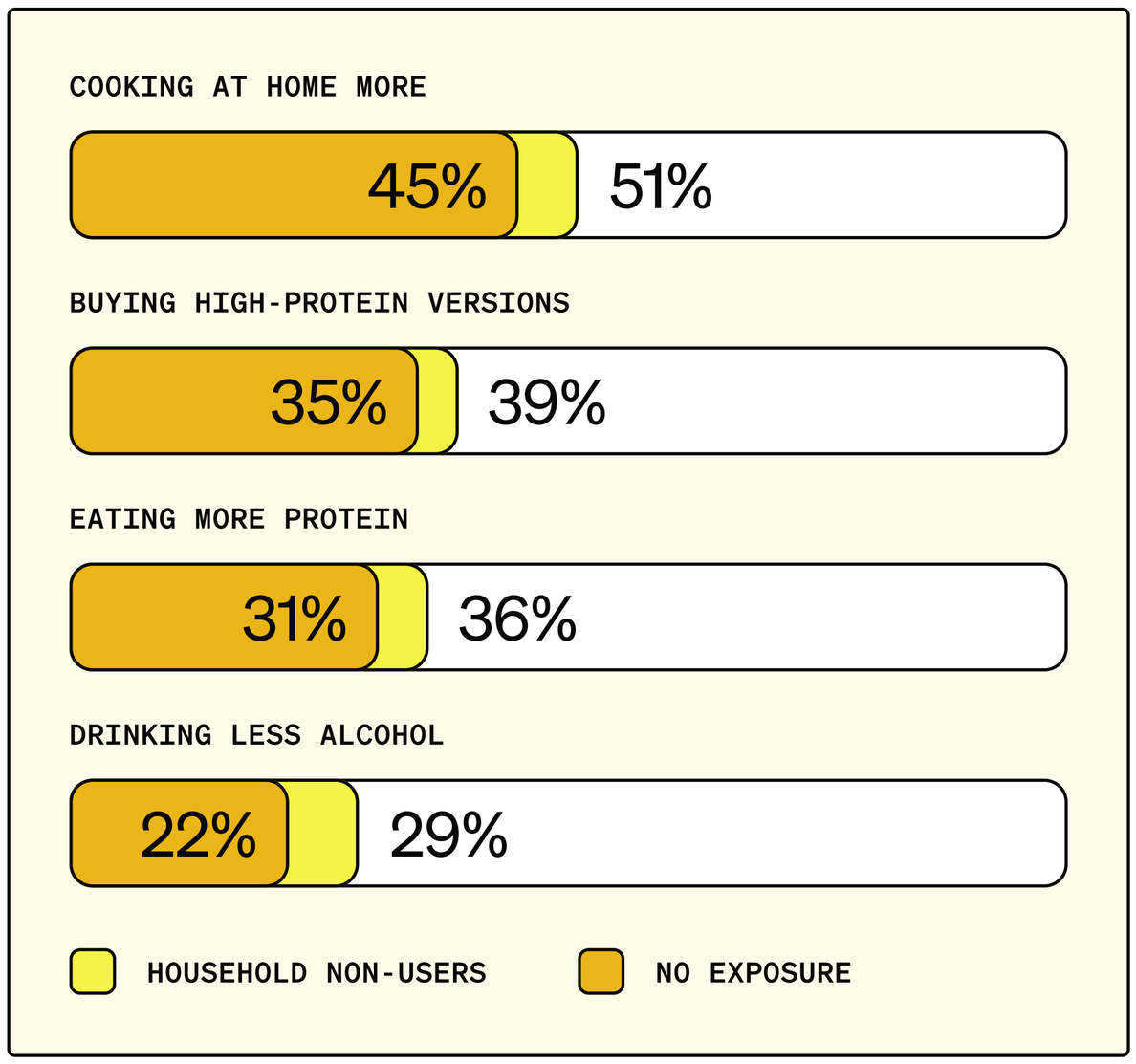
The impact extends beyond the individual

The most important number in this study isn't the percentage of Americans taking a GLP-1. It's the percentage living with someone who is.

One in seven Americans now lives in a household with a GLP-1 user. That matters because eating is rarely an individual behavior. Households share grocery shops, meal planning and eating occasions, meaning one person's changing appetite often influences everyone else's.

The pattern is already visible. People living with a GLP-1 user are more likely to buy high-protein foods, cook at home and drink less alcohol than those with no exposure. Many are adopting the same habits without ever taking the medication themselves.

Asked what was changing in their household, respondents spoke about eating more protein, cutting sugar and choosing less processed food. Few mentioned GLP-1s directly. They described new habits, not the thing that started them.



Directional, household cell n=192. These cells are smaller, so hold the basket numbers as directional. They all lean the same way, and the alcohol pullback is the firmest of them.



People living with a user are:



3.3x

MORE LIKELY TO SEE NOTICEABLE WEIGHT LOSS AMONG FRIENDS AND FAMILY



3x

MORE LIKELY TO REPORT MORE CONVERSATIONS ABOUT WEIGHT



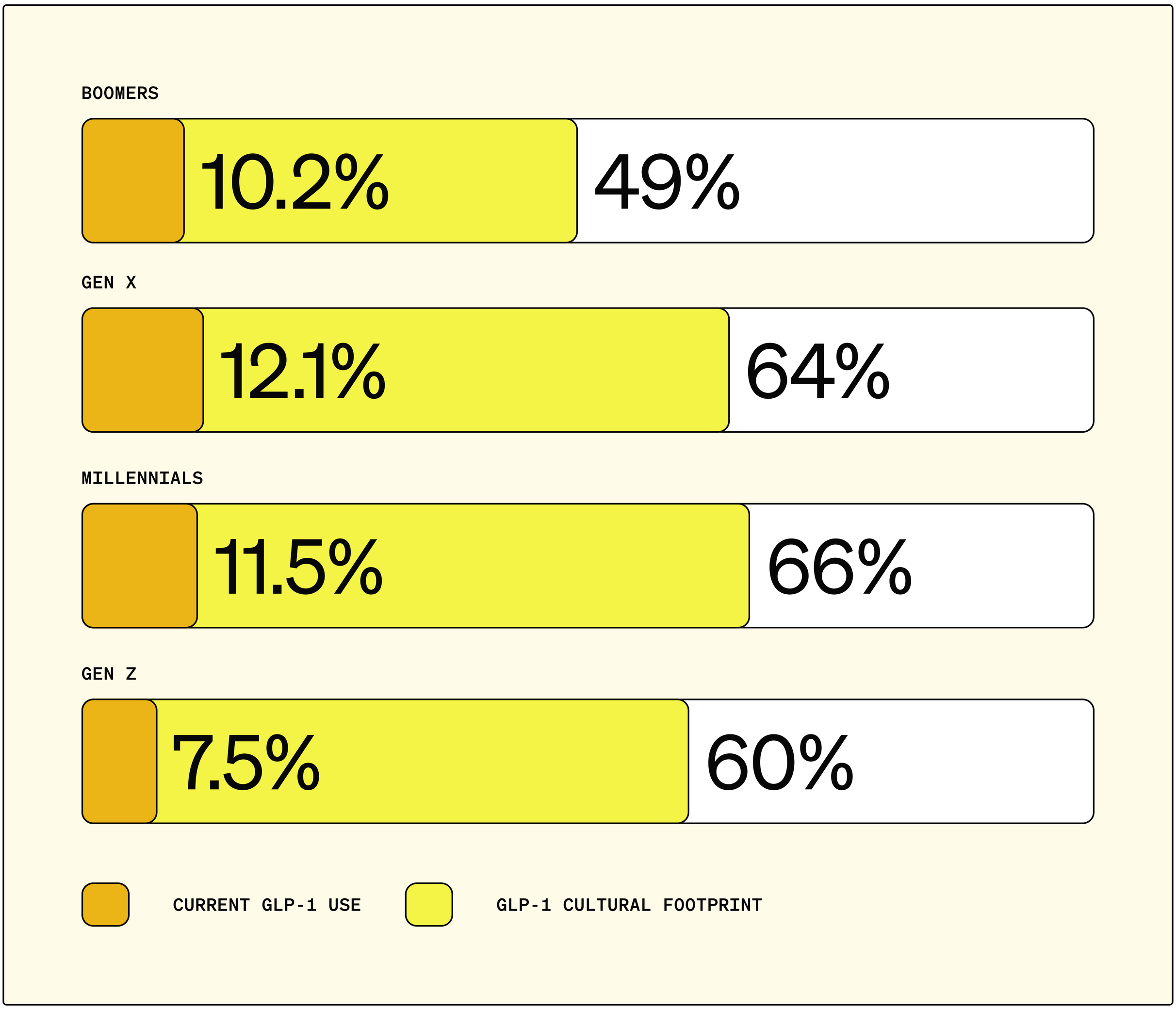
2.8x

MORE LIKELY TO OBSERVE SMALLER PORTION SIZES



1.8x

MORE LIKELY TO NOTICE REDUCED ALCOHOL CONSUMPTION



Younger consumers are absorbing the shift fastest

GLP-1 use skews towards older consumers. The behavioral footprint skews younger.

Current use is highest among Gen X (12.1%) and Millennials (11.5%). But it's Millennials (66%) and Gen Z (60%) who are most likely to sit inside the wider GLP-1 footprint through family, friends and social circles.

That distinction matters. Younger consumers are more likely to be living with a parent on the medication, shopping for a household where eating habits are changing, or watching those behaviors become normal among friends.

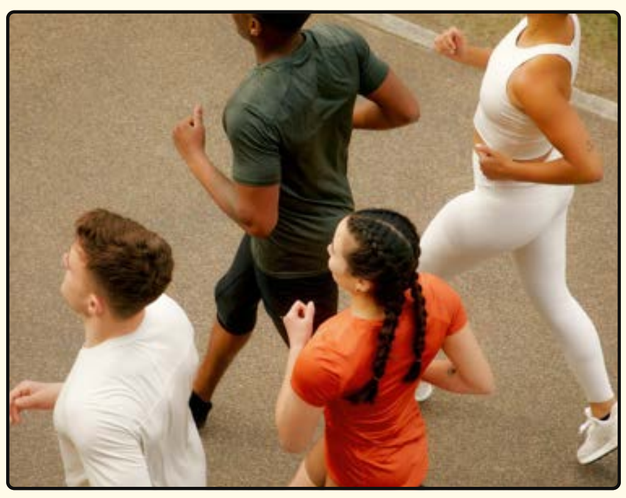
The next decade won't be shaped solely by the people taking GLP-1s. It will be shaped by the generation growing up around them.





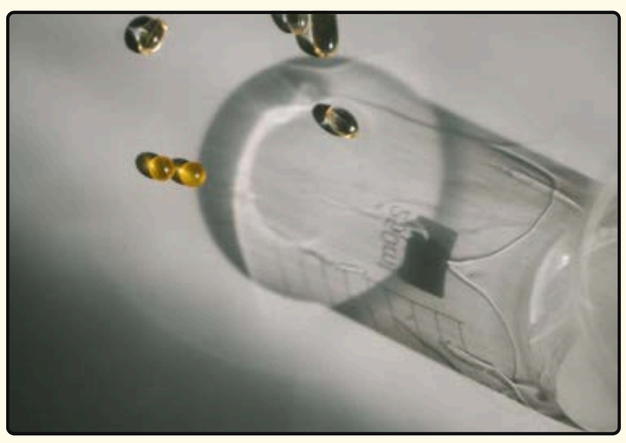
Desire is flat, access isn't.

Desire for a GLP-1 is flat across income, but access isn't. Roughly a quarter of every bracket would take one if they could, yet use climbs from 7% in lower-middle brackets to 14.5% at the top. Among lapsed considerers, 41% say the drug creates a divide between those who can afford it and those who can't, against 19% of current users. That leaves a large group on the same path without the drug, pushed there by cost of living, and the product that reads as both GLP-1-friendly and budget-friendly does double duty.



Longevity over vanity.

The popular story says this category runs on vanity and celebrity. The data says something else. Asked why they would take a GLP-1, considerers name living a longer, healthier life (35%), medical reasons (29%), energy (26%), curbing cravings (24%), and mental health and self-esteem (22%). Looking better in photos comes in at 14%. Keeping up with friends and family, 6%.



The doctor, not the influencer.

The category gets talked about through Ozempic ads and influencer culture. The decision actually sits in a clinic. The single biggest influence on whether someone takes a GLP-1 is their doctor, named by 53% of users and considerers. Family follows at 27%, friends at 20%, a partner at 18%. Social media is 15%. Celebrities, 5%.



Coming off the drug doesn't undo the habit.

Around 8% of adults have used GLP-1s and stopped, driven mainly by cost, side effects or reaching goal weight. Some effects persist: a third still feel full on smaller portions, a third report reduced food noise, and lower interest in alcohol holds at 24%, similar to current users. The new habits outlive the prescription, which challenges the idea of a clean snap-back in spending once people come off.

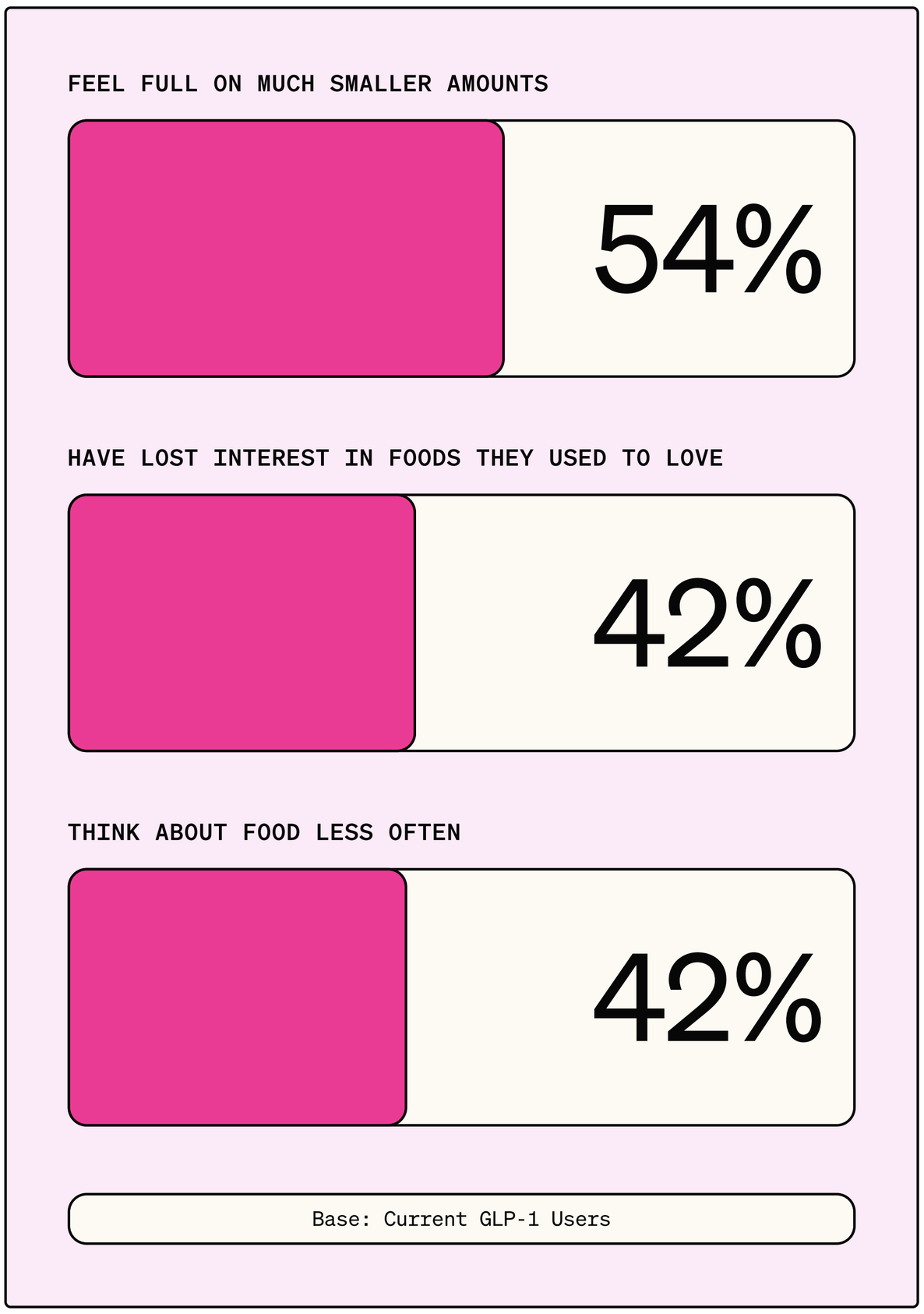
The Snack Aisle Is The First Battleground

GLP-1s reduce appetite. Snacks are the first category to feel the impact.

No category depends more on appetite than snacks.

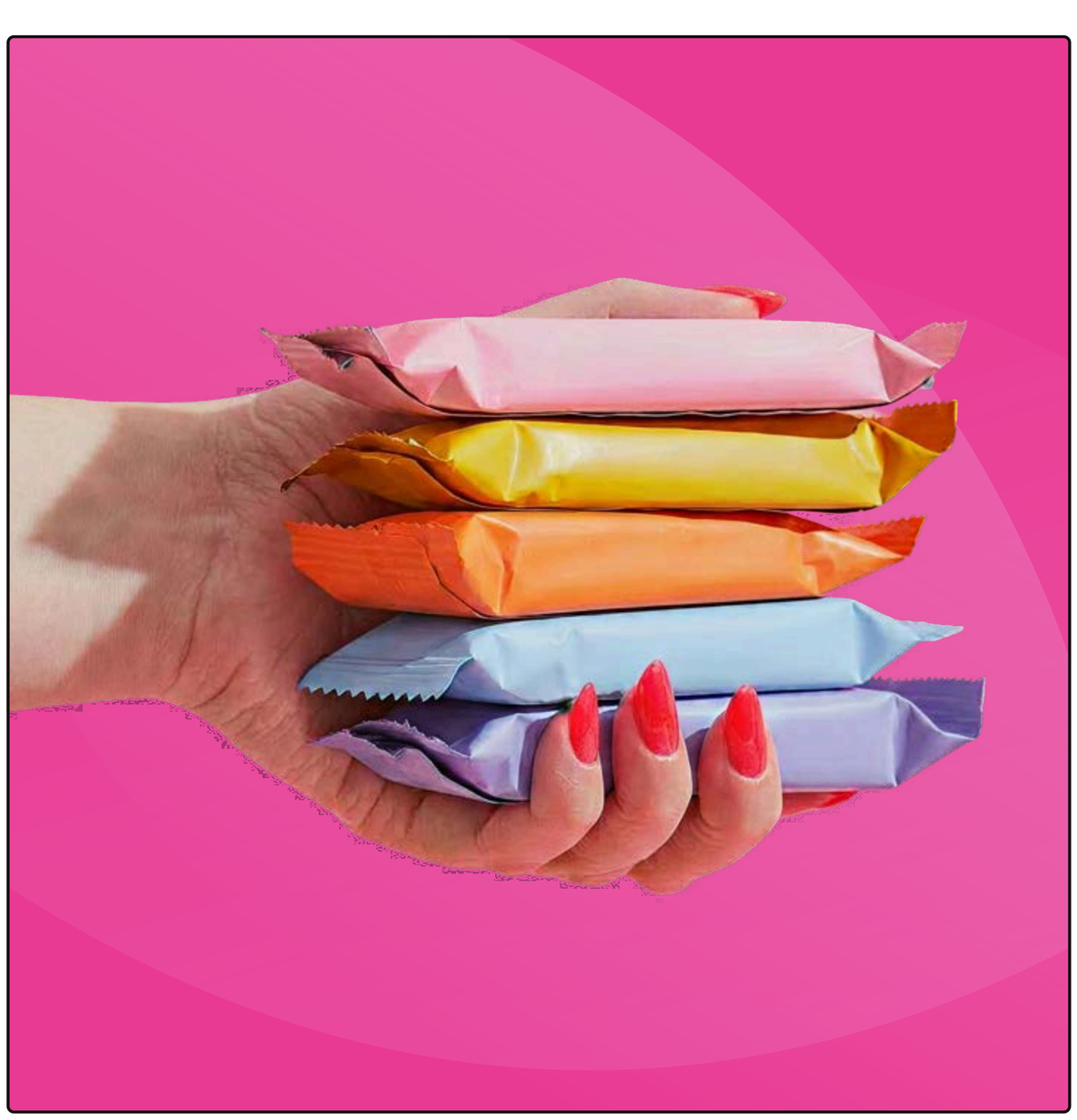
For decades, confectionery, chips and convenience snacks have competed for the same behaviors: impulse purchases, between-meal eating and the promise of one more bite. GLP-1s weaken each of those.

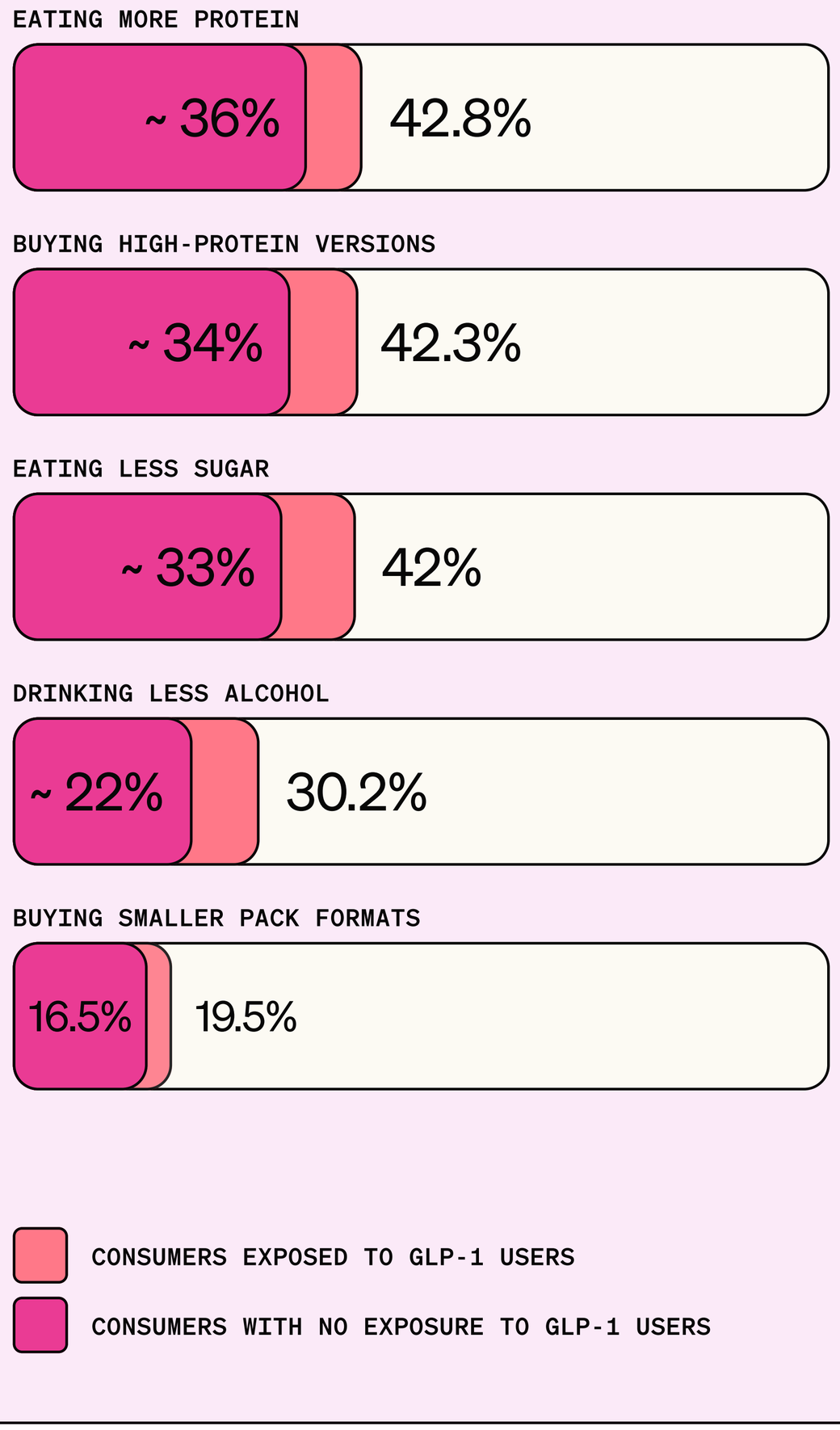
More than half of people taking a GLP-1 say they now feel full on much smaller portions. Four in ten have lost interest in foods they used to love, while another four in ten say they simply think about food less often.



As appetite changes, the products winning attention are remarkably familiar.

People living alongside a GLP-1 user are already more likely to eat more protein, buy high-protein versions, reduce sugar and drink less alcohol. These are subtle shifts today, but they point in the same direction: snacks increasingly need to deliver nutrition, satiety or a clear functional benefit to justify a place in the basket.





The market is already adapting.

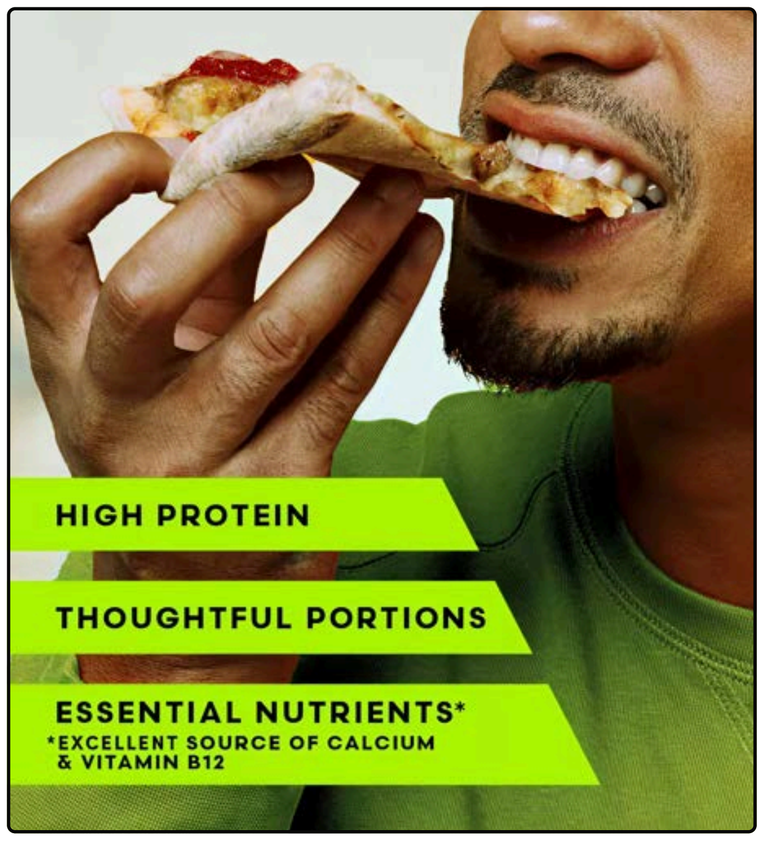
PepsiCo is testing mini-meal formats through Sabra and Siete.

Danone launched Oikos Fusion, a 23g protein drink aimed at GLP-1 consumers.

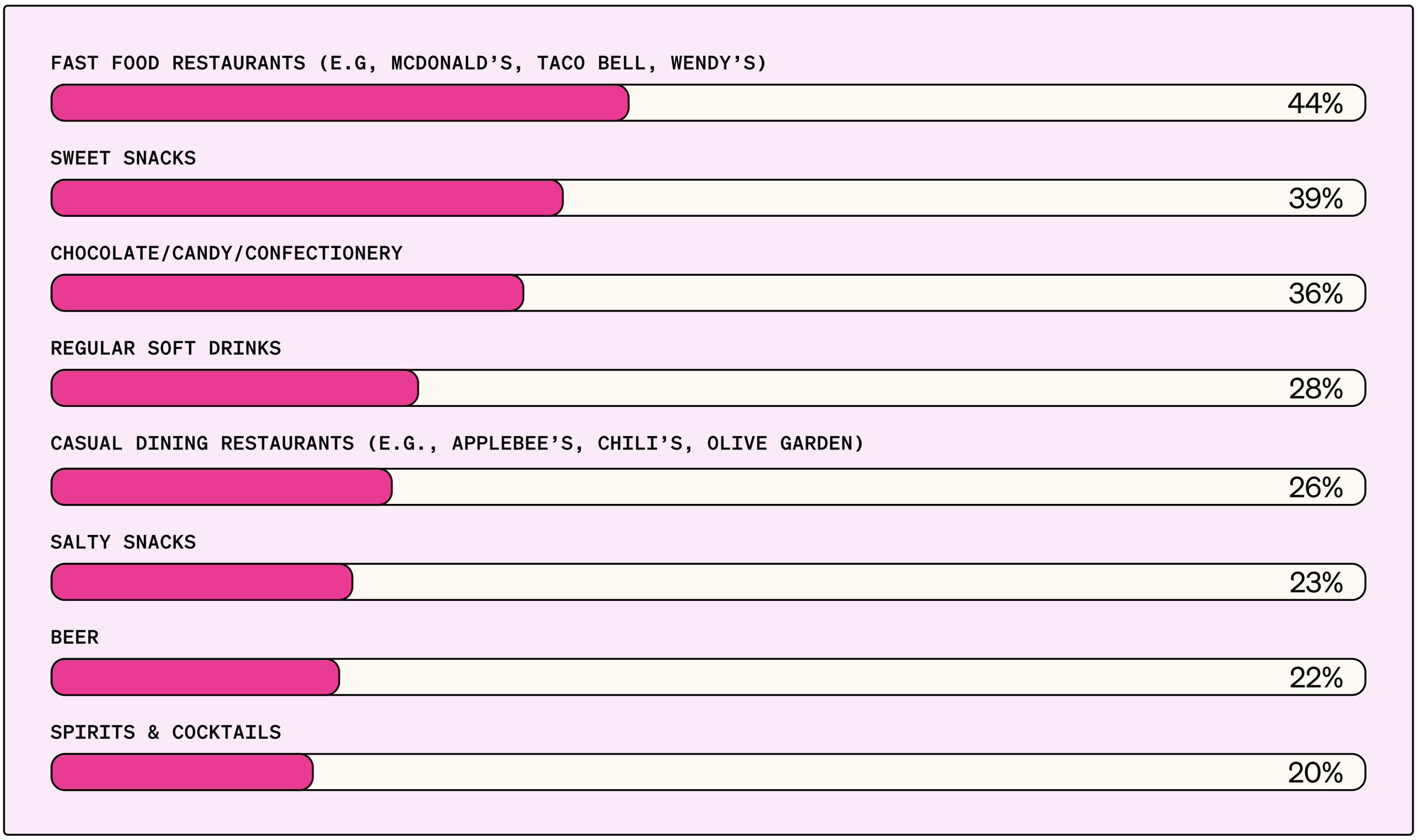
Nestlé created Vital Pursuit, a frozen range designed around smaller appetites and higher protein.



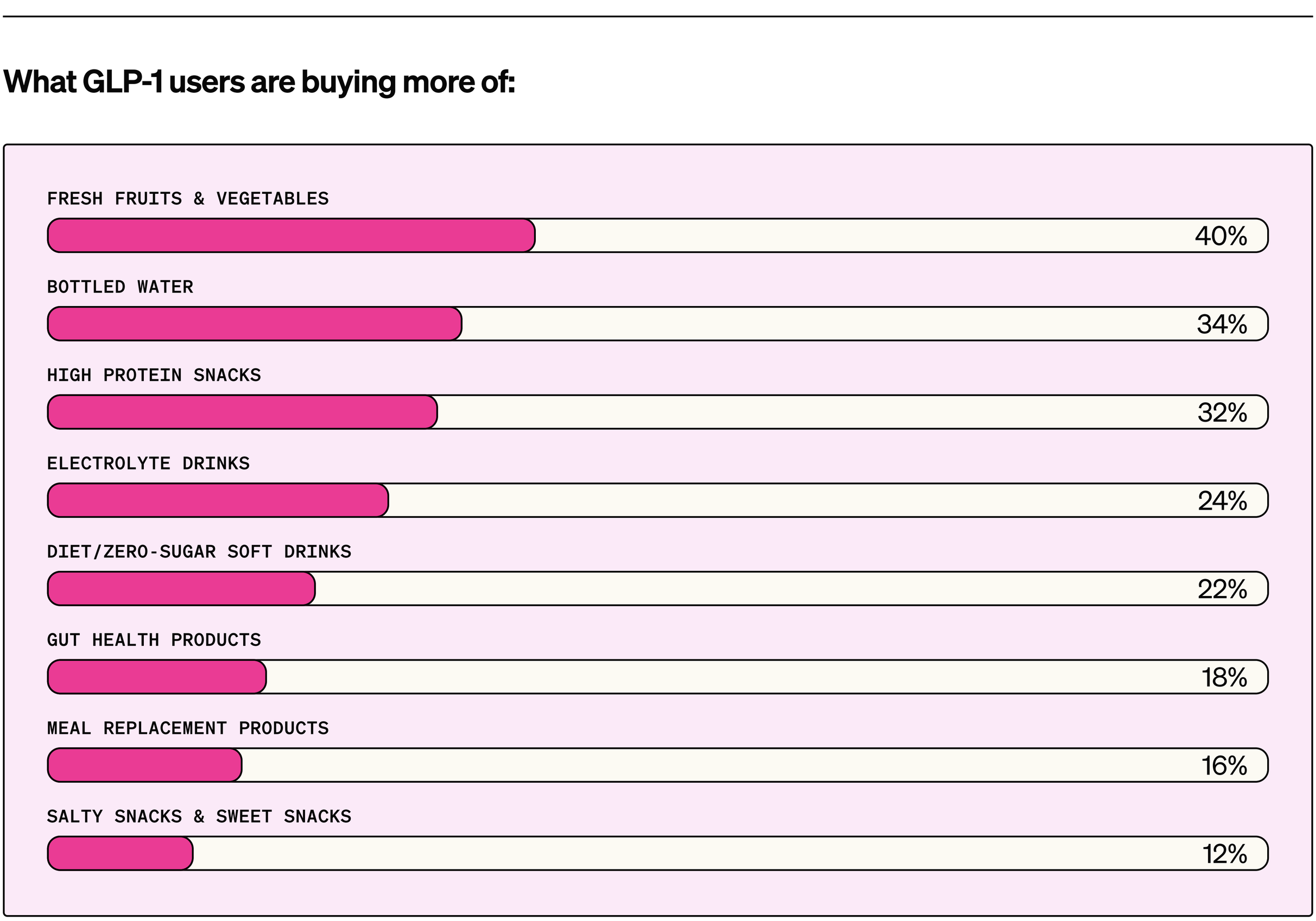




What GLP-1 users are buying less of:



What GLP-1 users are buying more of:



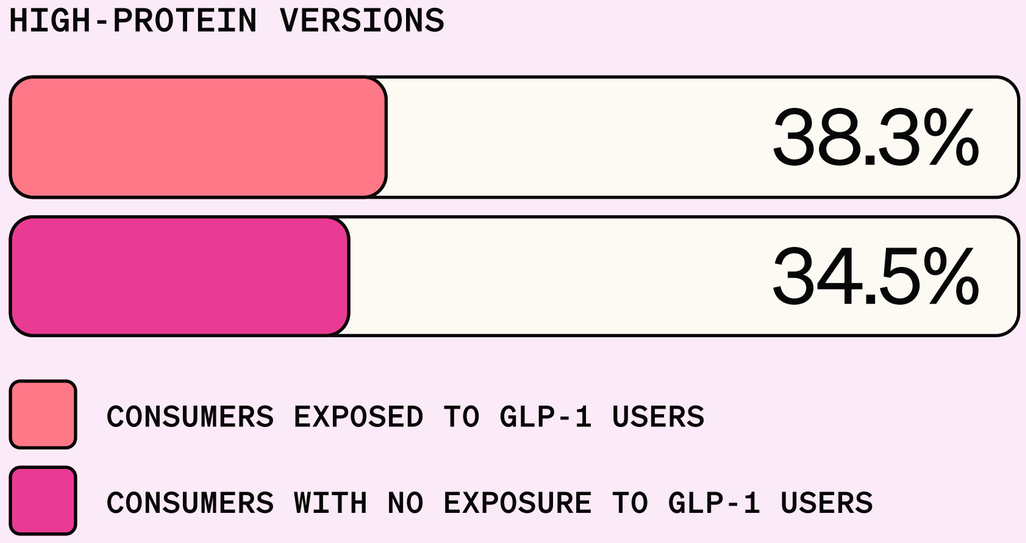
Protein is the new value signal.

As appetite shrinks, every purchase has to work harder.

That helps explain why protein is emerging as one of the strongest signals in the grocery basket. Consumers aren't simply looking for more nutrition. They're looking for foods that feel satisfying, functional and worth the appetite they take up.

The shift is already visible. People living alongside a GLP-1 user are more likely to eat more protein (43%), buy high-protein versions (42%) and reduce sugar (42%) than consumers with no exposure to the medication.

High-protein buying climbs with GLP-1 proximity



The grocery basket is becoming more efficient.

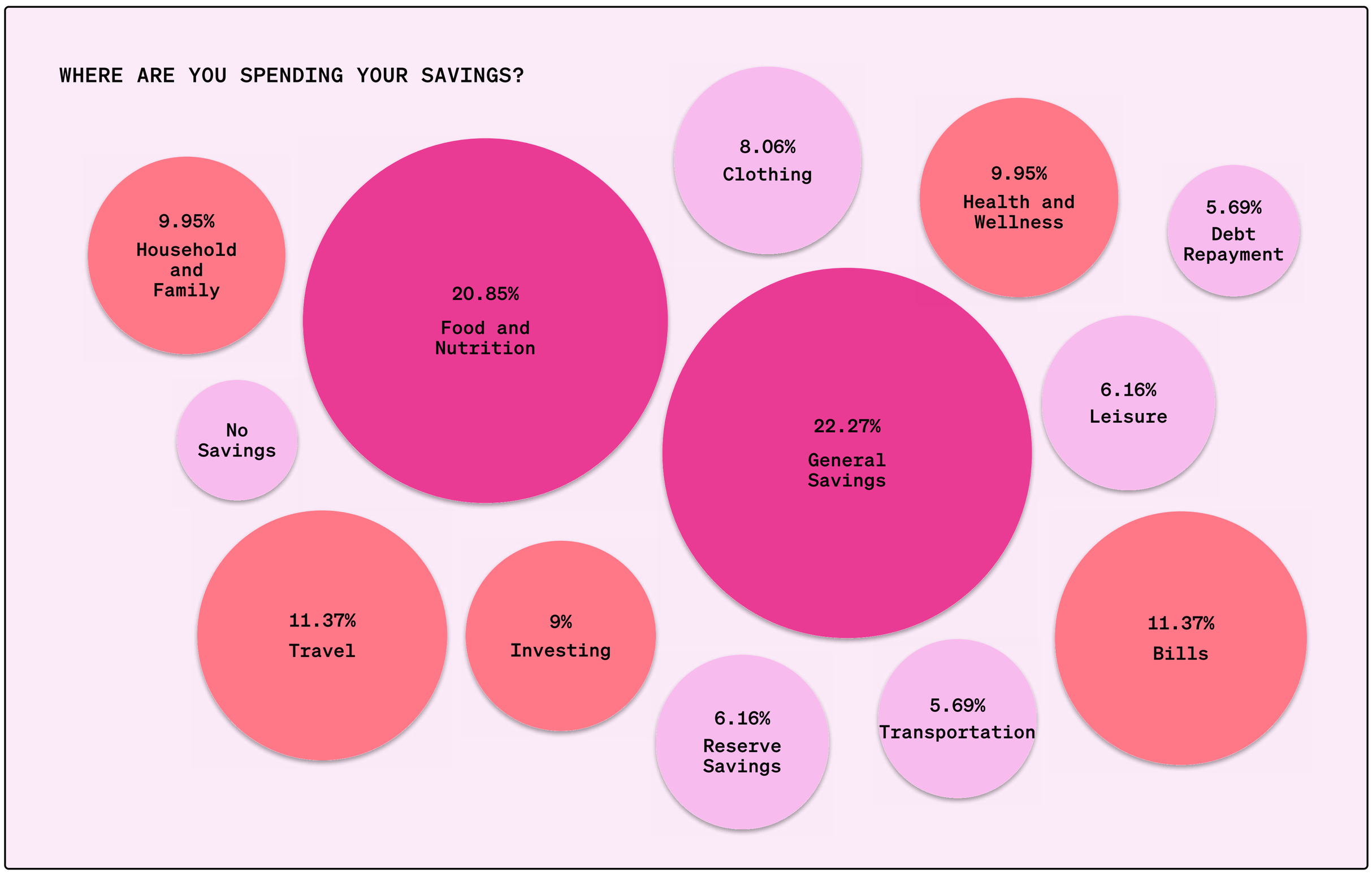
GLP-1s are impacting the way Americans spend.

Thirty-eight percent of Americans say their total food and drink spend has decreased since starting a GLP-1, compared with 22% spending more. Another 40% report spending about the same.

At the same time, spending is being redirected towards higher-value purchases.

Fresh fruit and vegetables **(40%)**, bottled water **(34%)**, protein bars and shakes **(33%)** and high-protein snacks **(31%)** are among the categories users are buying more often, while fast food **(44%)**, sweet snacks **(39%)** and confectionery **(36%)** are seeing the largest declines.

The basket isn't just getting smaller. It's becoming more selective.



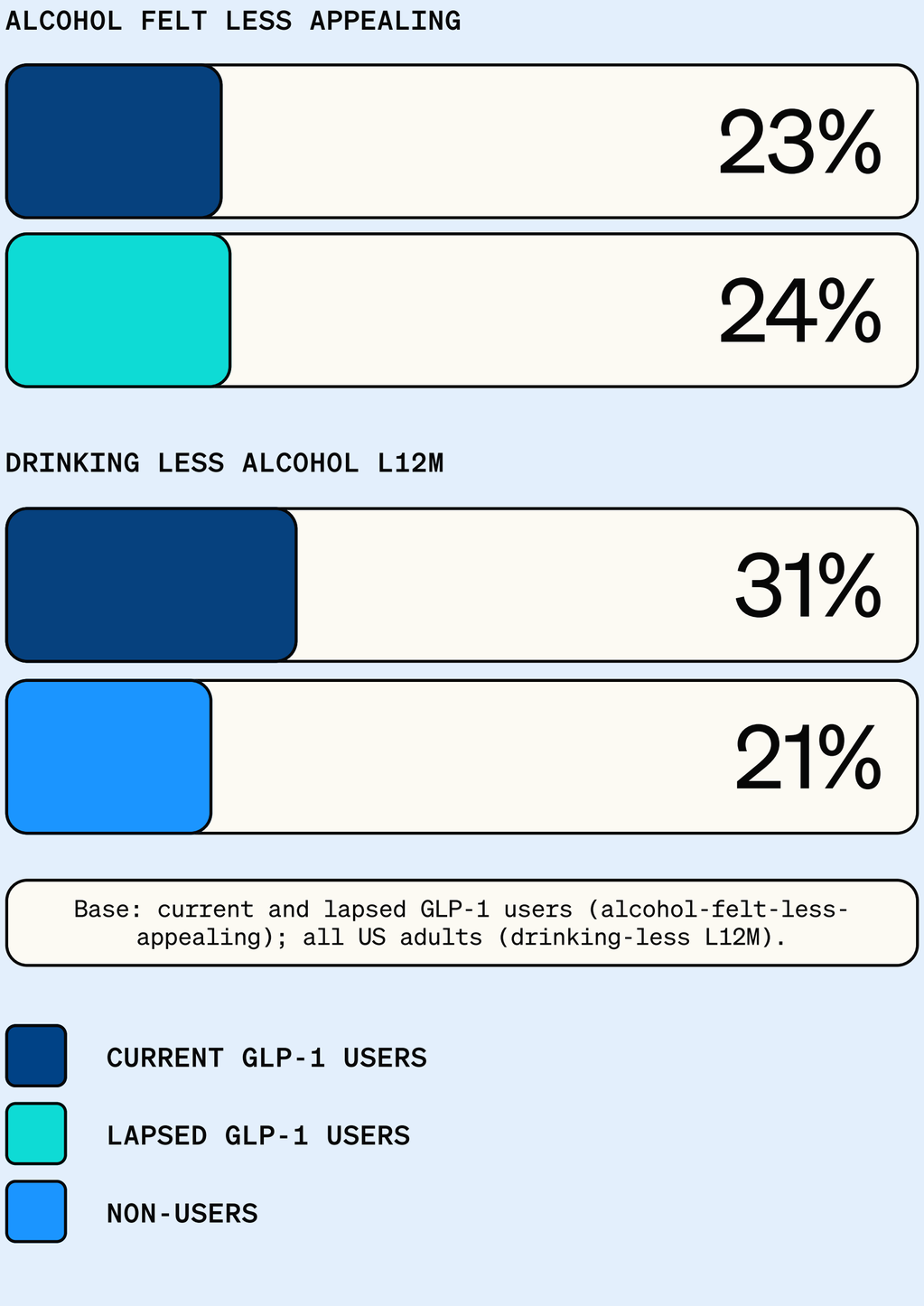
How GLP-1s Are Reshaping The Pour

If the biggest question facing snacking is what replaces the snack, the biggest question facing alcohol is what replaces the occasion?

Drinking is already declining. Thirty-one percent of GLP-1 users say they drink less than they did a year ago, but the pullback extends beyond the prescription. Twenty-three percent of people living alongside a GLP-1 user also report drinking less, compared with 21% of people with no exposure.

The assumption has been that lower alcohol consumption would naturally drive demand for alcohol-free alternatives. Our research suggests the story is more complicated.

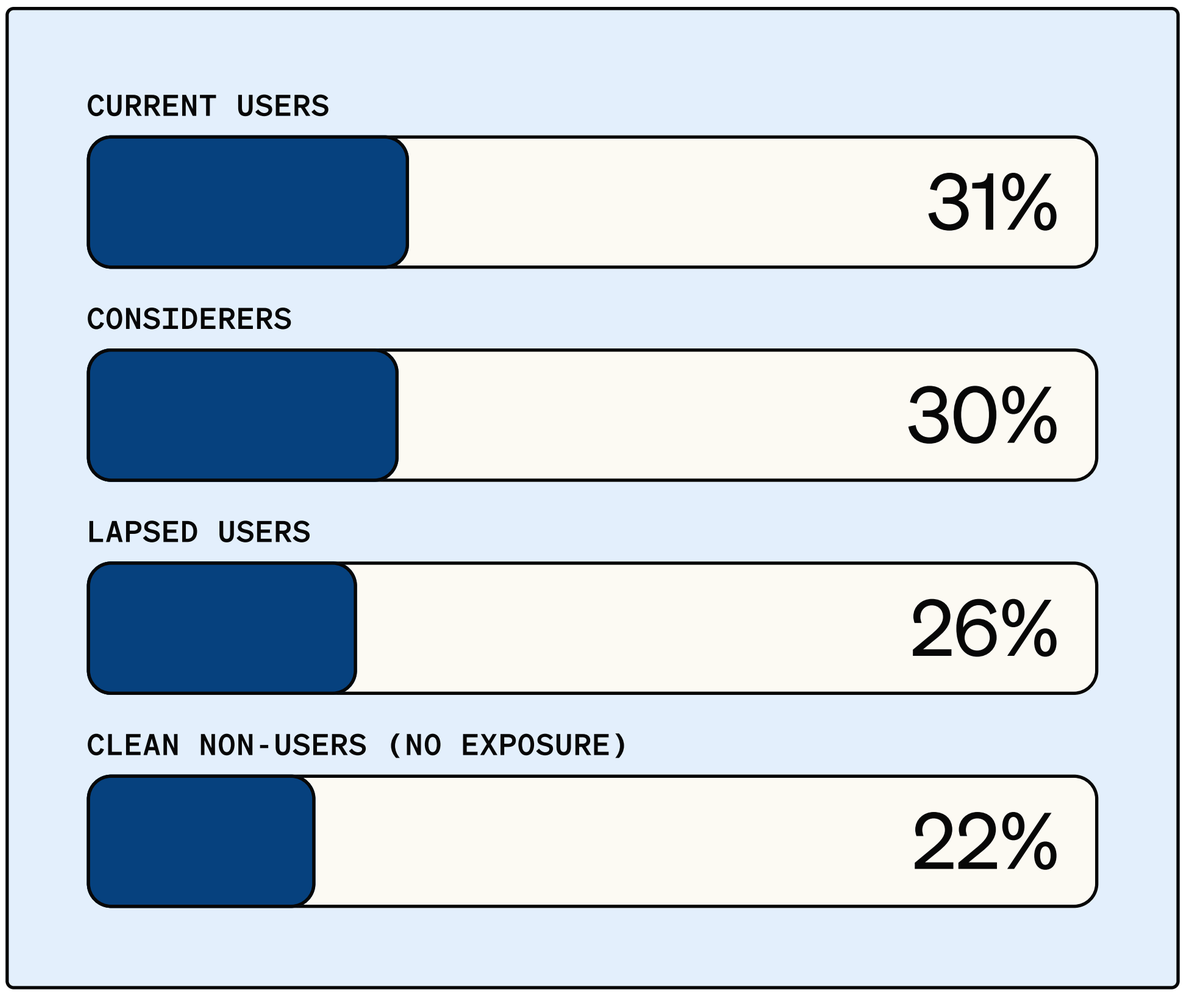
The pullback that doesn't reset.



The change isn't confined to people taking the medication.

People considering GLP-1s report drinking less at almost exactly the same rate as current users, while even people with no exposure show meaningful declines. Rather than a niche behavior, lighter drinking is becoming part of a broader cultural shift. GLP-1 appears to be accelerating a trend already underway.

> “You can’t eat big portions anymore and you drink less alcohol.”
>
> CURRENT GLP-1 USER, ASKED WHAT SURPRISED HER MOST.

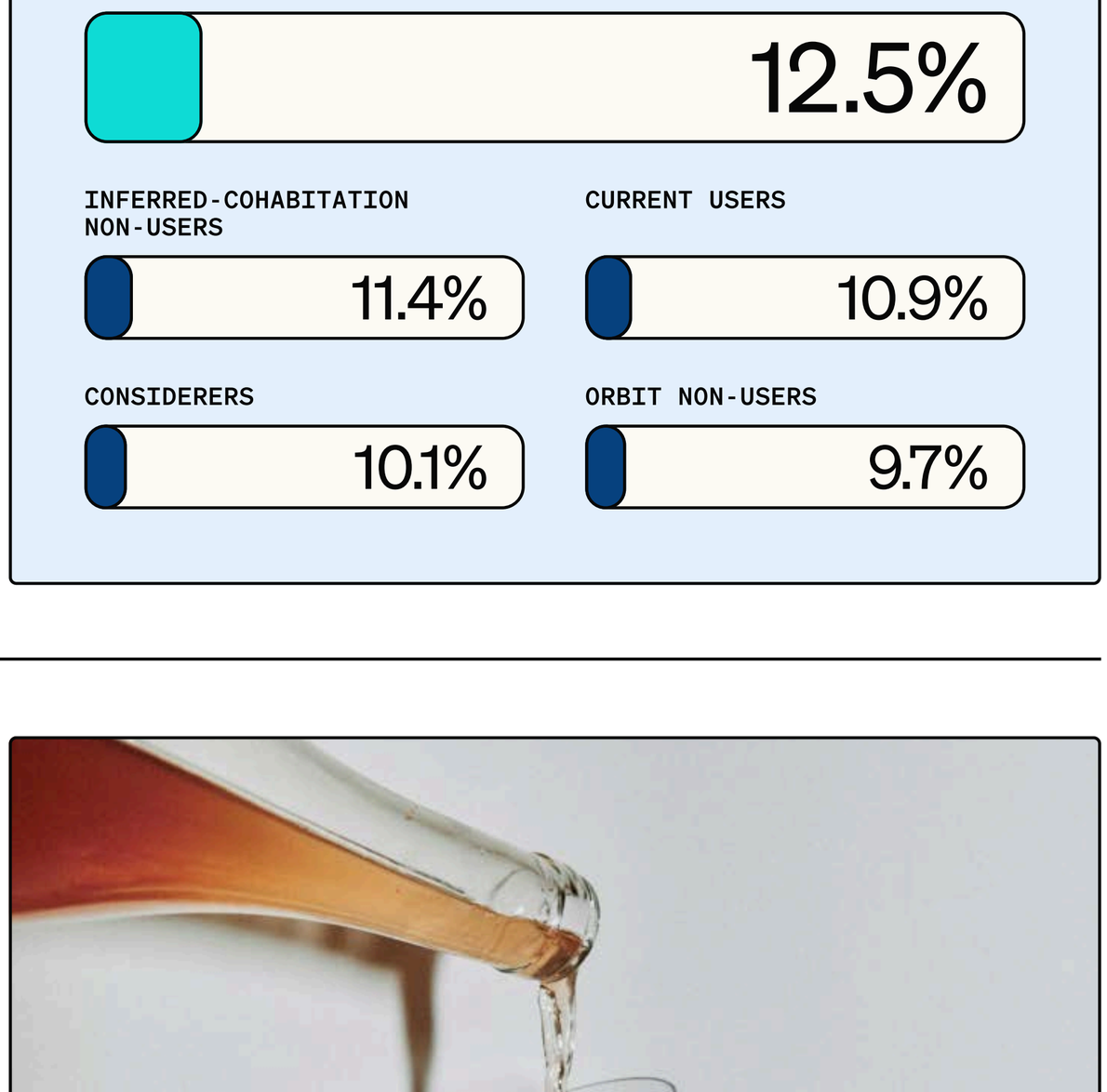


The next opportunity isn't simply alcohol-free.

The industry has invested heavily in non-alcoholic alternatives, expecting them to absorb the changing demand. Our data suggests the opportunity is broader.

Across the GLP-1 footprint, only around one in ten people identify non-alcoholic drinks as a major purchase driver. People drinking less are no more likely than everyone else to be actively seeking alcohol-free alternatives.

Consumers aren't simply swapping one drink for another. They're changing when, why and how they drink. The opportunity extends beyond alcohol-free products to rethinking the occasions, rituals and experiences that surround drinking.



The wallet and the drug are pushing in the same direction.

GLP-1s aren’t acting alone.

Many of the same behaviors associated with the medication, eating smaller portions, cutting back on takeaway and buying fewer ultra-processed foods, are also being reinforced by cost-of-living pressures. Two powerful forces are moving consumer behavior in the same direction.

Among people considering a GLP-1, the cost of living ranks ahead of the medication as the biggest influence on how they eat, drink and shop. Products that deliver stronger nutrition, greater satiety and better value are well positioned regardless of whether the motivation is the medication, the household budget or both.



The Juice Bar Is Becoming A Functional Food Destination

Freshness got you here. Function takes you further.

For years, juice bars have competed on freshness, convenience and feel-good indulgence. GLP-1s are changing the equation.

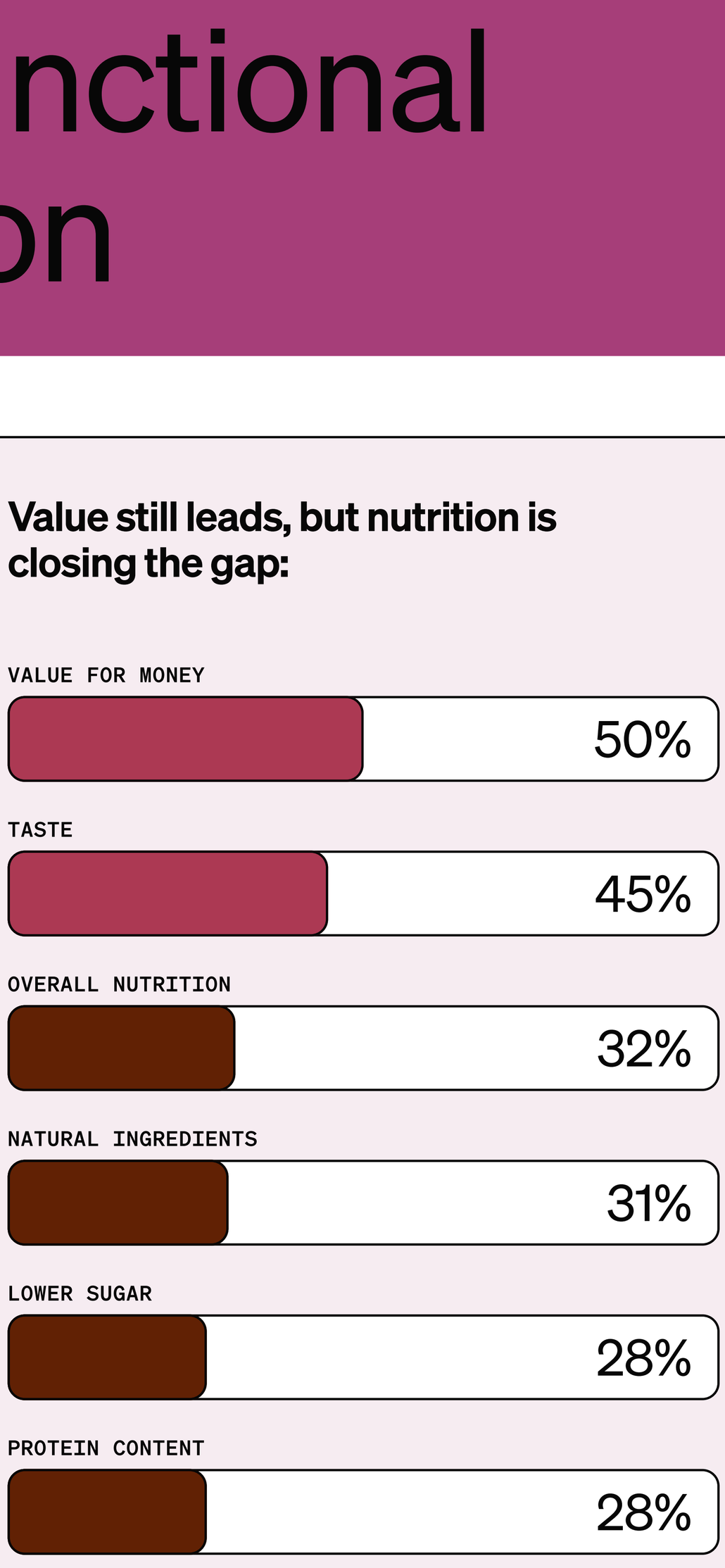
As appetite shrinks, consumers become more selective. Every meal, snack and drink has to earn its place. The question is no longer "What tastes good?" It's "What delivers the most value for my appetite?"

That shift plays directly into the strengths of the category.

Consumers are placing more importance on taste (45%), overall nutrition (32%), natural ingredients (31%), lower sugar (28%) and protein (28%). Among younger consumers, the trend is even stronger. Adults aged 18 to 24 over-index on nutrition (41%), while Millennials lead on protein (34%).

The juice bar is increasingly being judged as functional nutrition rather than a refreshing treat. And that creates an opportunity.

Value still leads, but nutrition is closing the gap:



Quality becomes the new value signal

Value for money remains the biggest priority overall (50%). But value increasingly means nutritional value, not simply more volume.

GLP-1 users make that shift especially clear.

Compared with the average consumer, they place less emphasis on price-led promotions and show less interest in buy-one-get-one offers. Instead, they gravitate towards protein, fiber and functional upgrades. Consumers are making more intentional decisions.



The opportunity is serving two consumer mindsets

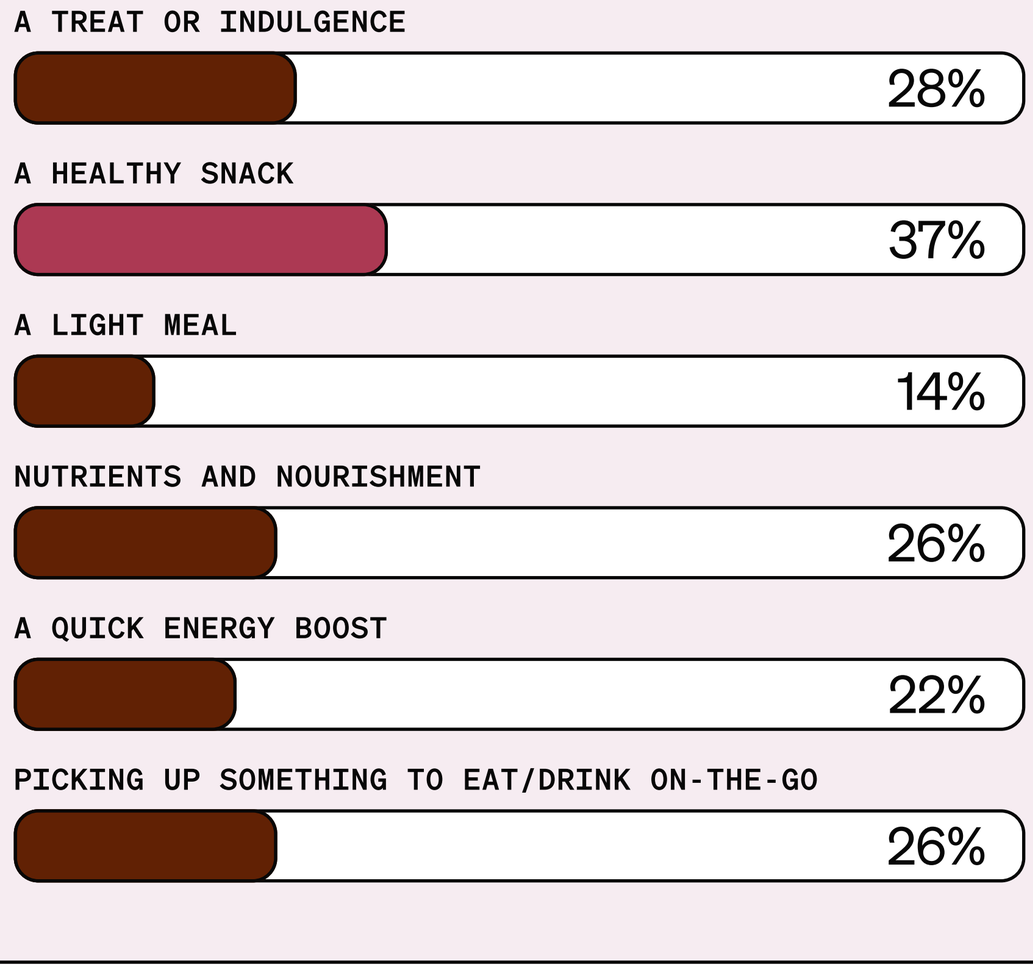
Consumers aren’t becoming less value conscious. They’re redefining what value means.

One group continues to chase affordability, with half of consumers naming value for money as their biggest rising priority and one-third drawn to BOGO offers. Another is prioritising nutrition, functionality and ingredient quality over quantity.

The brands best positioned for the next phase won't choose between those audiences. They'll serve both. That means pairing compelling value offers with menus built around protein, lower sugar, fiber and functional nutrition.

As GLP-1s reshape eating habits, quality itself becomes a value proposition.

Health beats indulgence at the juice bar:



“GLP-1s aren't changing what consumers want- they’re accelerating a broader shift toward more intentional eating.”

“We're seeing guests expect more from every eating occasion, placing greater value on nutritional quality, functional ingredients and protein because every bite and sip needs to deliver real value. At Nékter, that shift validates a philosophy we've believed in for years - real, functional nutrition should be convenient, craveable and accessible. Protein has never been a trend for us, bringing it more prominently to the forefront is simply the latest chapter in our long-standing commitment to helping guests fuel their lives.
As consumers continue to redefine value through nutrition rather than quantity, brands that consistently deliver functional, ingredient-led offerings will be best positioned for the future.”

CORRY REID,
CHIEF MARKETING OFFICER | NEKTER JUICE BAR

GLP-1s Are Rewiring The Palate

GLP-1s change more than total intake. They alter how food tastes.

While much of the industry conversation has centered on dulled taste, our data suggests the experience is more complex. For many consumers, flavors become more intense rather than weaker, creating a palate that is fundamentally different from before treatment. That distinction matters because it changes the reformulation challenge.

It's a shift that's already prompting manufacturers like Nestlé to rethink flavor development, experimenting with bolder spice blends and stronger seasoning as they prepare for the next generation of consumers.



Taste Is Becoming Less Predictable

Taste doesn't stay neutral on a GLP-1. While 45% of users report no meaningful change, most notice a shift, and it more often moves towards heightened flavor intensity than reduced sensitivity. One in three (34%) say food tastes more intense, while 20% report that flavors have become duller.

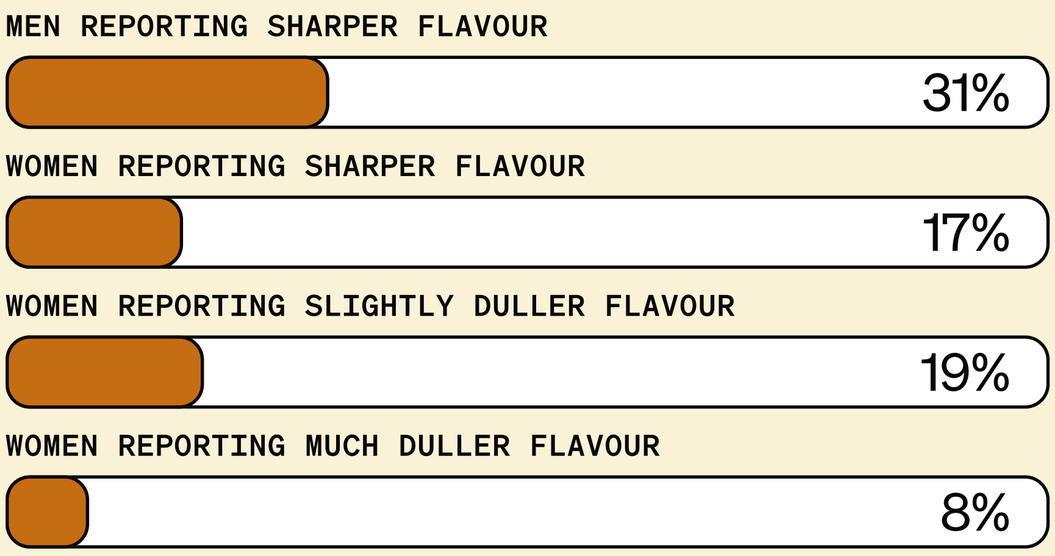
For food brands, that creates a new challenge. Products developed around carefully balanced flavor profiles may no longer taste the way they were intended. What once felt satisfying may now feel overwhelming for some consumers, while others experience the opposite.

The experience also differs by gender. Men are more likely to report heightened flavor intensity, with 31% saying food tastes sharper compared with 17% of women. Women are more likely to experience a blunting of taste, with 19% reporting food tastes slightly duller and 8% much duller.

Changes in overall taste perception:



Direction of change, by gender:



Hyper-Palatable Foods Lose Their Edge

The categories most dependent on appetite and reward are often the first to lose relevance.

Fast food leads the decline, with 41% of users saying they avoid it more often after starting a GLP-1. Chips and crisps (37%), ice cream and desserts (33%) and candy (31%) follow closely behind. Only 15% say none of their food preferences have changed.

The shift is strongest among women and older consumers. Women are more likely than men to avoid fast food, candy and chocolate, while avoidance of fast food peaks among 55 to 64 year-olds at 62%.

This helps explain why highly engineered, hyper-palatable categories are among the earliest to feel the impact. It's not simply reduced appetite. For many consumers, these products no longer deliver the same sensory reward.

Categories consumers are avoiding since starting a GLP-1:

Sweetness Changes First

Not every flavor changes equally.

Salt remains relatively stable, with more than half of users (53%) saying salty foods taste the same as before treatment. Where it does change, the shift is more likely towards increased intensity than reduced perception.

Sweetness tells a different story. One in three users (33%)- say sweet foods now taste stronger, but among consumers aged 25 to 34 that rises to 55%. Only 27% of younger users report no change, compared with 47% overall.

As GLP-1 adoption continues to expand among younger consumers, products designed around indulgence may begin to overshoot the mark. For many consumers, sweetness isn't simply less desirable. It becomes harder to tolerate.

Consumers Reward Brands That Adapt

Consumers don't see reformulation as compromise. They see it as responsiveness.

Nearly half (48%) say they would think more positively of a brand that adjusted flavor intensity, sweetness or portion sizes to better suit GLP-1 users, while only 9% see reformulation negatively.

The opportunity is particularly strong among younger-consumers. Seven in ten (70%) users aged 25 to 34 say reformulation would improve their perception of a brand, compared with around one quarter of those aged 65 and over.

Rather than viewing reformulation as making products less indulgent, many consumers see it as evidence that brands understand how their needs are evolving.

Consumer sentiment towards reformulation:

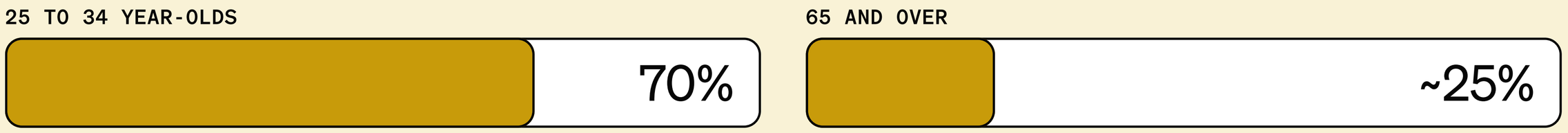
48%

WOULD THINK MORE POSITIVELY OF A BRAND THAT REFORMULATED TO BETTER SUIT GLP-1 USERS

9%

SEE REFORMULATION NEGATIVELY

Consumers who say reformulation would improve their view of a brand, by age:



The Industry Is Already Responding

Food manufacturers have already begun adapting. Nestlé has announced plans to experiment with bolder spice blends, stronger seasoning and protein-forward versions of existing products as it responds to changing consumer preferences.

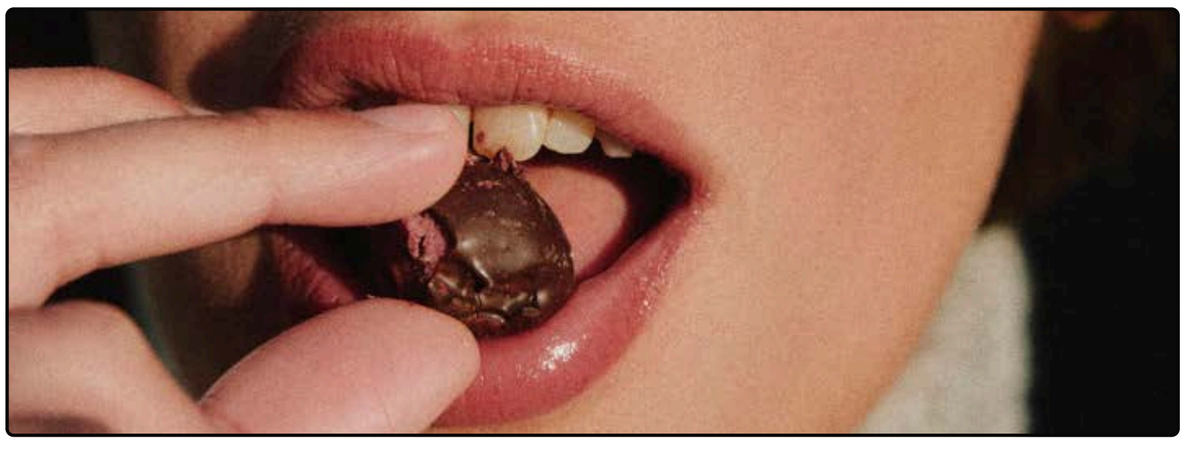
Flavor remains relatively underexplored, creating an opportunity for brands willing to rethink the sensory experience of eating.

The Next Frontier Is Flavor

The first generation of GLP-1 innovation focused on protein, portion sizes and satiety. The next wave will center on flavor.

The opportunity extends far beyond current users. While 10% of Americans currently use a GLP-1, almost 60% now sit within the broader GLP-1 footprint, including current users, former users, those considering treatment and the households adapting alongside them. For food brands, that's an audience six times larger than the current user base.

As the industry's focus expands beyond nutrition and portion control, the next competitive advantage will come from understanding how consumers experience food itself. Brands that rethink flavor, texture, sweetness and satisfaction for a changing palate will be better positioned than those simply making existing products smaller or healthier.



About this research: Based on a nationally representative study of 1,095 US adults on 17 July 2026.

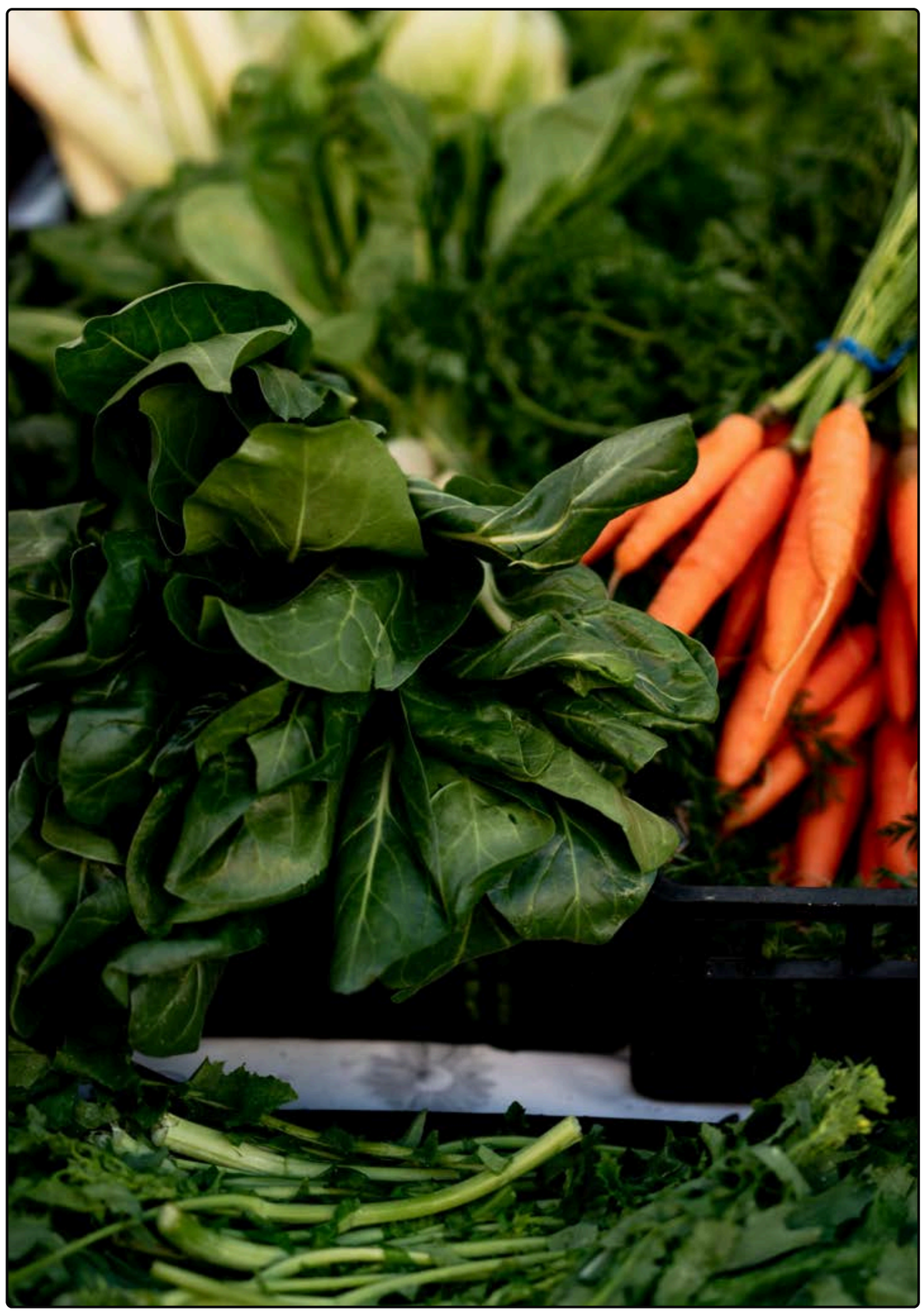
IDEALLY INVESTIGATES: GLP-1 IN THE US

GLP-1s Are Creating A New Fiber Habit

GLP-1s are changing what people look for in food, and fiber appears to have unusual staying power.

Among current and former users, three in four now eat more fiber than before. For some, the shift is deliberate. For others, it has already become something they do without thinking.

The pattern suggests fiber could become one of the longer-lasting dietary shifts associated with GLP-1 use.



Three In Four Are Eating More Fiber

Among current and former GLP-1 users, 43.4% say they actively try to eat more fiber than before, while another 31.7% eat more without consciously thinking about it. Just 5.2% say they eat less.

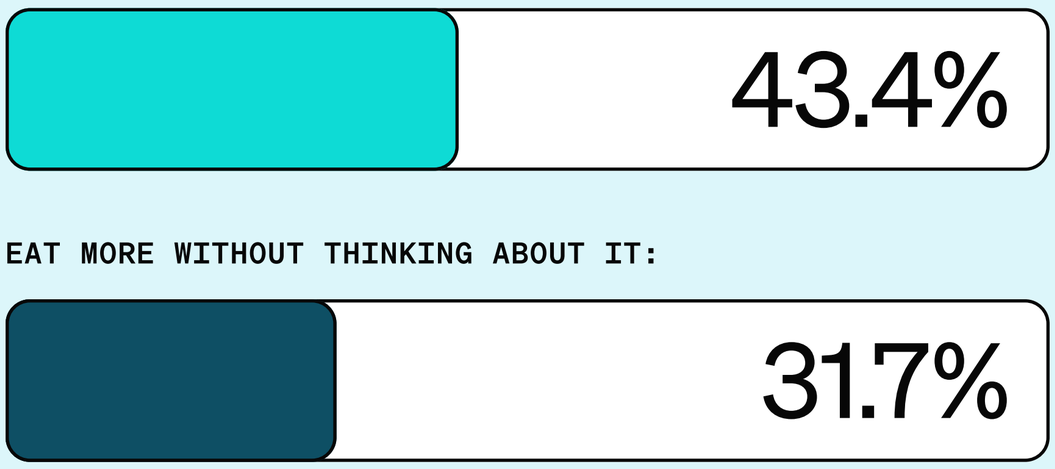
The motivation is practical. Six in ten (60.4%) want to make smaller portions work harder. Another 32.0% use fiber to stay fuller for longer, while 28.4% want to pack more nutrition into less food.

There may be another factor at play. Constipation is a common side effect of GLP-1 medications, which could prompt some users to pay closer attention to fiber in the first place. More than half (53.5%) trace their increased awareness of fiber directly to their GLP-1 journey, suggesting the medication can act as a trigger for the behavior.

What begins as a response to changing appetite, and any side effects that come with it, may eventually become part of the way people eat.

As appetite shrinks, fiber helps every bite deliver more.

How fiber intake has changed:



The Habit Outlasts The Prescription

Fiber may start as an active choice and end as a habit.

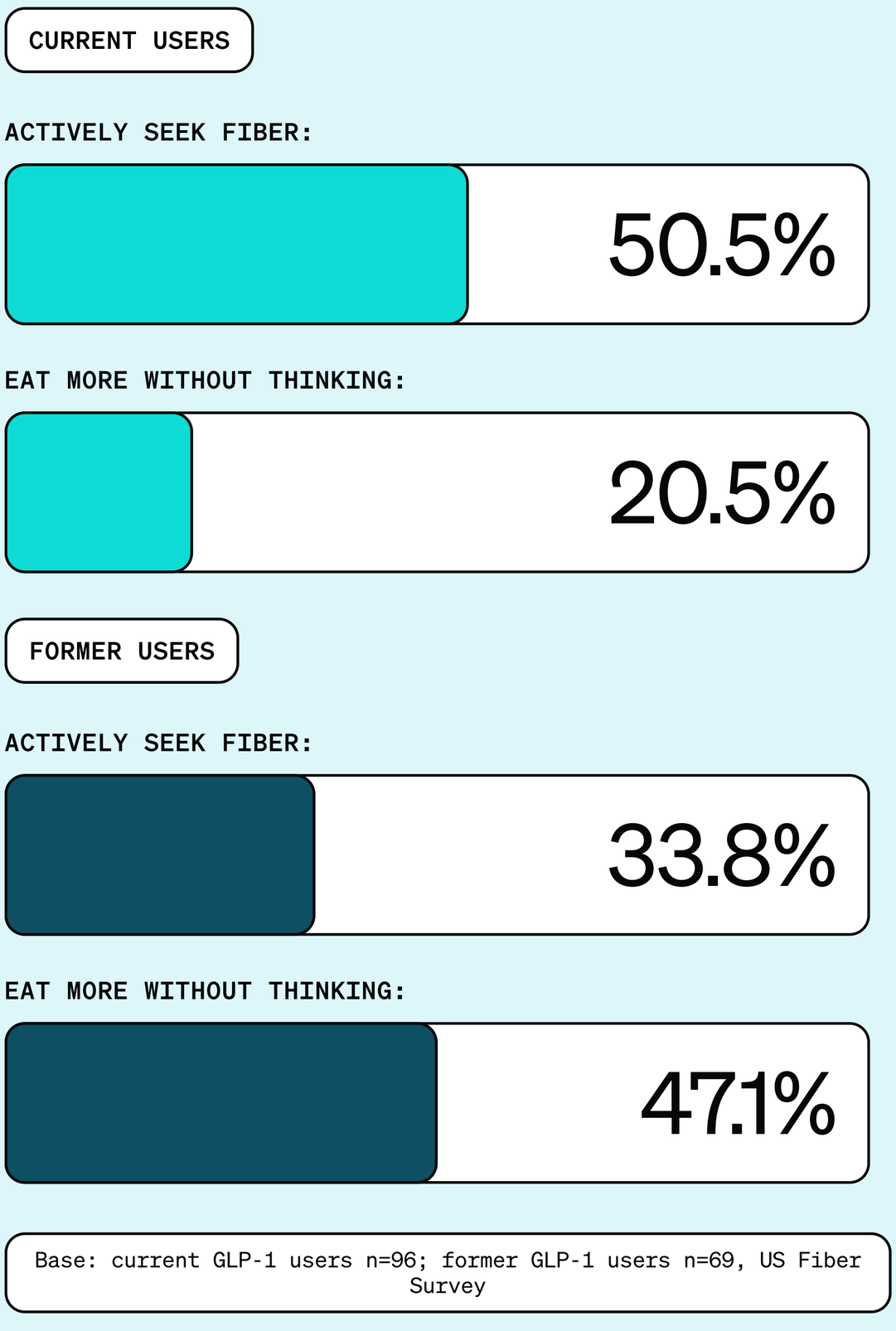
Half (50.5%) of current GLP-1 users actively seek out fiber. Among former users, that falls to 33.8%. But almost half (47.1%) of former users say they now eat more fiber without thinking about it, more than double current users (20.5%).

Overall, 80.9% of former users are eating more fiber.

It's another sign that GLP-1s may leave a lasting imprint on how people eat, even after the prescription ends.



Active vs passive fiber-seeking



Base: current GLP-1 users n=96; former GLP-1 users n=69, US Fiber Survey

Consumers Want Proof On Pack

For fiber, vague health claims won't cut it.

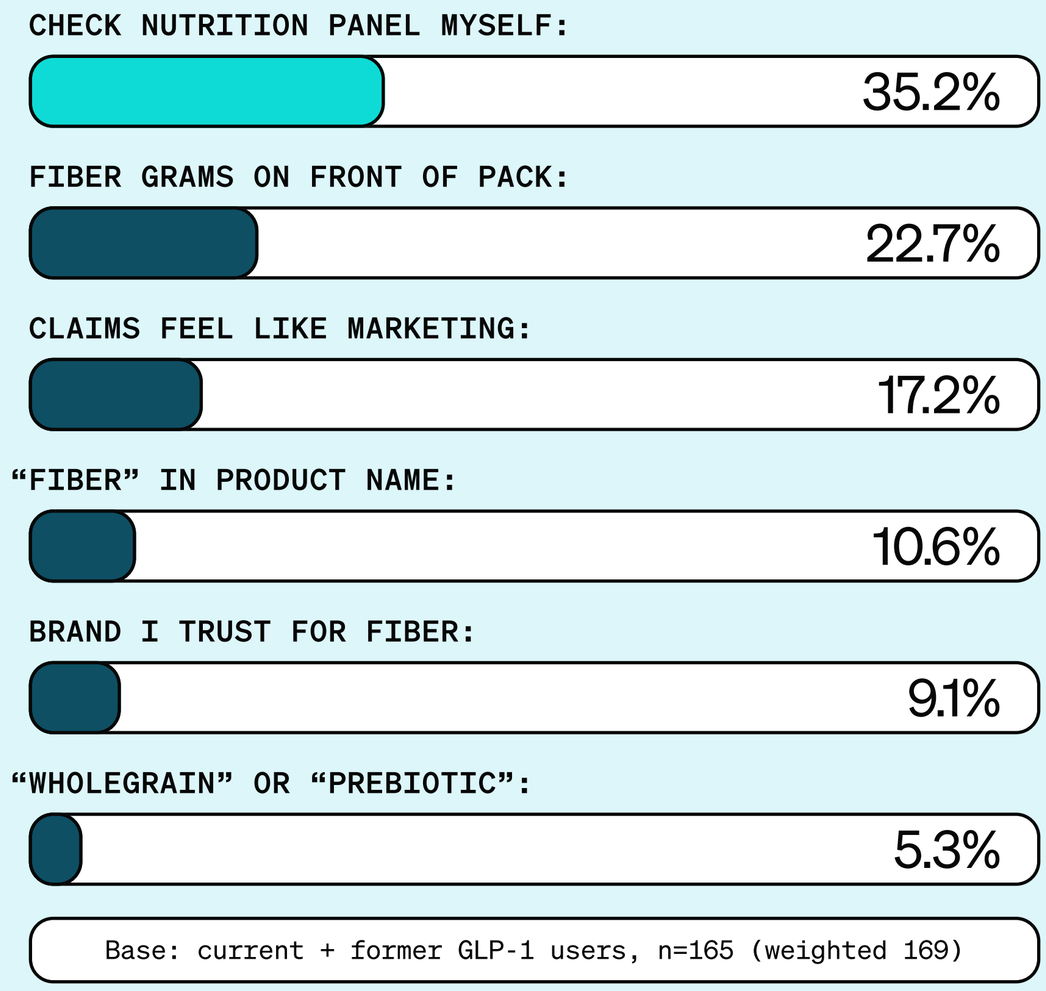
More than a third (35.2%) check the nutrition panel to decide whether a product is genuinely high in fiber, while 22.7% look for the number of fiber grams on the front of pack.

And they have a benchmark: 58.9% say "high fiber" means at least five grams.

There's skepticism too. Almost one in five (17.2%) say nothing on pack convinces them because most fiber claims feel like marketing.

For brands, the implication is simple: put the number on the pack.

What convinces people a product is high in fiber:



Trial Is High. Repeat Is Harder.

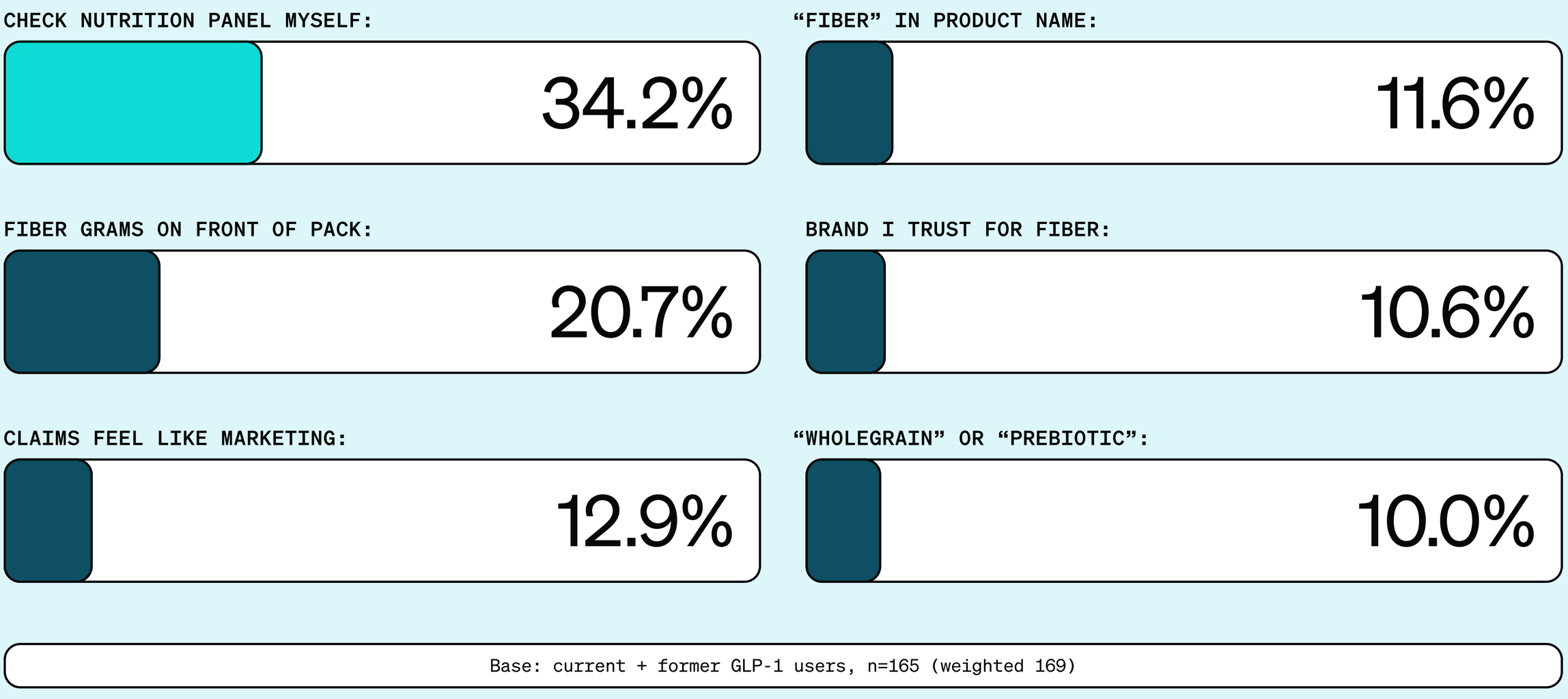
Almost eight in ten (79.4%) current and former users have tried a high-fiber version of an everyday food.

Only 43.1% of those who tried one kept buying it.

Taste and texture are the biggest reasons people walk away. Across the full group, 20.7% tried a high-fiber product - and stopped because the taste or texture was worse. Cost follows at 12.9%, then stomach discomfort at 11.6%.

That creates a clear product challenge. Consumers are already willing to try high-fiber alternatives. Keeping them depends on delivering the eating experience they expect.

What happens after trial:



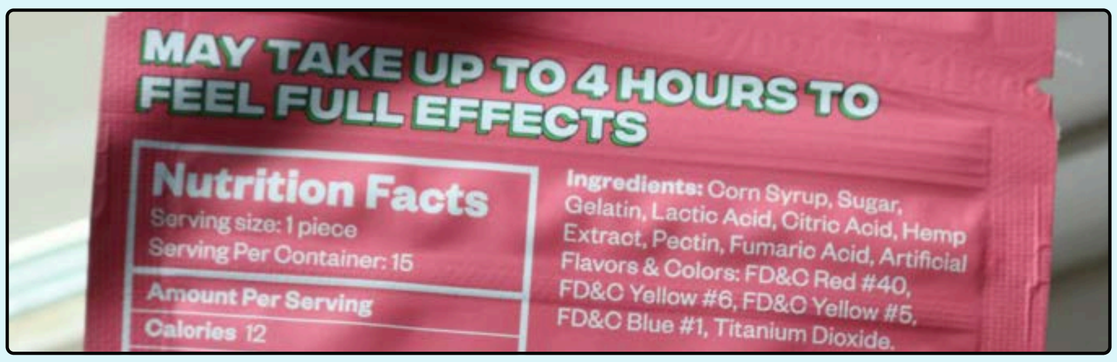
What This Means For Brands

The wider GLP-1 shift is creating a more selective consumer. Protein, satiety and functionality are becoming - more important as every product competes for a smaller appetite. Fiber belongs firmly in that equation.



Build for the long term.

Fiber habits appear to persist after GLP-1 use ends. That gives brands an opportunity extending beyond the current prescription population.



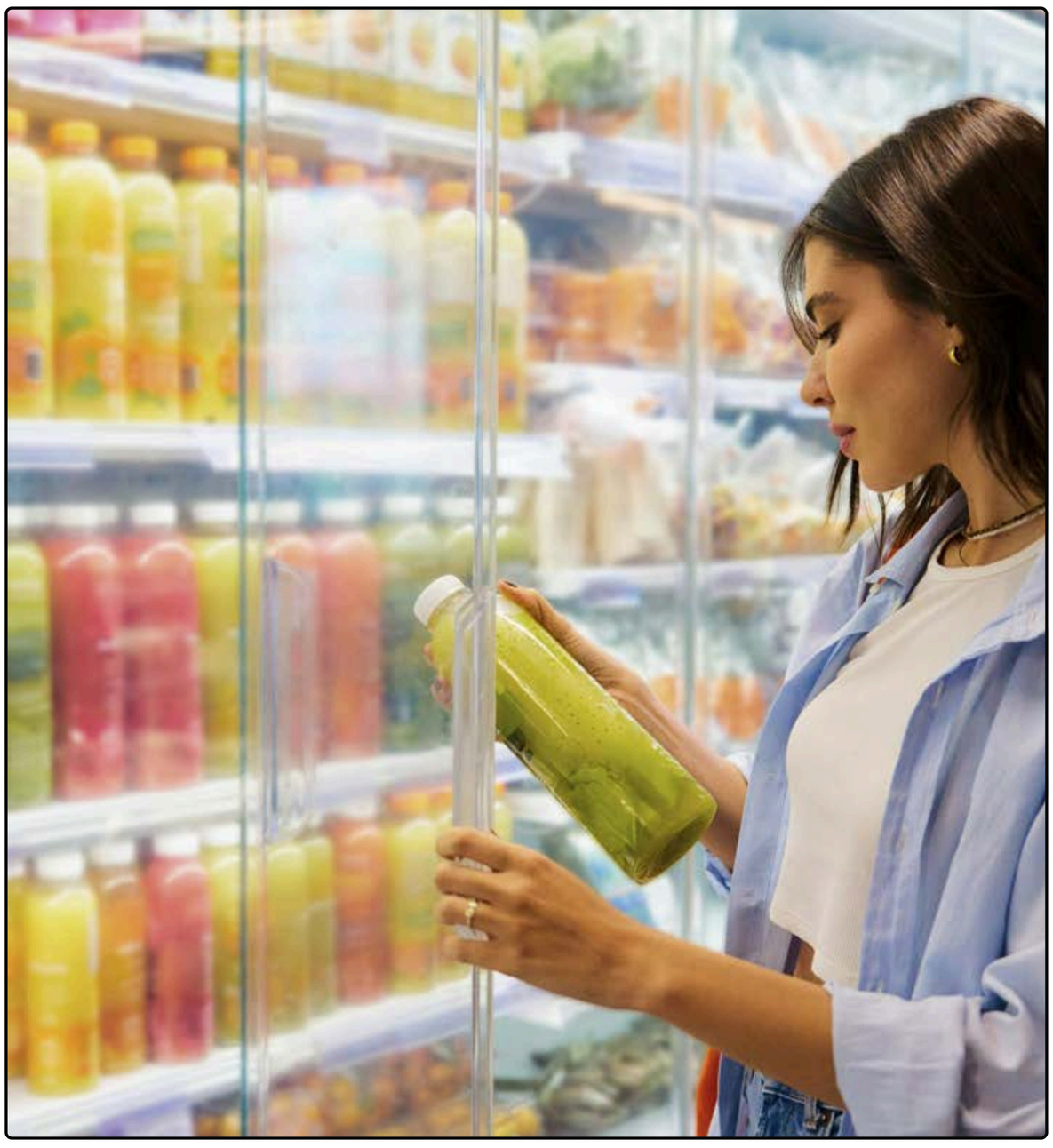
Put the number on pack.

Consumers are checking grams and reading nutrition panels. Clear, specific fiber credentials carry more weight than broad wellness language.



Protect the eating experience.

Trial is already high, while taste and texture are the biggest barriers to repeat purchase. Product experience will determine whether initial interest becomes a lasting habit.



Fiber is already earning a bigger place in the GLP-1 basket. The brands that can make it credible, convenient and craveable have an opportunity to keep that place long after the prescription ends.

About The Research: Ideally surveyed 1,094 US adults on 17 July 2026. Findings in ‘GLP’1s are impacting Fiber’ focus primarily on the 165 current and former GLP-1 users within that sample.

The Fast Food Problem Is Bigger Than Appetite

GLP-1s are changing how Americans order fast food. But they're doing so alongside an even bigger pressure: price.

Asked what is shaping their fast food habits today, almost half of Americans (48.9%) point to cost and value for money. More than a third (36.7%) are eating at home specifically to save money, while 30.4% point to health and diet.

Just 5.4% explicitly name starting a GLP-1 medication.

That doesn't make GLP-1s irrelevant to QSR. It shows that changing appetite is colliding with a category already under pressure from the wallet.



The Wallet And Appetite Are Pushing In The Same Direction

Cost is the clearest reason Americans are changing their fast food habits. But underneath it, many of the behaviors associated with GLP-1 use are showing up too.

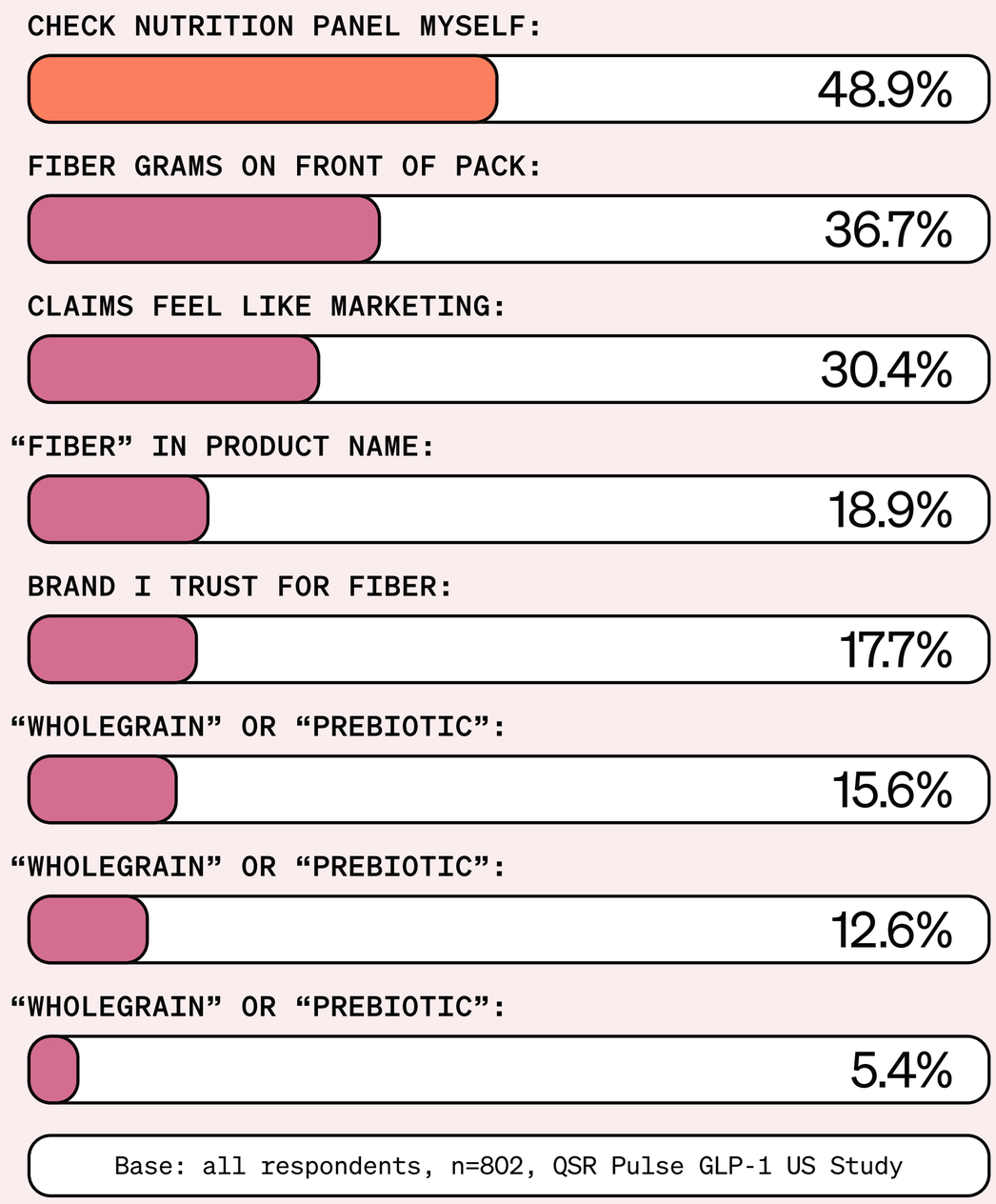
Almost one in five (18.9%) are reducing calories or sugar. Another 17.7% are eating more protein, while 12.6% say they simply get full faster.

Across the category, more Americans are pulling back than leaning in. Almost a third (32.5%) say they are eating fast food less often, compared with 20.9% eating it more often. Another 46.6% report no change.

GLP-1s are one part of that shift. Cost, health and changing appetite are increasingly reinforcing one another.

> "There needs to be better value. Prices need to either come down or portion sizes need to significantly increase."
>
> MALE, 45, MILLENNIAL, EATING FAST FOOD A LITTLE LESS

Why QSR habits are changing:



The Order Is Shrinking At The Edges

When consumers pull back, they aren't cutting every part of the order equally.

Dessert is the first thing to go, with 31.7% ordering it less often, followed closely by soft drinks at 30.6%. Mains and meal deals hold up better.

The same pattern appears when consumers trade up. Among people ordering more of particular items, meal deals and combos lead at 44.5%, followed by the main dish at 41.6%.

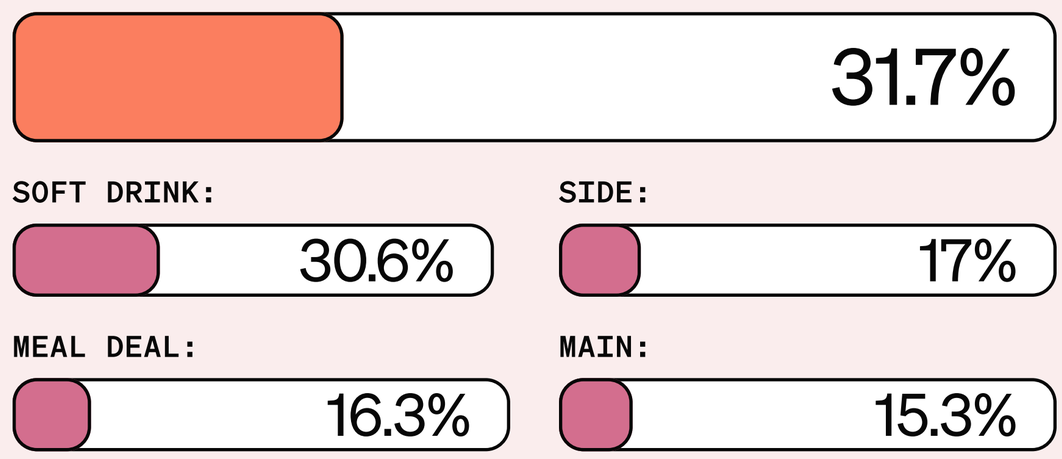
The core meal still has value. The extras are becoming harder to justify.

And when people replace fast food altogether, the biggest competitor isn't another restaurant. It's the kitchen.

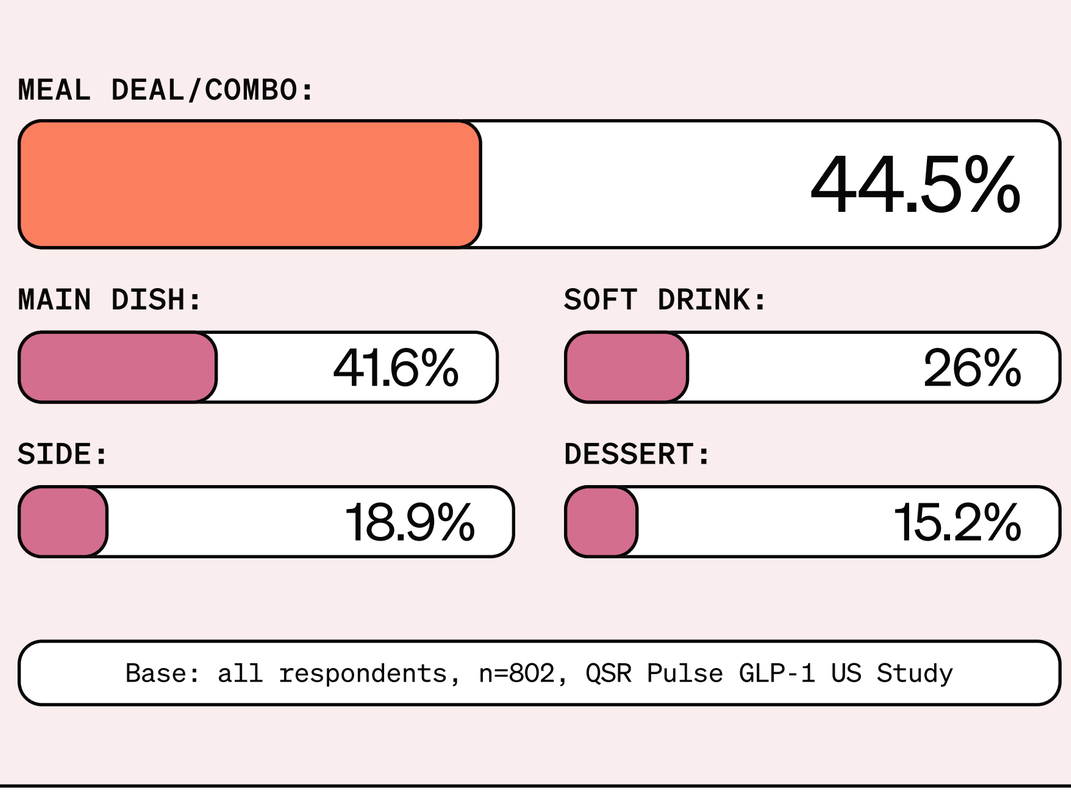
Almost three quarters (73.4%) substitute fast food with eating at home, while 33.1% cook from scratch. Ordering a smaller meal (19.2%) and choosing a healthier restaurant (18.3%) sit much further behind.

> "Offer similar meals with smaller portions."
>
> MALE, 26, GEN Z

Ordered less:



Ordered more:



Smaller Appetites Are Redefining Value

For years, value in fast food has often meant more food for less money.

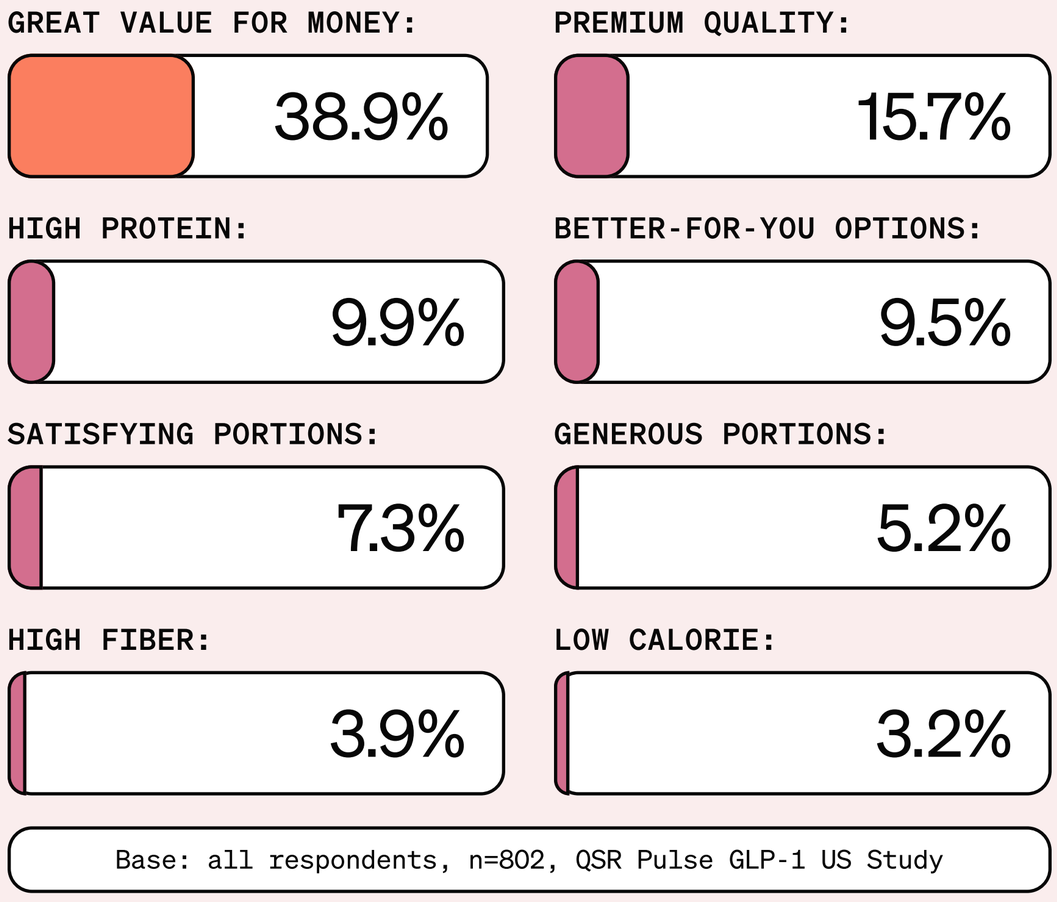
Changing appetites complicate that equation.

Asked what matters most when choosing fast food, 38.9% name great value for money, more than twice as many as premium quality (15.7%). High protein (9.9%), better-for-you options (9.5%) and satisfying portions (7.3%) sit further behind.

The opportunity may be to rethink what value looks like when consumers want less food.

A smaller portion can still feel like good value if the price, nutrition and satisfaction match it.

What drives the order:



Gen Z Is Moving In The Other Direction

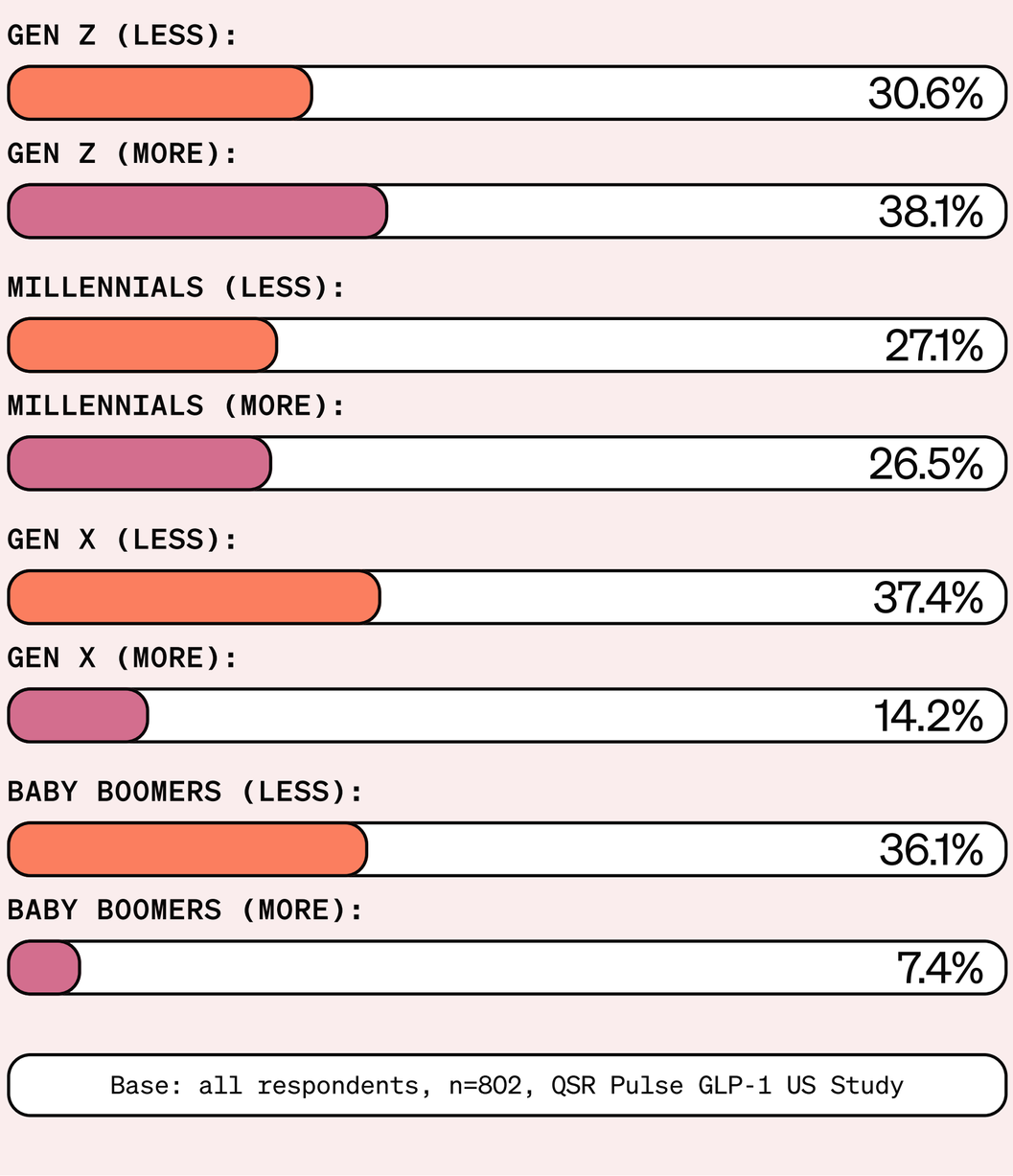
The pullback isn't happening evenly across generations.

Gen Z is the only generation where more people report eating fast food more often (38.1%) than less often (30.6%).

Among Millennials, the two sides are almost evenly split. From there, the gap widens sharply. Just 14.2% of Gen X and 7.4% of Baby Boomers say they are eating fast food more often.

The category is simultaneously dealing with younger consumers increasing their engagement and older consumers pulling away.

Consumption change by generation:





The GLP-1 Customer Looks Different

The 5.4% of respondents who say starting a GLP-1 has changed their fast food habits offer an early, directional view of how the category could evolve as medication use grows.

Their behavior appears more polarized: 41.8% say they are eating fast food more often, while 38.5% say they are eating it less. Yet they are also more likely to report spending more, with 63.4% saying their QSR spend has increased, versus 39.4% of everyone else.

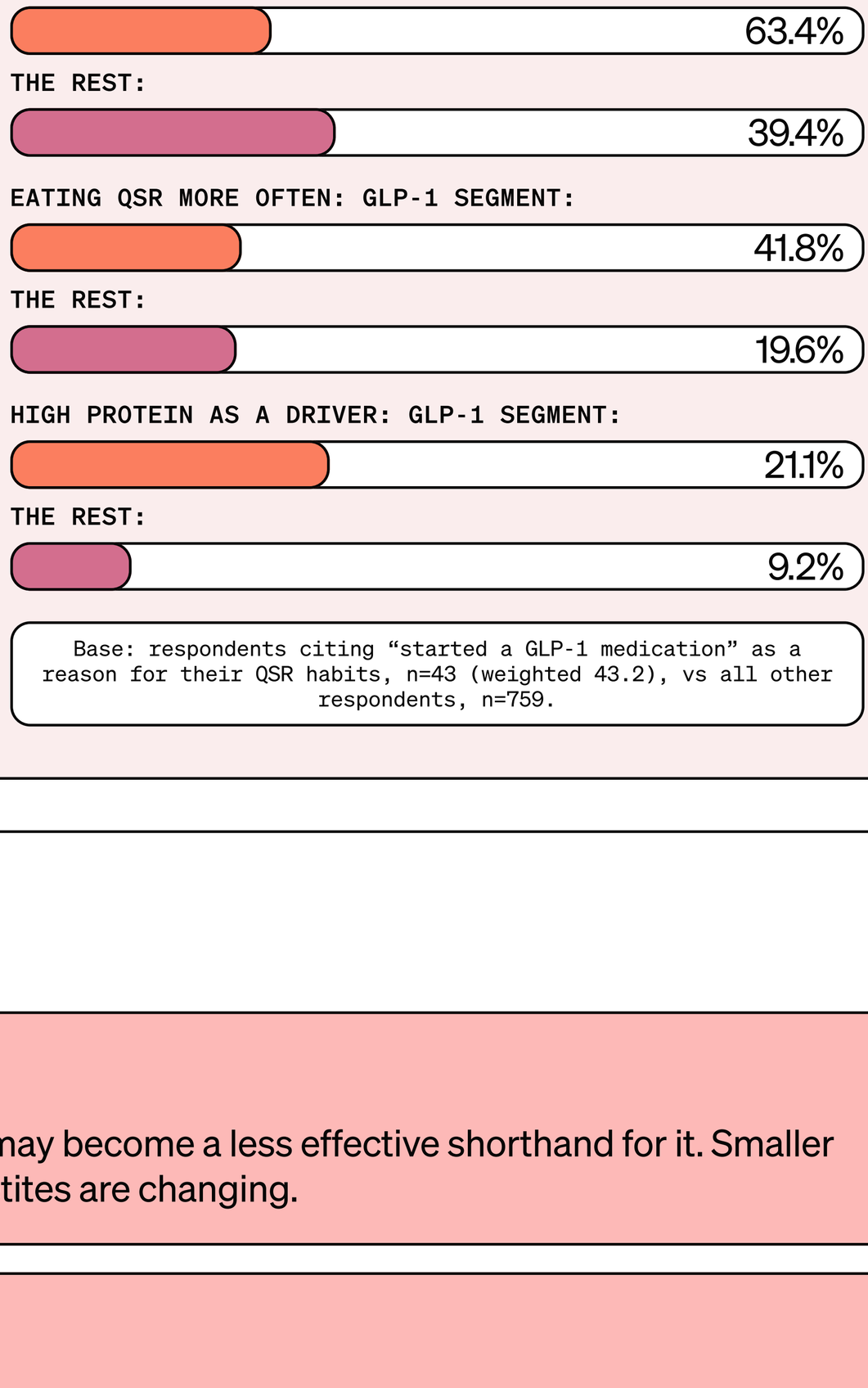
Protein stands out as another potential shift. It is a purchase driver for 21.1% of this group—more than twice the 9.2% among everyone else—although value remains the leading driver at 25.0%.

This group also over-indexes on coffee and bakery visits (52.5% vs 33.4%) and juice and smoothie venues (32.5% vs 20.0%), categories where protein and functional nutrition can fit naturally into an existing occasion.

> "I would like them to offer half portions but still at a reasonable price."
>
> FEMALE, 71, BABY BOOMER, GLP-1 MEDICATION USER, QSR SPEND UP

For a segment this small, these findings should be treated as directional. But they point to a potentially important shift in the meaning of QSR value: not simply more food for the money, but the right amount of food, stronger nutrition and a price that still feels fair.

The GLP-1 segment vs everyone else:



Base: respondents citing "started a GLP-1 medication" as a reason for their QSR habits, n=43 (weighted 43.2), vs all other respondents, n=759.

What This Means For Brands

Redefine value for a smaller appetite

Value remains the strongest driver in QSR, but bigger portions may become a less effective shorthand for it. Smaller meals at a proportionate price could better match the way appetites are changing.

Protect the core meal

Desserts and soft drinks are being cut before mains and combos. The opportunity is to make the core order work harder rather than relying on extras to build the basket.

Use protein as an added reason to choose

Protein matters more among consumers explicitly changing their behavior because of GLP-1s, but value remains their strongest driver. Protein can strengthen the proposition without carrying it alone.

Compete with the kitchen

When consumers cut back on fast food, eating at home is overwhelmingly where they go. QSR brands increasingly need to justify the convenience premium against a home-cooked alternative.

Ideally fielded the QSR Pulse study to 802 US adults on 30 July 2026. Unlike the other chapters in this series, respondents weren't screened by GLP-1 status. The 5.4% who explicitly cite starting a GLP-1 medication should therefore be treated as a conservative measure of direct medication influence.

GLP-1s are reshaping one of CPG's most fundamental assumptions: consumers will always have room for one more bite. As appetite changes, grocery baskets, eating occasions and purchase decisions change with it.

Reposition before you reformulate

Many of the products gaining momentum already exist. High-protein yogurt, fresh produce and smaller portions already align with changing consumer behavior.

Packaging, positioning and claims can often move faster than product development.



Design for the household

One in seven Americans now lives with a GLP-1 user, and those households are already buying differently. Behavior spreads through shared meals, grocery shops and daily routines, making the commercial opportunity far larger than the prescription base.



Build products that earn their place

Consumers are becoming more selective about every purchase. Protein, satiety and functionality are growing in importance, while larger portions and impulse purchases are under greater pressure.

Every product now competes for a smaller appetite. The brands that succeed will be the ones that give consumers the strongest reason to choose them.







TOM MORTON,
FOUNDER | NARRATORY CAPITAL

This is a quietly profound report.

Understanding who is in the orbit of GLP-1s - the considerers, the lapsed users, the people who live with users - reveals the full impact of the drug, and the paths in and out of it. GLP-1s are now in the lives of 60% of US adults.

The wide-angle lens sees 24% considering GLP-1s. Those that already have a user in their orbit are already following the patterns of the drug: more protein, less alcohol, smaller portions.

Surveying gets beyond the headlines to the real motivations. The people taking GLP-1s are 2.5x more likely to mention living longer healthy lives than looking good as the reason for using the drug. More than half cite doctors as an influence on their choice. Only 5% cite celebrities.

If you're in the category, you need to market to the halo, and manage the paths in and around the drug. If you're in the food, restaurant or hospitality business, you need to redesign for 60% of your audience.

This shows what happens when research becomes more accessible. You can ask bigger questions of bigger audiences. You're not limited to searching for your keys under the lamppost.



About the Research

This white paper forms part of Ideally's ongoing research series examining how GLP-1s are reshaping consumer behavior. Because these behaviors are still emerging, Ideally will continue to field new studies across the categories impacted. Findings will be updated and expanded as the series progresses.

Methodology

Ideally ran a nationally representative survey of 2,184 US adults in May 2026, capturing how people use, consider and live around GLP-1s across age, gender, income and household type. Respondents answered in their own words as well as to fixed questions, which is where the sharpest signal came from.

This report highlights where behavior is already shifting, where it's still forming, and where the change runs wider than the user count suggests. It's designed to be practical for marketers, brand and insights teams across food, drink, retail and adjacent categories, providing insights to sharpen positioning, rethink portfolios and stress-test where demand is heading.

For more information, visit: **goideally.com**

Notes and sources

Ideally GLP-1 study, May 2026. n=2,184 US adults, weighted to be nationally representative, fielded through Ideally. Segments: current user (10.4%), lapsed user (8.0%), considerer (23.9%), orbit non-user with someone in their circle on the drug (17.3%), clean non-user with no exposure (40.3%).

Taste preferences survey based on a nationally representative study of 1,095 US adults on 17 July 2026.