WHITE PAPER

What a consumer-centric view of obesity treatments can tell us about the future of GLP-1s

By Howard Deutsch, Russell Evans, Paul Bergen and Erik Swank

Since GLP-1s entered the spotlight in 2023 promising sustainable weight loss as high as 20%, they've sparked public interest like few drugs before them. But history won't judge their impact in clicks or TikTok views. It will judge them by how many people use GLP-1 receptor agonists and related incretins to improve health and extend lifespan by maintaining a healthy weight.

Given how consumer driven weight management is, it's critical for pharmaceutical companies to understand the motivations, behaviors and experiences of people who are trying to lose weight. While some consumers turn to GLP-1s and other medications to meet their weight management goals, far more currently use nonmedical interventions such as diet and lifestyle changes, fitness tracking and supplements. After all, consumers have been trying to lose weight long before effective drugs came along, and those methods didn't disappear with the emergence of GLP-1s. Even in this "Ozempic era," only 6% of U.S. adults are using a GLP-1.

By contextualizing where GLP-1s fit within the overall picture of weight loss solutions today, pharmaceutical companies can fine-tune their product development, direct-to-consumer and healthcare provider (HCP) marketing strategies and more—while also improving population health outcomes by aligning future weight management solutions with existing consumer demand.

Using Atlas Intelligence, ZS's proprietary AI-powered consumer intelligence platform, we set out to take a holistic examination of the weight management category to uncover key insights and opportunities for companies that operate in this space today or aspire to do so in the future.

The demand landscape for GLP-1s such as Zepbound and Wegovy

GLP-1s aren't just one weight management solution among many—they're among the costliest and hardest to access. Understanding how healthcare consumers think about weight management—and therefore how a pharma company's solutions either do or do not address consumer needs—is essential.

To do this, we first identified six "jobs to be done" (JTBD)—the attributes (or "jobs") consumers seek in a weight management solution (Figure 1). JTBD is commonly used in technology and software development, consumer goods and other fields to describe the diverse and evolving goals consumers have for using a product or service. We then analyzed more than 1.4 million Reddit comments across 35 "subreddits" (topic-based sections of Reddit, the popular content platform that is the world's 10th most visited website) related to weight loss and weight management to see understand the prevalence of each JTBD (Figure 1).

FIGURE 1:

Weight management “jobs to be done”

Jobs-to-be-done: “What I need help with”

Information and guidance	9%	Help me figure out what to do, where to start and why	Sub-JTBD	6%	Navigating the system	3%	Wellness guides
Accessible techniques	20%	Make it easier for me to participate in weight-management activities	Sub-JTBD	18%	Personalized solutions	2%	Hassle-free options
Pain-free solutions	12%	Help make my weight management journey more enjoyable	Sub-JTBD	9%	Enjoyable options	3%	Side-effect management
Motivation and accountability	28%	Help me stay consistent so I can reach my goals	Sub-JTBD	16%	Tracking and measurement	12%	Emotional support
Physiological boost	26%	Help me improve how my body and mind react to diet and exercise	Sub-JTBD	23%	Biological adjustment	3%	Effort amplification
Rapid results	6%	Help me realize results without the normal wait time	Sub-JTBD	4%	Quick-fix fat loss	2%	Body sculpting

ZS Atlas Intelligence – 2024 weight management universe point-of-view | Source: Reddit Data (January 2022-April 2024)

From this analysis, we identified six general motivations (and many more sub-motivations) consumers express for managing their weight, ranging from reducing social stigmatization (10%) to aspiring to be their best selves by adopting healthier habits (33%). Motivations can be seen in Figure 2.

FIGURE 2:

Weight management motivations

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 shedding extra weight	To reduce the negative effects of societal judgments of my weight	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 • Achieve a healthier lifestyle • Improved self-satisfaction	Sub-motivations • Moderate change in appearance • Significant transformation	Sub-motivation • Reduce impact of social stigma	Sub-motivations • Improve physical capabilities • Enhance basic mobility • Increase energy levels	Sub-motivations • Address chronic medical issues • Address acute or chronic pain • Prevent future medical issues • Improve reproductive capability	**Sub-motivation** • Address acute medical issues

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To visualize opportunities for weight management solutions and uncover unmet consumer needs, we then developed a demand landscape framework that analyzes how consumer motivations for losing weight intersect with the JTBD. The matrix shown in Figure 3 clarifies what had been a murky picture of the weight management demand landscape.

FIGURE 3:

Consumer demand for weight loss solutions

Motivations: "Why I want to be a healthy weight"

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

	Wellness	Appearance	Socialization	Vitality	Health	Mortality
Information and guidance	3%	1%	1%	2%	2%	0%
Accessible techniques	7%	2%	2%	5%	4%	1%
Pain-free solutions	3%	2%	2%	2%	2%	0%
Motivation and accountability	**12%**	**3%**	3%	5%	4%	1%
Physiological boost	7%	2%	2%	3%	**7%**	**4%**
Rapid results	2%	2%	0%	1%	1%	0%

ZS Atlas Intelligence – 2024 weight management universe point-of-view | Source: Reddit Data (January 2022-April 2024)

The heterogeneity of consumer demand for weight management solutions is notable but not surprising. After all, weight management is a lifelong endeavor, so it makes sense that consumer motivations and needs shift over time.

Looking at consumer satisfaction across the demand landscape (Figure 4), it's lowest among those looking to lose weight for social reasons and those looking to improve health and extend life by improving how their bodies and minds react to diet and exercise.

FIGURE 4:

Consumer satisfaction across the demand landscape for weight management

Motivations: "Why I want to be a healthy weight"

High satisfaction | Low satisfaction

Jobs-to-be-Done: "What I need help with"

	Wellness	Appearance	Socialization	Vitality	Health	Mortality
Information and guidance	41%	38%	28%	46%	27%	29%
Accessible techniques	38%	35%	24%	40%	25%	23%
Pain-free solutions	45%	43%	32%	48%	33%	29%
Motivation and accountability	39%	37%	26%	42%	28%	28%
Physiological boost	34%	37%	22%	40%	22%	13%
Rapid results	42%	34%	16%	39%	26%	23%

ZS Atlas Intelligence – 2024 weight management universe point-of-view | Source: Reddit Data (January 2022-April 2024)

By superimposing current GLP-1 usage onto this framework, we see that prevailing consumer sentiment is lowest precisely where GLP-1 usage is highest: among consumers seeking a "physiological boost" to improve health and extend lifespan (Figure 5).

FIGURE 5:

Consumer satisfaction with GLP-1s compared with other weight management solutions

Motivations: "Why I want to be a healthy weight"

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

	Wellness	Appearance	Socialization	Vitality	Health	Mortality
Information and guidance	1%	<1%	<1%	<1%	3%	<1%
Accessible techniques	1%	<1%	<1%	1%	4%	1%
Pain-free solutions	1%	1%	<1%	<1%	3%	1%
Motivation and accountability	2%	1%	1%	1%	5%	1%
Physiological boost	8%	4%	3%	3%	36%	12%
Rapid results	1%	1%	<1%	1%	1%	<1%

= Percent of all topic volume by demand landscape intersection with GLP-1 data (n=32K)

ZS Atlas Intelligence – 2024 weight management universe point-of-view | Source: Reddit Data (January 2022-April 2024)

This analysis reveals that, despite dominating headlines and generating buzz since at least 2023, GLP-1s address just a sliver of the overall weight management market—primarily those seeking to improve physical health and extend lifespan. Even within this niche, GLP-1s only capture about 20% of the market. Interestingly, this minority of consumers—those aspiring to improve health and longevity by changing their response to diet and exercise—report some of the lowest satisfaction levels with existing weight management solutions, including GLP-1s.

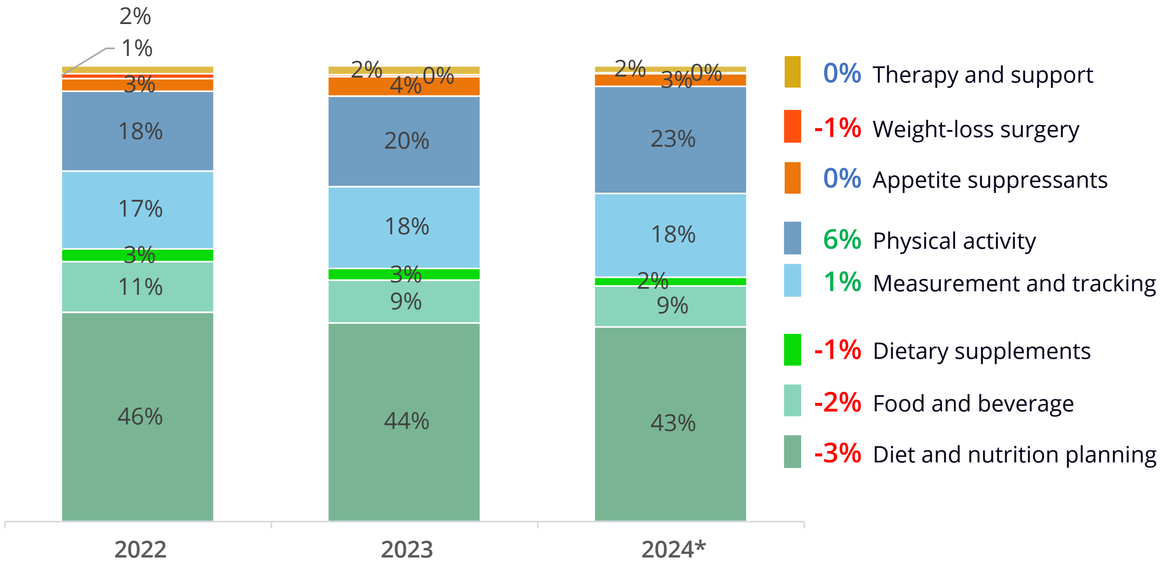
Why so low? While users appreciate these drugs' ability to curb cravings and boost energy, they continue to struggle to achieve sustainable weight loss, manage side effects and gain and maintain access to medication. By understanding these unmet consumer needs, and their underlying motivations, pharma can draw a roadmap for future product development, consumer messaging and potential partnerships.

GLP-1s dominate headlines but not consumer sentiment toward weight loss medications

Turning again to Reddit, we looked at "share of voice" over time across thousands of weight loss solutions across eight broad categories. Measured by consumer mentions of specific solutions, GLP-1s such as Wegovy and Zepbound rank a distant fifth, trailing diet, exercise, fitness tracking and solutions like meal replacements and meal subscription kits (Figure 6).

FIGURE 6:

GLP-1s share of voice among weight management solutions



ZS Atlas Intelligence – 2024 weight management universe point-of-view | Source: Reddit Data (January 2022-April 2024)

GLP-1s' significant access barriers, which put them out of reach for millions of patients who might otherwise benefit, don't help. And when analyzing overall consumer sentiment, GLP-1s rank second from the bottom. While this likely reflects a mix of individual consumers' context and this drug class's performance, the sentiment gap between GLP-1s and other weight management approaches (such as diet and exercise, meal planning and fitness tracking) is significant.

2 areas of opportunity for weight loss medications such as GLP-1s

Equipped with a more holistic, customer-centric view of the weight management landscape, pharma companies should carefully consider where and how to position themselves in this market. Here are two clear growth opportunities the data reveals:

No. 1: Doubling down on health-oriented motivations. Demand in this segment is high, with 11% of consumers seeking to address health concerns by altering how their body and mind respond to diet and exercise. About 13% of these consumers are taking a GLP-1 (representing roughly half of all GLP-1 usage), but satisfaction among those seeking a "physiological boost," either via GLP-1s or otherwise, is a disappointing 20%. Although GLP-1s "ace" users' top stated need—appetite suppression—they underdeliver on secondary needs such as preventing weight regain, increasing energy levels and staying motivated.

To drive better penetration with healthcare consumers searching for a physiological lift, pharma companies should focus on addressing these unmet needs and helping customers navigate known pain points such as managing side effects.

No. 2: Expand the frame to include wellness seekers. Pharma companies traditionally have avoided the wellness space, but, given GLP-1s' low penetration among consumers seeking general wellness, they may wish to reconsider. This is especially true given that our analysis reveals wellness as consumers' top motivation for maintaining a healthy weight, outpacing health seekers by a factor of two. If pharma chooses not to pursue these consumers, they may consign themselves to passively waiting for consumers to begin prioritizing health as their motivation for losing weight and seeking out solutions that provide the physiological boost to do so. Given the number of industries weight management touches, pharma can't always expect to be the dominant voice pushing to shift consumers' mindset.

Demand among wellness seekers is high, with 12% seeking holistic wellness through motivation and accountability. Yet, satisfaction remains relatively low, with 60% unhappy with current solutions. Only about 1% of these consumers use GLP-1s for weight management today. While GLP-1s underdeliver on their primary need—nutrition—they excel in providing secondary benefits such as supporting endocrine health and improving one's general outlook.

To increase market share with these consumers, drugmakers could explore partnerships with companies offering complementary solutions that bridge the gap between GLP-1s' strengths and unmet consumer needs GLP-1s are less equipped to address, such as nutrition and motivational support. They could also emphasize messaging that highlights secondary benefits these consumers value, including enhanced overall health and overcoming weight-loss plateaus.

Bringing a consumer-centric lens to obesity treatments, GLP-1s and population health

While analysts forecast the global market for GLP-1s to grow to $150 billion per year, significant hurdles must be overcome for these lofty projections to materialize. Access barriers and supply shortages have been well documented, but this research uncovers less obvious challenges: poor consumer sentiment, which limits penetration among those seeking the health benefits of weight loss (GLP-1s' ideal target) and sluggish uptake by those pursuing the wellness benefits of maintaining a healthy weight. This doesn't even account for the opportunity for consumers who are motivated by improving their appearance or their vitality and overall physical capabilities.

Expanding GLP-1s' reach will require pharma companies to rethink their product development, partnership strategies and consumer marketing approaches. New products that address GLP-1s' known limitations, consumer-centric marketing that highlights alternative drug attributes and partnerships with digital health and other nontraditional players—pharma may need to pull all these levers to unlock GLP-1s' full potential.

Of course, expanding GLP-1s' reach beyond their traditional stronghold will do more than tap into a $150 billion market—it'll unlock the potential of this drug class to deliver transformative health outcomes on an unprecedented scale by addressing consumer motivations and JTBD across the weight management journey.

About the authors

Bill Coyle is the global head of biopharma at ZS, where he helps shape the firm's perspective on the industry's future and leads ZS engagements with a variety of global clients. His expertise spans topics across the pharmaceutical and biotech sector, including asset development and early commercialization, value and access and key account development. Having split his time at ZS between the U.S. and Switzerland, his expertise spans the U.S. and key European and global markets.

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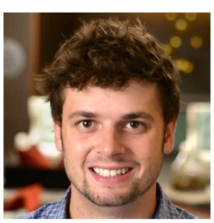

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