



AFFLUENT GLP-1 SHOPPERS*

How Do Affluent GLP-1 Shoppers Navigate the Snack Aisle Differently?

Insights from the USA

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*GLP-1 (glucagon-like peptide-1) is the broadly used term for medications that include popular brands like Ozempic

The Ozempic-era supermarket aisle is a very different place.

From Coles and Woolworths to fast food chains, a phalanx of thinner and healthier customers are forcing a rethink of what products are going to sell.”

(AFR, Carrie LaFrenz and Simon Evans, Mar 13, 2026)

FINANCIAL REVIEW

From the article:

“We’re seeing a huge trend from customers generally around healthful eating,” says Leah Weckert, the Chief Executive of Coles.

“We are looking at that customer and seeing this behavioural change as there is a bit of a generational shift into healthful eating. We’re excited by that. We think that’s a really big opportunity...”

It’s estimated that approx. 500,000 Australians are on GLP-1 medications - over 2% of Australia’s adult population. Sales of GLP-1 medications have increased tenfold in the last 5 years, with strong growth predicted to continue

How do users of GLP-1 meds shop? These meds suppress appetite and slow digestion. As appetites drop, users buy smaller portions, fewer items and shop less – with a greater focus on nutrition per bite.

GLP-1 SHOPPERS IN THE USA

What data was used in this report?

Time Period: Rolling Year thru Q2 2025
(July 2024 – June 2025)

USA Snacking Department* Shoppers
Affluent Shoppers (\$100k+ HH income)

Sample Size – 3,918 shoppers:
780 GLP-1 and 3,138 non GLP-1 shoppers

***Snacking Department includes 10 categories :**

Checkout Chocolate, Checkout Gum & Mints, Cookies, Energy & Protein Bars, In Aisle
Chocolate, In Aisle Gum & Mints, Salty Snacks, Snack Crackers, Snack Nuts, Sugar Candy

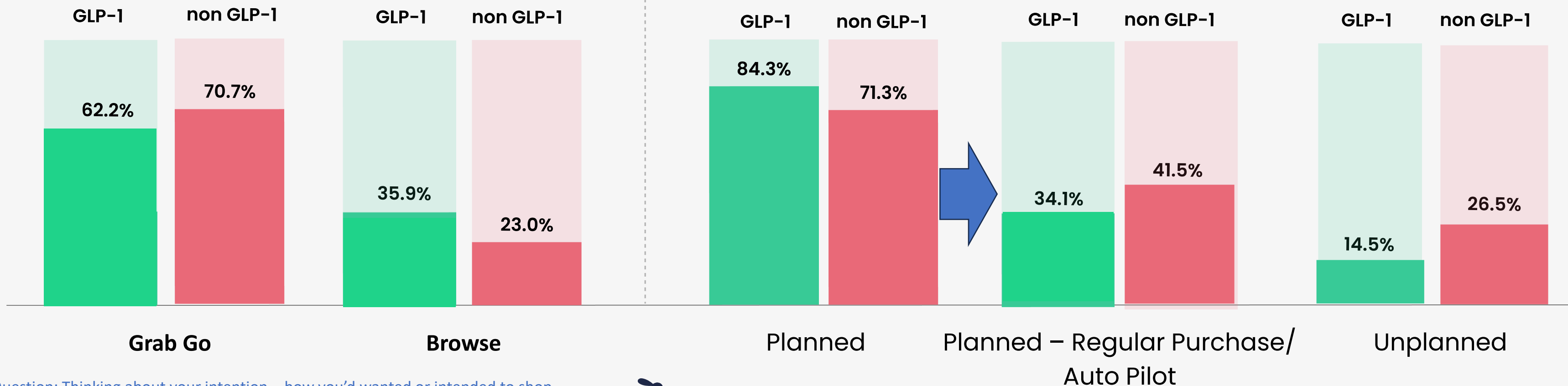


GLP-1 SHOPPERS PLAN BUT STILL LIKE TO BROWSE: RIPE FOR PRE-TRIP INFLUENCE

GLP-1 shoppers are more open to browsing Snacking and spend more time on their purchase. While they tend to plan category trips, they're less certain about specific items and are strongly influenced by pre-trip promotions, media, and online content.

How do you prefer to shop the category?

Purchase Triggers Planned & Unplanned Reasons



Question: Thinking about your intention – how you'd wanted or intended to shop for CATEGORY at RETAILER.

Question: Did you specially plan to buy CATEGORY before you went to the store? What triggered you to buy?



GLP-1 SHOPPERS THREE TIMES AS LIKELY TO WALK AWAY CONFUSED OR OVERWHELMED

High leakage for Snacking GLP-1 shoppers. Despite spending more time browsing, many abandon purchases due to frustration, confusion, and unmet needs. Better education, inspiration, and a smoother experience are key opportunities.

Leakage Reasons	GLP-1	non GLP-1
Category layout was confusing	26.9%	8.5%
Category was too overwhelming	34.3%	10.7%
I couldn't find the specific product I wanted	18.7%	12.6%
The specific product I wanted was not instock	32.4%	21.3%
I left because of another reason	23.9%	12.1%
Shoppers who have left their category purchase in the last months.	77.6%	44.5%

Desired Improvements Top Priority	GLP-1	non GLP-1
Ease Of Shop	11.5%	8.2%
Shelf Signage	9.1%	5.8%
Theatre	10.9%	6.7%
Information	13.5%	4.9%
Improvement Needed	83.6%	57.5%

Question: Apart from Price, if you had to improve CATEGORY in RETAILER, which ones would you choose?

Question: In the last months when shopping for CATEGORY at RETAILER have you ever left a store or website without buying product because of the following experiences? Select all that apply?

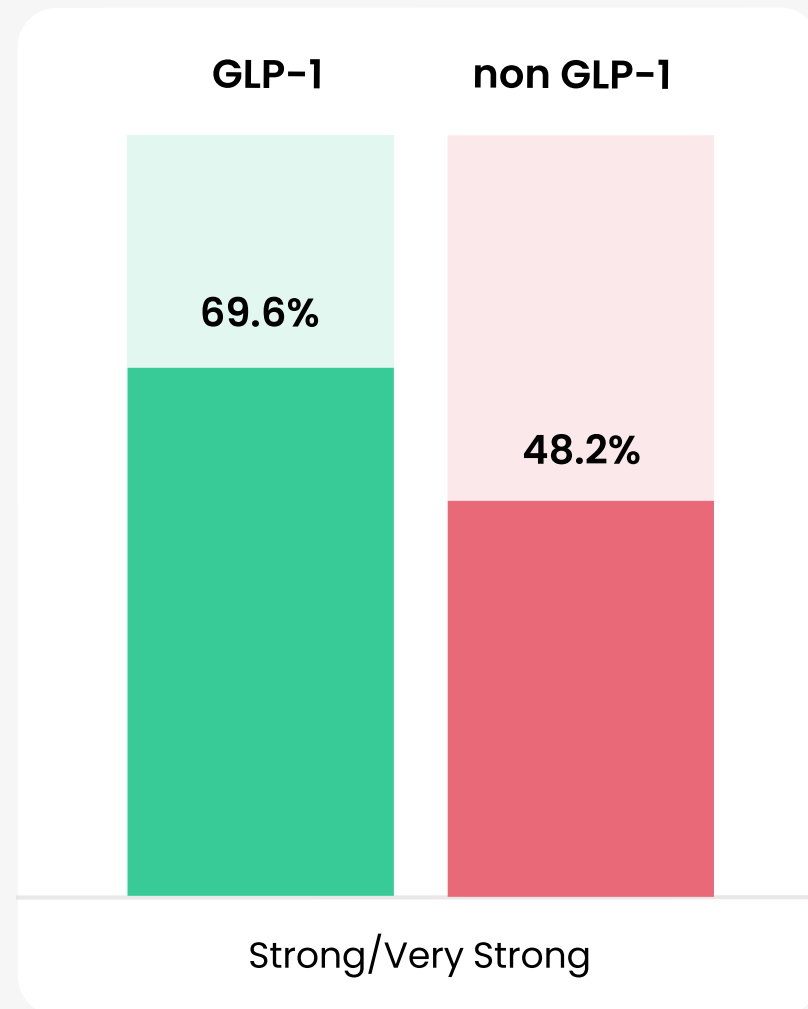




PRICE & VALUE DRIVE MORE SWITCHING AMONG GLP-1 SNACK SHOPPERS

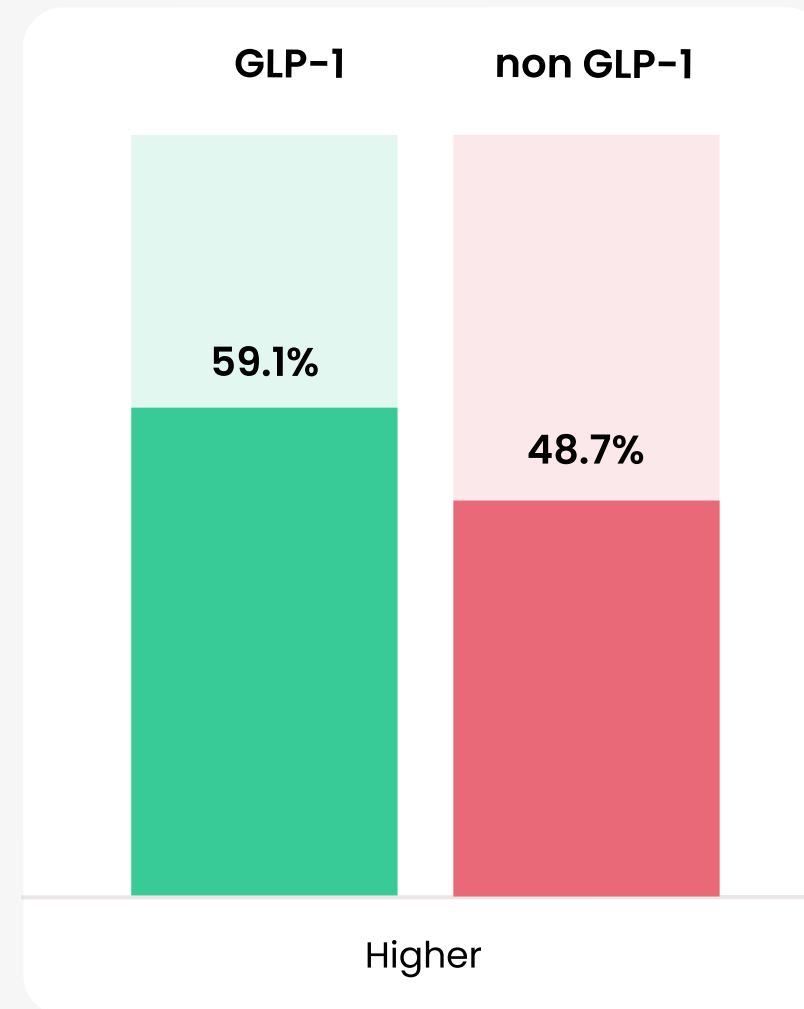
Price plays a stronger role for GLP-1 shoppers. They're noticing increases, more likely to switch brands, and open to Private Label in Snacking. Emphasizing price/value at Point of Purchase is key.

Role of price in purchase decision



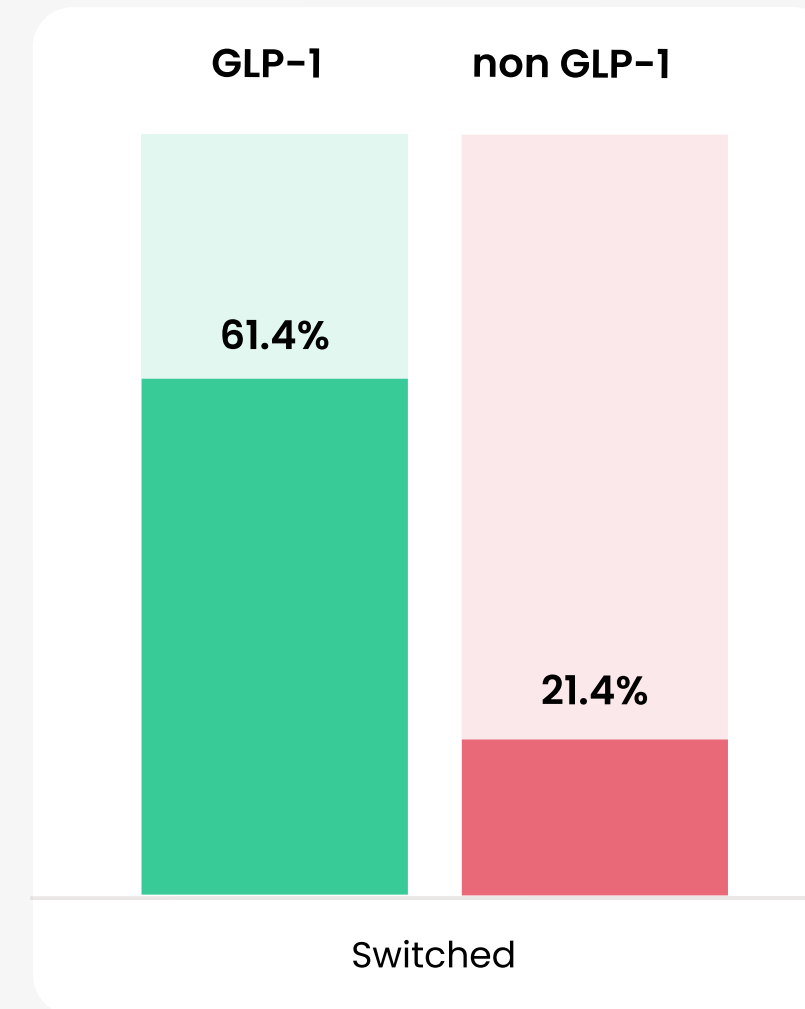
Question: What role does price play in your purchase decision? % of shoppers who scored 4 or 5 out of 5.

Price Perception



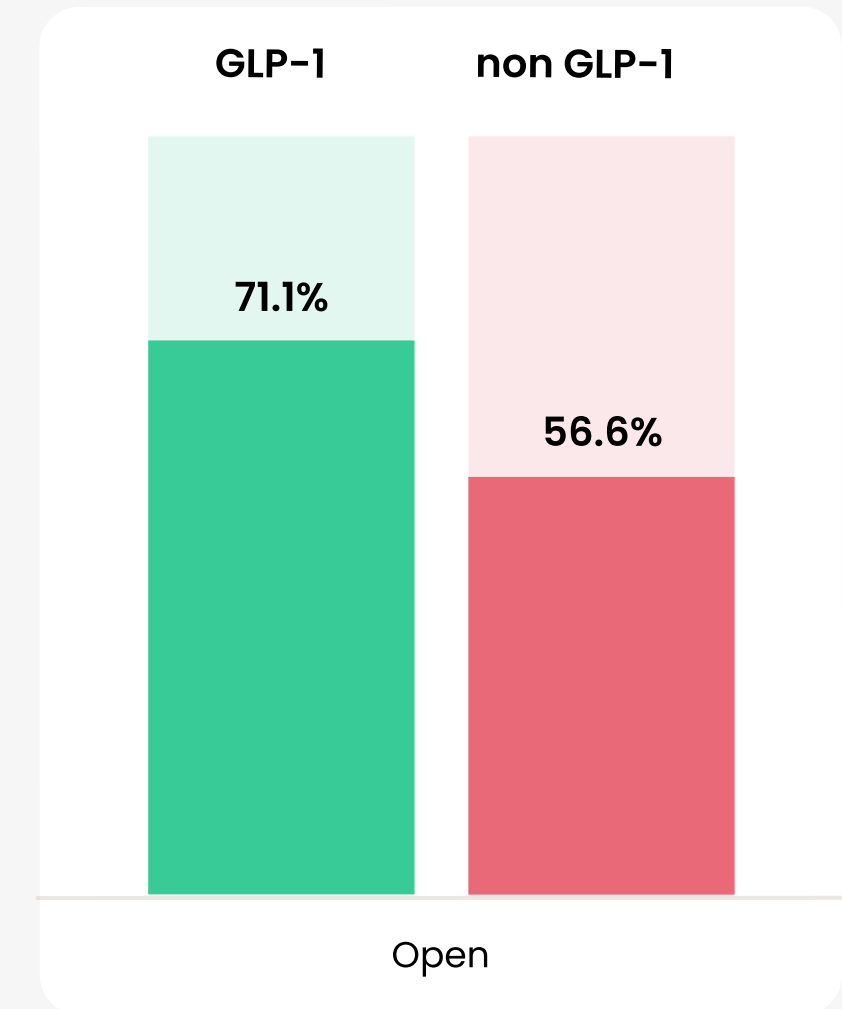
Question: How do prices today compare to what you normally see in CATEGORY

Switched brand due to price



Question: Have you switched recently to a different brand in CATEGORY due to price?

Open to buying Private Label



Question: I'm usually willing to consider RETAILER own label products in the CATEGORY

Opportunities for Snack Brands & Retailers:

- 1. Pre-Trip & In-Store Influence:** GLP-1 snack shoppers are planning to buy the category but browse more and are more promotionally incentivized. Use digital media, shelf messaging and inspiration to capture them before/during the trip.
- 2. Simplify & Support the Aisle:** High leakage shows they get overwhelmed or can't find what they want. Improve layout, signage and at shelf education to reduce frustration and abandonment.
- 3. Value & Private Label Strategy:** GLP-1 Shoppers are more price-sensitive and open to store brands. Highlight price/value messaging and extend “better-for-you” private label options to win switching shoppers.

Building the best and most persuasive category strategy starts here!

Get in touch today:



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