WHITE PAPER

The need for a consumer-centric understanding of weight management

By Russell Evans, Eric Swank and Harmandir Singh Bhasin

The U.S. weight management industry stands at the brink of unprecedented expansion, presenting immense opportunities for consumer-facing organizations. With more than 80% of U.S. adults classified as overweight or obese, the demand for weight management solutions is skyrocketing. Spending in this category, which reached $90 billion in 2023, is projected to double in the next decade.

The introduction of glucagon-like peptide-1 (GLP-1) medications has further accelerated this transformation, leaving companies across life sciences, food and beverage, and health and wellness industries grappling with critical questions about the weight management industry. They want to gauge its revenue potential, the effect on usage of existing products and services and how to best serve customers going forward.

Traditional research methods present limitations to understanding this complex and rapidly evolving market. Consumer needs are diverse and often stigmatized, and the landscape of available solutions is sprawling and cross-category. Weight management journeys often span years and thousands of interactions that are challenging to fully capture at scale. As a result, most organizations tend to focus on only a small portion of available marketplace opportunities.

However, organic online discourse through forums such as Reddit can provide the rich insights required to more deeply and comprehensively understand these consumers—when analyzed effectively. To do so, we used ZS Atlas Intelligence to rapidly mine these sources at scale and develop a holistic, consumer-centric understanding of the weight management category. Key implications for the industries that serve it were identified.

GLP-1s capture headlines but don’t tell the whole weight management story

Over the past couple years, rising public interest in appetite suppressants has fueled a considerable increase in social media conversations about weight management. Reddit alone is on pace to see 4.2 million comments related to weight management by the end of 2024, more than twice as many in 2022. Nearly half of that growth is driven by subreddits specific to appetite suppressants.

GLP-1s have generated tremendous buzz, serving as a rising tide that lifts all ships, and helped fuel significant increases in consumer demand across all facets of weight management. And while GLP-1s and other medical interventions dominate the headlines, they remain relatively nascent in this ecosystem with fewer than 5% of consumers hoping to lose weight using them today.

FIGURE 1: Comment volume share by weight loss solution

39% Daily habits

21% Physical activity

- 21% **Exercise activities** (e.g., weightlifting)
- <1% **Exercise equipment** (e.g., stationary bike)
- <1% **Gyms, plans and others** (e.g., Equinox)

18% Tracking

- 11% **Biometrics tracking** (e.g., glucose monitoring)
- 2% **Weight measurement** (e.g., estimating BMI)
- 6% **Apps, tools and devices** (e.g., MyFitnessPal)

55% Consumption habits

43% Diet planning

- 42% **General calorie management** (e.g., calorie counting)
- 1% **Named diets** (e.g., Whole30 and Atkins)
- <1% **Goal-setting tools** (e.g., TDEE calculator)

9% Food and beverage

- 8% **General food and beverage items** (e.g., eggs and carbs)
- 2% **Meal replacements** (e.g., SlimFast)
- <1% **Meal subscription kits** (e.g., Blue Apron)

2% Diet supplements

- 2% **Vitamins and minerals** (e.g., B12 supplements)
- <1% **Specialty supplements** (e.g., BCAA and psyllium husk)
- <1% **Gut health management** (e.g., probiotics)

6% Medical interventions

3% Appetite suppressants

- 2% **General GLP-1s** (i.e., unnamed)
- 1% **Named therapies** (e.g., Ozempic and Wegovy)

2% Therapy and support

- 1% **Medical consultations** (e.g., doctor's visit)
- <1% **Therapy** (e.g., CBT)
- <1% **Other support services** (e.g., injection technique)

0.4% Surgeries

- <1% **Restrictive surgeries** (e.g., bariatric surgery)
- <1% **Malabsorptive surgeries** (e.g., RNY bypass)
- <1% **Other surgeries** (e.g., liposuction)

Source: ZS Atlas Intelligence and Reddit discussion threads (January 2022 to April 2024)

Data shown as a share of comments mentioning any solution. A given comment or post may ultimately mention multiple solutions

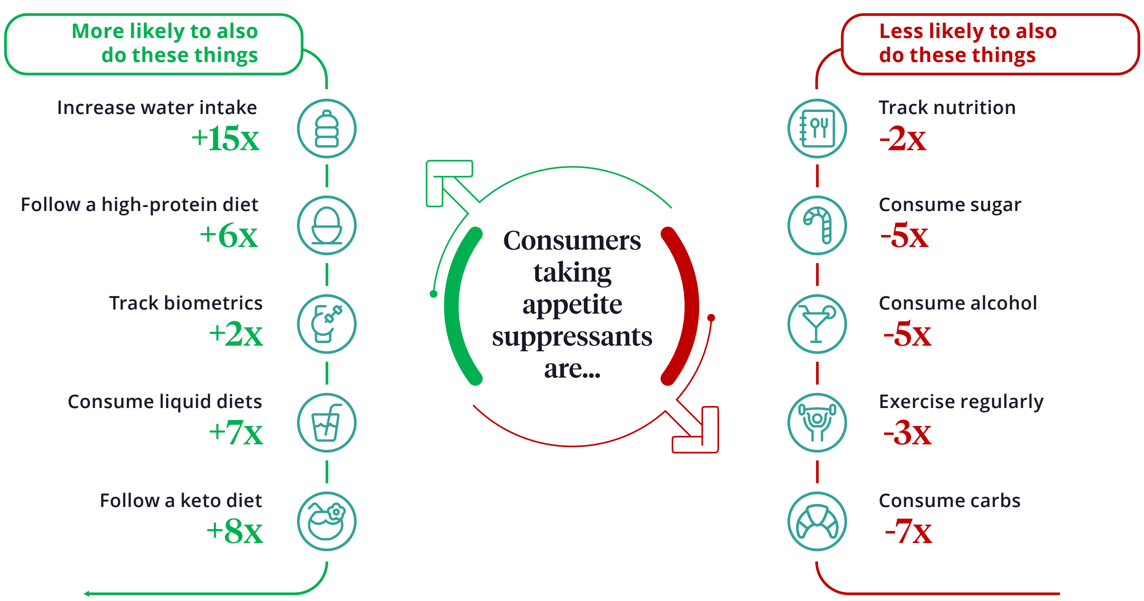
Weight management opportunities extend beyond helping consumers lose weight

At the highest level, many of the largest consumer weight management needs such as building muscle, managing appetite and improving mental outlook are reasonably well met. However, consumers are still searching for solutions that more effectively sustain weight loss over longer periods and help manage stress and fatigue, among myriad other unmet needs.

No weight management solutions perform perfectly, as consumer net sentiment is only 26%, on average, across solutions. Dietary supplements and physical activity receive the highest marks while medical interventions, including GLP-1s, are the least satisfying overall despite their effectiveness in appetite management and subsequent weight loss. Weight management needs extend beyond simply helping consumers lose weight. GLP-1 users face particularly tough trade-offs between finding their optimal dosage and balancing weight loss progress. They must navigate uncomfortable side effects such as fatigue, gastrointestinal distress, skin damage and muscle loss.

Our analysis also shows that these weight management solutions do not exist in a vacuum, and choices consumers make with one intervention can have notable impacts on their behaviors in other categories as well. For example, we see that GLP-1 users are more likely to increase consumption of water and "named" diets like keto while reducing consumption of sugar, alcohol and carbs. More concerning, though, GLP-1s may inadvertently inhibit key behavior changes required for long-term success such as tracking nutritional intake or participating in exercise.

FIGURE 2: Effect of GLP-1 usage on adjacent behaviors



Source: ZS Atlas Intelligence and Reddit discussion threads (January 2022 to April 2024)

Introducing the Demand Landscape

To navigate this complex ecosystem, brands need a more nuanced understanding of consumers' weight management motivations and their expectations from related products. These factors collectively shape how consumers evaluate their options and make decisions, defining the overarching Demand Landscape. Understanding these "jobs-to-be-done" is crucial for brands to effectively position themselves in this evolving market.

FIGURE 3: Weight management motivations

Why I want to be a healthy weight

Wellness 33%	**Appearance** 12%	**Socialization** 10%	**Vitality** 18%	**Health** 19%	**Mortality** 8%
To be the best version of myself with a healthier day-to-day lifestyle	To look my best physically by ridding extra weight	To reduce the negative effects of societal judgments of my weight	To be able to better navigate life and partake in activities I enjoy	To improve my physical health and minimize day-to-day discomfort	To extend my overall lifespan by reaching a maintainable weight
Sub-motivations	**Sub-motivations**	**Sub-motivations**	**Sub-motivations**	**Sub-motivations**	**Sub-motivations**
25% Achieve a healthier lifestyle	**9%** Moderate change in appearance	**10%** Reduce impact of social stigma	**10%** Improve physical capabilities	**12%** Address chronic medical issues	**8%** Address acute medical issues
5% Improved self-satisfaction	**3%** Significant transformation		**5%** Enhance basic mobility	**5%** Address acute or chronic pain	
			3% Increase energy levels	**2%** Prevent future medical issues	
				<1% Improve reproductive capability	
"Aiming to improve my quality of life by developing a positive relationship with food by not binge eating and addressing an overeating disorder."	"The transformation in my appearance has been striking. It's a complete overhaul of my appearance."	"I want to lose weight to better fit in my friend group and not have this awkward conversation over and over again."	"I exercised because I wanted to improve my cardiovascular health and muscle strength alongside moving around and walking better."	"I dealt with a lot of pain from being so heavy. Once I started losing weight, I just got really active because I finally could address the underlying chronic pain."	"My weight posed a serious threat to my heart and nearly led to kidney failure. Opting for surgery was a crucial decision."

Source: ZS Atlas Intelligence and Reddit discussion threads (January 2022 to April 2024)

Atlas Intelligence, we identified six macro weight management motivations, each comprising several sub-motivations, that explain what weight loss outcomes consumers are ultimately looking for. Figure 3 reveals that consumers view "weight management" as more complex than "weight loss." Grasping these underlying motivations is crucial to developing targeted products and crafting resonant messaging.

For example, consumers primarily motivated by appearance are more likely to place an outsized emphasis on outward signs of progress, such as waist size, or secondary considerations like skin blemishes. Those motivated by health show a bias toward unseen indicators such as biometric markers.

FIGURE 4: Weight management jobs-to-be-done

What I need help with

Job	%	Description	sub-jobs-to-be-done		Quote
Information and guidance	9%	Help me figure out what to do, where to start and why	**6%** Navigating the system	**3%** Wellness guides	"Navigating where to start was daunting. It is extremely difficult to get personalized education and support, which would help to find tailored workout routines."
Accessible techniques	20%	Make it easier for me to participate in weight management activities	**18%** Personalized solutions	**2%** Hassle-free options	"I need to figure out how to fit high-intensity interval workouts into my schedule to increase my energy levels and fat burn."
Pain-free solutions	12%	Options that make my weight management journey more enjoyable	**9%** Enjoyable options	**3%** Side effect management	"Small exercises, moving my body, dancing, walking, going to the gym and doing exercises that I enjoy works like magic for my weight loss journey."
Motivation and accountability	28%	Tools to stay consistent over time so that I can reach my goals	**16%** Tracking and measurement	**12%** Emotional support	"Making the right decisions day-in and day-out is challenging. I need something that will help me stay on track over time."
Physiological boost	26%	Solutions that improve how my body and mind react to diet and exercise	**23%** Biological adjustment	**3%** Effort amplification	"I needed my body's response to food and exercise to change. The tailored approach with GLP-1s and therapy helped me suppress cravings and manage my appetite effectively."
Rapid results	6%	Help me realize fat loss results without the normal wait time	**4%** Quick fix fat loss	**2%** Body sculpting	"I tried a 30-day crash diet of no sugar and carbs for quick results and did see a difference. However, I am looking for something that would yield even faster results to tone down my body even more."

Source: ZS Atlas Intelligence and Reddit discussion threads (January 2022 to April 2024)

Motivations alone, however, are not sufficient to prioritize high potential business opportunities. Our analysis also enabled us to identify six core macro jobs-to-be-done, each encompassing several micro roles that describe the discrete roles consumers seek out to support them on their weight management journey. And because consumers are likely to be solving for multiple jobs-to-be-done at various points along the way, understanding them is critical to informing the products and product attributes organizations need to provide.

For example, consumers with less experience managing their weight may find themselves overwhelmed with finding the guidance they need to make informed decisions. They may be more likely to seek solutions such as personal trainers, educational videos and off-the-shelf exercise routines or diet plans. Many consumers struggle to maintain behavior changes over long periods of time, so they seek emotional support groups or offerings that help motivate them and keep them accountable.

FIGURE 5: Sizing consumer-centric opportunities

Motivations
Why I want to be a healthy weight

Jobs-to-be-done
What I need help with

	Wellnes Be the best version of myself day to day	**Appearance** Look my best physically by ridding extra weight	**Socialization** Reduce societal judgments of my weight	**Vitality** Better navigate life and partake in activities	**Health** Improve my physical health	**Mortality** Extend my overall lifespan	**Job-to-be-done total**
Information and guidance	3%	1%	1%	2%	2%	0%	**9%**
Accessible techniques	**7%**	2%	2%	5%	4%	1%	**21%**
Pain-free solutions	3%	2%	2%	2%	2%	0%	**11%**
Motivation and accountability	**12%**	3%	3%	5%	4%	1%	**28%**
Physiological boost	**7%**	2%	2%	3%	**7%**	**4%**	**25%**
Rapid results	2%	2%	0%	1%	1%	0%	**6%**
Motivation total	**34%**	**12%**	**10%**	**18%**	**20%**	**8%**	**100%**

Source: ZS Atlas Intelligence and Reddit discussion threads (January 2022 to April 2024)

By integrating motivations into the jobs-to-be-done framework, we're able to develop a unified Demand Landscape to better identify and understand opportunities. Each demand intersection presents discrete opportunities for organizations to serve the consumers in this category, with products that match their distinct underlying needs, product preferences and existing levels of satisfaction.

And different solutions have substantially different "footprints" where they do and don't command significant market share. For example, while interest may exist elsewhere, GLP-1s have a concentrated footprint within the broader weight management universe. Nearly half of all usage is concentrated at the intersection of the health and mortality motivations and the physiological boost job-to-be-done (Figure 5). We anticipated increased penetration of these drugs, bolstered by improved supply chains, relaxed insurance coverage criteria and broader consumer awareness and adoption. Open questions remain about where and how they may expand into new intersections. The implications for other solutions currently occupying those spaces are yet to be fully understood.

Implications for consumer organizations at the intersection of weight management

GLP-1s are likely to create headwinds for a variety of industries based on the rise in demand for rapid weight loss and common side effects such as nausea, fatigue, skin health and muscle loss. However, the opportunity for consumer industries is much larger if they avoid fixating on GLP-1s and instead capitalize on the role they can play within and across the Demand Landscape more broadly.

Organizations serving these consumers should anchor their strategy on solving for specific pockets of demand. Laddering up benefits to broader motivations and anchoring solutions to give consumers a sense of control in managing their weight will be critical. Strategic partnerships may become increasingly valuable because no one company is likely to go it alone, given the breadth and complexity of needs weight-conscious consumers face. The Demand Landscape framework developed here can help us to identify and investigate key potential implications across industries and business functions.

USE CASE: FOOD AND BEVERAGE INNOVATION

Wellness

Food and beverage makers are now grappling with the medical weight loss trend. Some have already begun developing products tailored to these consumers' specific nutritional needs. Tools like our Demand Landscape can help companies assess opportunities in this space. They can explore products that could dominate the "accessible wellness" market to help consumers "be the best version of myself day to day" (Figure 5). Organizations can also gauge whether consumers will pay more for foods with optimized macronutrient profiles to meet their health goals.

USE CASE: CONSUMER HEALTH MARKETING

Appearance

Weight management consumers have diverse needs that overlap with traditional health products. GLP-1 drugs have amplified these demands, from enhancing skin health to managing fatigue. Consumer health companies can tap into this market by addressing “pain-free appearance” concerns to help people “look my best physically by ridding extra weight” (Figure 5). They can support customers throughout their journey, from tackling acne to minimizing stretch marks. For those using GLP-1s and experiencing rapid weight loss, specific needs like maintaining facial fullness present new opportunities. By focusing on these areas, brands can serve both general weight management consumers and those using medical interventions.

USE CASE: FITNESS BRAND POSITIONING

Vitality

Fitness brands can forge strategic partnerships with GLP-1 manufacturers to address muscle loss concerns and establish behavioral changes that prevent post-treatment weight regain. However, a larger market awaits those who position themselves as vitality specialists that help consumers “better navigate life and participate in activities” (Figure 5). By emphasizing accessibility, motivation and accountability, these organizations can uniquely serve health-conscious consumers, even if they’re not using medical therapies.

Developing consumer-centric strategies for growth in weight management

Organizations looking to capitalize on the unique opportunities the weight management category is anticipated to face will need to find ways to cut through the noise. This requires targeted strategies and investments centered on a current understanding of consumer demand. It also involves recognizing how their products and services fit into the broader consumer ecosystem. As the weight management industry continues to evolve and expand, companies that leverage advanced analytics and develop consumer-centric strategies will be best positioned to capitalize on the growing opportunities.

About the authors

Russell Evans is a principal in ZS's Chicago office and leads the B2C go-to-market practice area. He has extensive experience leveraging data and analytics as a foundation for growth strategies, new products and services, user experiences and cross-channel customer engagement. Russell has worked across a number of industries, including packaged goods, technology, retail and hospitality. Russell holds a degree with highest honors in ecology and evolutionary biology from Princeton University.

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