

The Next Wave of GLP-1 Users

Who are they? What do they buy? Where do they shop? ...
from apparel to groceries to restaurants and more

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OPTIMAL

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GLP-1 users differ meaningfully from the national population across demographics, behaviors, and consumer preferences

Key findings:

GLP-1 customers skew significantly older (55+ at 48% vs. 38% nationally), with Baby Boomers and Gen X over-indexing and Millennials heavily under-indexing (Index 46)

Hispanic consumers are strongly over-represented (28% vs. 16%, Index 171), concentrated in the South (Index 129). The West significantly under-indexes (Index 62)

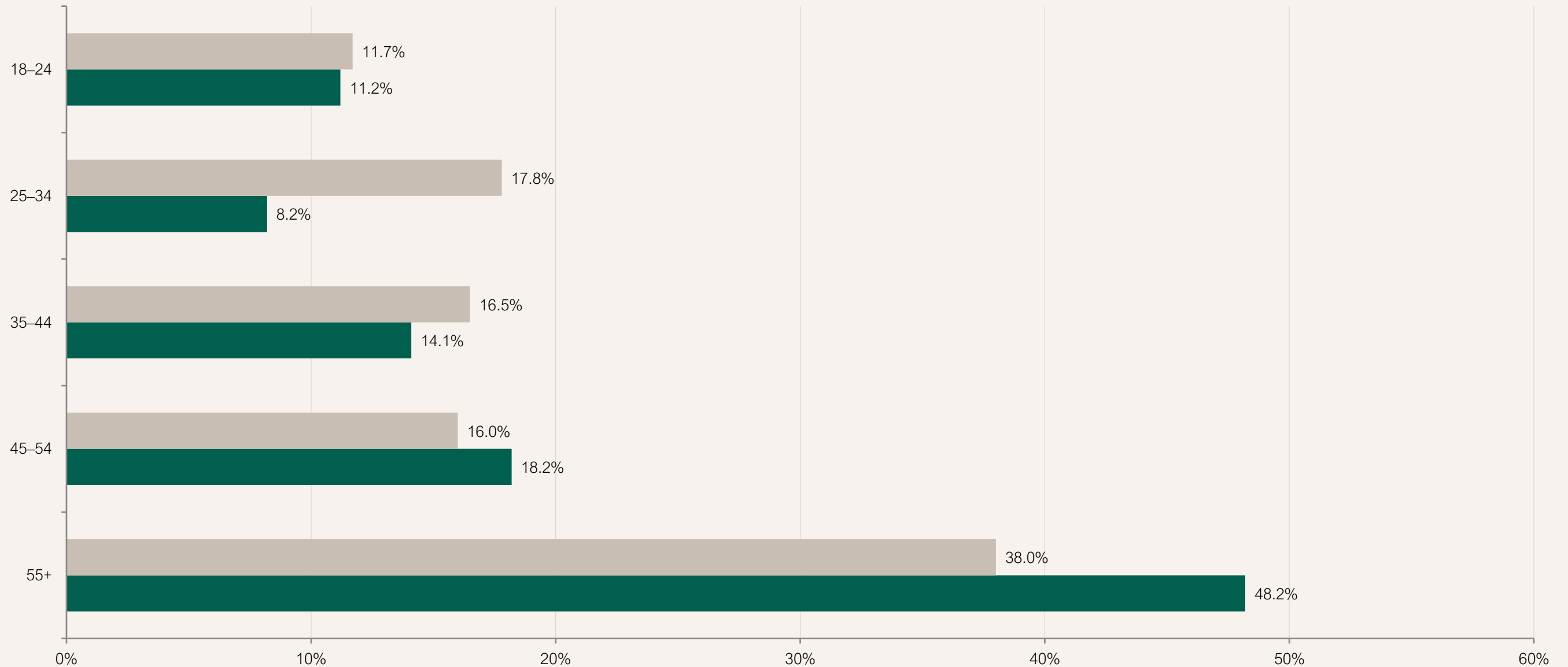
Customers are more likely to be married, earn higher incomes (nearly 3× more likely to earn \$200K+), and receive government benefits (49% vs. 33% nationally, Index 150)

66% of customers do not drink alcohol (vs. 50% nationally, Index 131) — consistent with known GLP-1 appetite/craving suppression effects. Non-alcoholic spirits and diet beverages over-index significantly

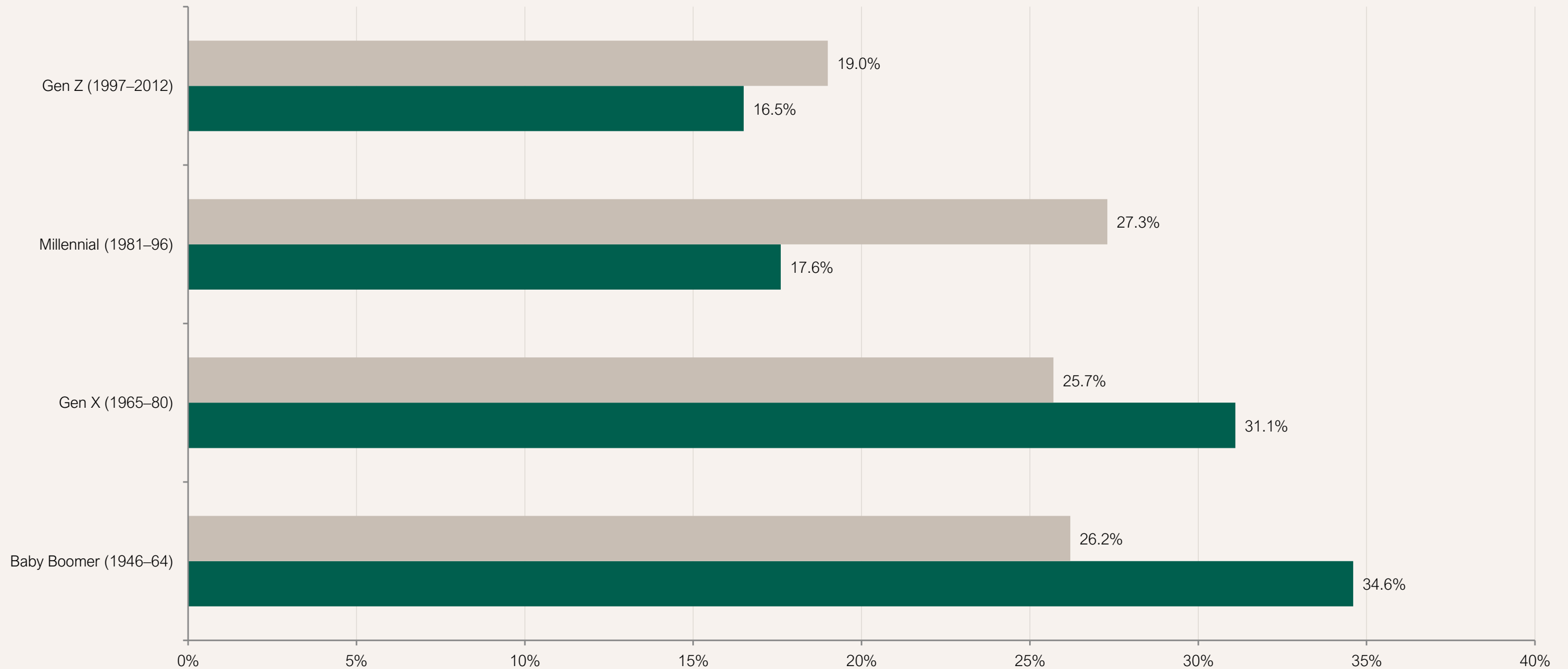
Gambling, fast casual dining, and Wingstop show outsized affinity. Wingstop indexes at 436 — customers pick it at 4.4× the national rate

Demographics

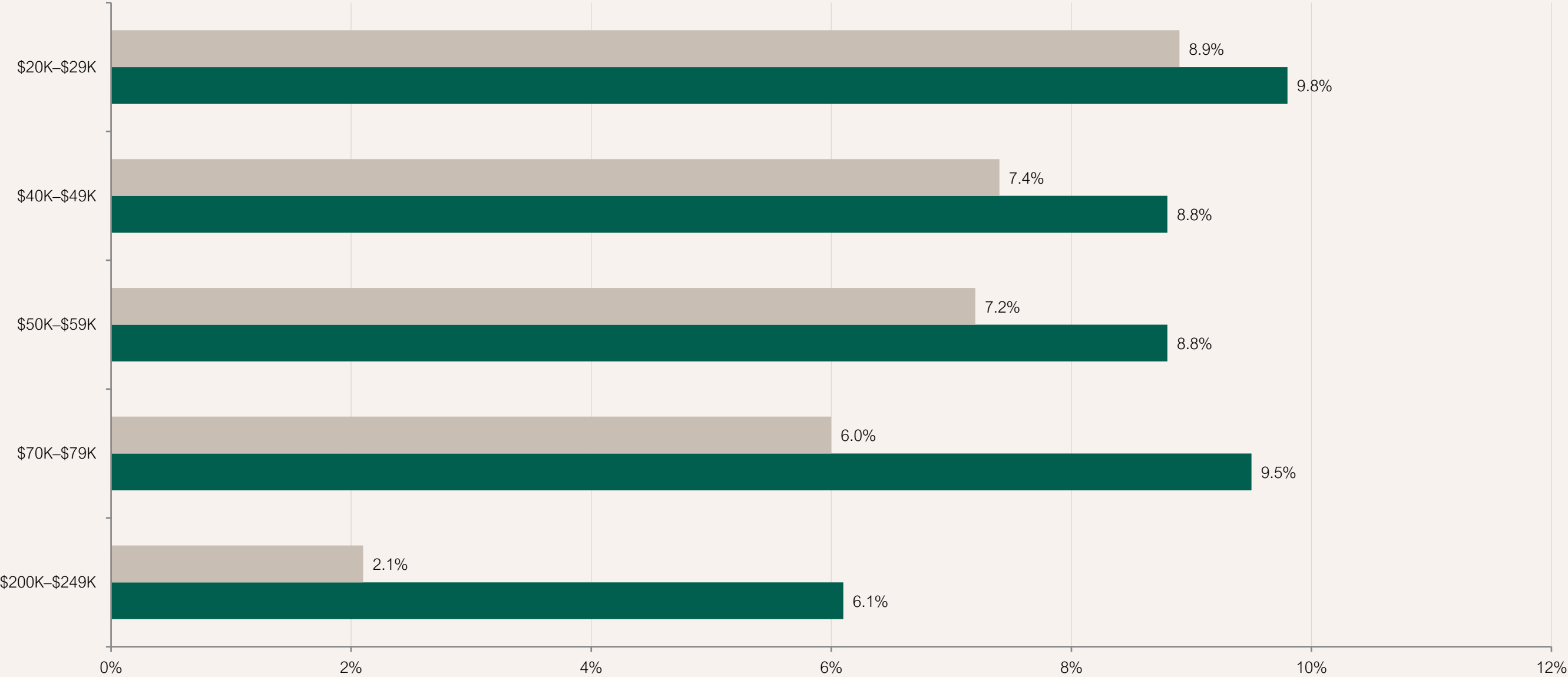
GLP-1 customers skew significantly older — 55+ represents 48% vs. 38% nationally. Millennials dramatically under-index (Index 46)



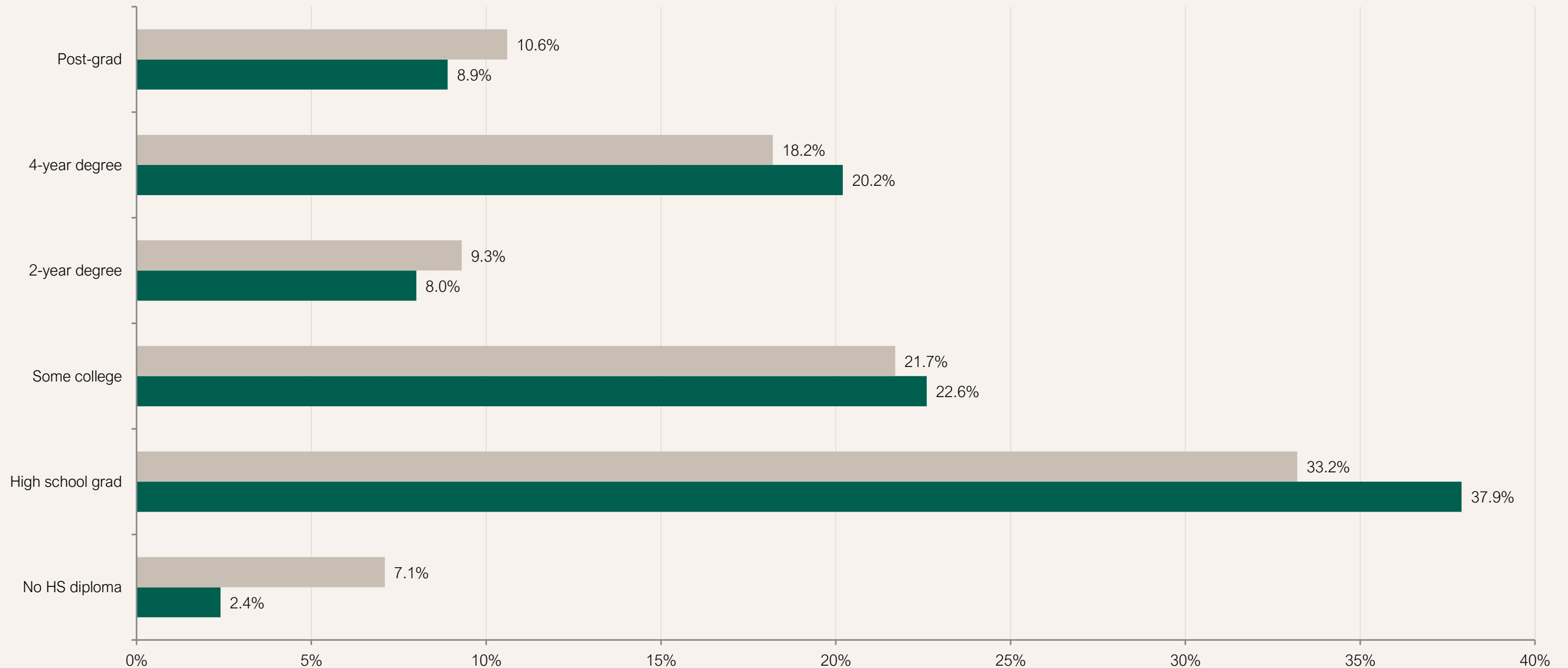
Baby Boomers and Gen X over-index sharply. Millennials represent only 17.6% of GLP-1 customers vs. 27.3% nationally (Index 65)



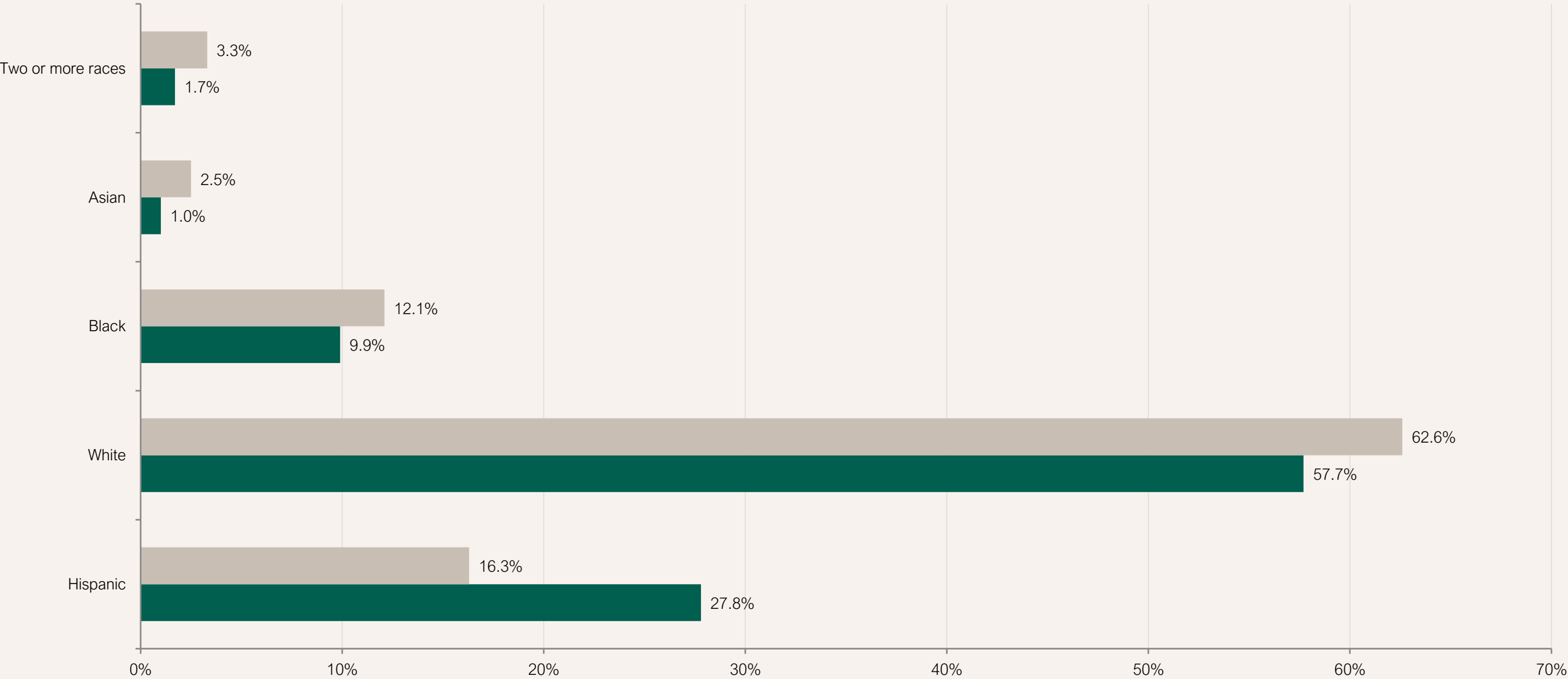
GLP-1 customers over-index at \$200K+ income — nearly 3× the national rate. The customer base spans middle and upper-middle income brackets



Customers are significantly less likely to lack a high school diploma (Index 34). High school graduates and 4-year degree holders modestly over-index



Hispanic consumers represent 27.8% of GLP-1 customers vs. 16.3% nationally (Index 171). Asian consumers significantly under-index (Index 41)



Still a Southern & Midwestern bias in relative adoption, but the coasts are catching up

State of Residence	All Respondents	Current GLP1 Customers	Former GLP1 Customers
California	10%	10%	6%
Texas	9%	10%	8%
Florida	7%	8%	8%
New York	7%	6%	7%
Pennsylvania	4%	8%	5%
Ohio	4%	3%	2%
Illinois	4%	4%	2%
Georgia	3%	3%	4%
Michigan	3%	3%	5%
North Carolina	3%	2%	4%
Arizona	3%	1%	3%
New Jersey	3%	2%	3%
Washington	3%	1%	2%
Virginia	2%	3%	2%
Indiana	2%	3%	4%
Missouri	2%	2%	4%
Colorado	2%	1%	2%
Tennessee	2%	3%	3%
Massachusetts	2%	2%	1%
Wisconsin	2%	1%	1%
Oregon	2%	1%	1%
Minnesota	2%	1%	1%
South Carolina	2%	0%	2%
Alabama	1%	1%	1%
Maryland	1%	3%	1%

California has the most progression in GLP-1 usage, while Texas and Pennsylvania are rising in the next wave

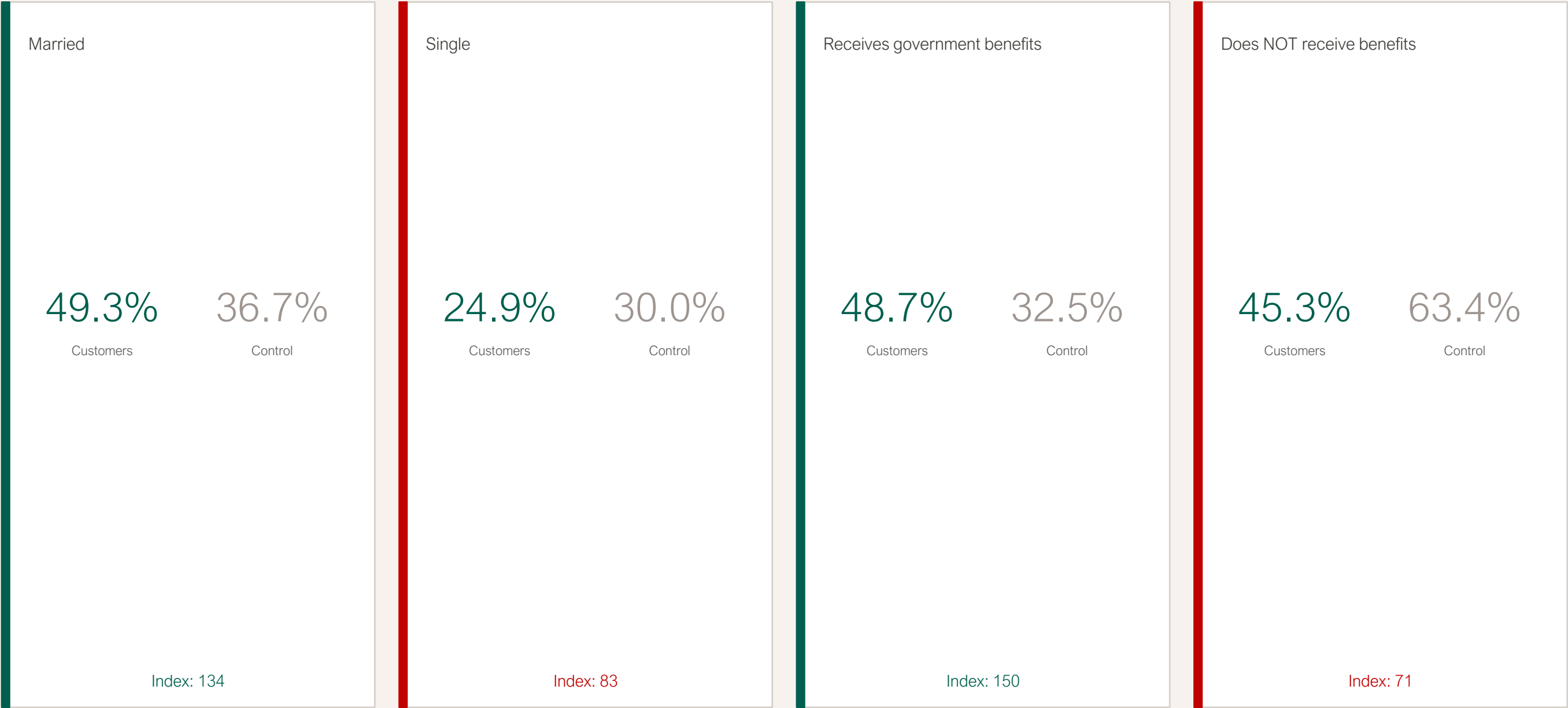
State of Residence	Current GLP1 Customers	Former GLP1 Customers	Current Vs Former
California	10%	6%	4%
Pennsylvania	8%	5%	3%
Texas	10%	8%	2%
Illinois	4%	2%	2%
Maryland	3%	1%	2%
Massachusetts	2%	1%	1%
Ohio	3%	2%	1%
Virginia	3%	2%	1%
Florida	8%	8%	0%
Tennessee	3%	3%	0%
Wisconsin	1%	1%	0%
Oregon	1%	1%	0%
Minnesota	1%	1%	0%
Alabama	1%	1%	0%
New Jersey	2%	3%	-1%
Washington	1%	2%	-1%
Colorado	1%	2%	-1%
Georgia	3%	4%	-1%
Indiana	3%	4%	-1%
New York	6%	7%	-1%
Arizona	1%	3%	-2%
North Carolina	2%	4%	-2%
Missouri	2%	4%	-2%
South Carolina	0%	2%	-2%
Michigan	3%	5%	-2%

Spanish-speaking customers over-index significantly — consistent with the Hispanic demographic skew. The customer base is heavily concentrated in the South

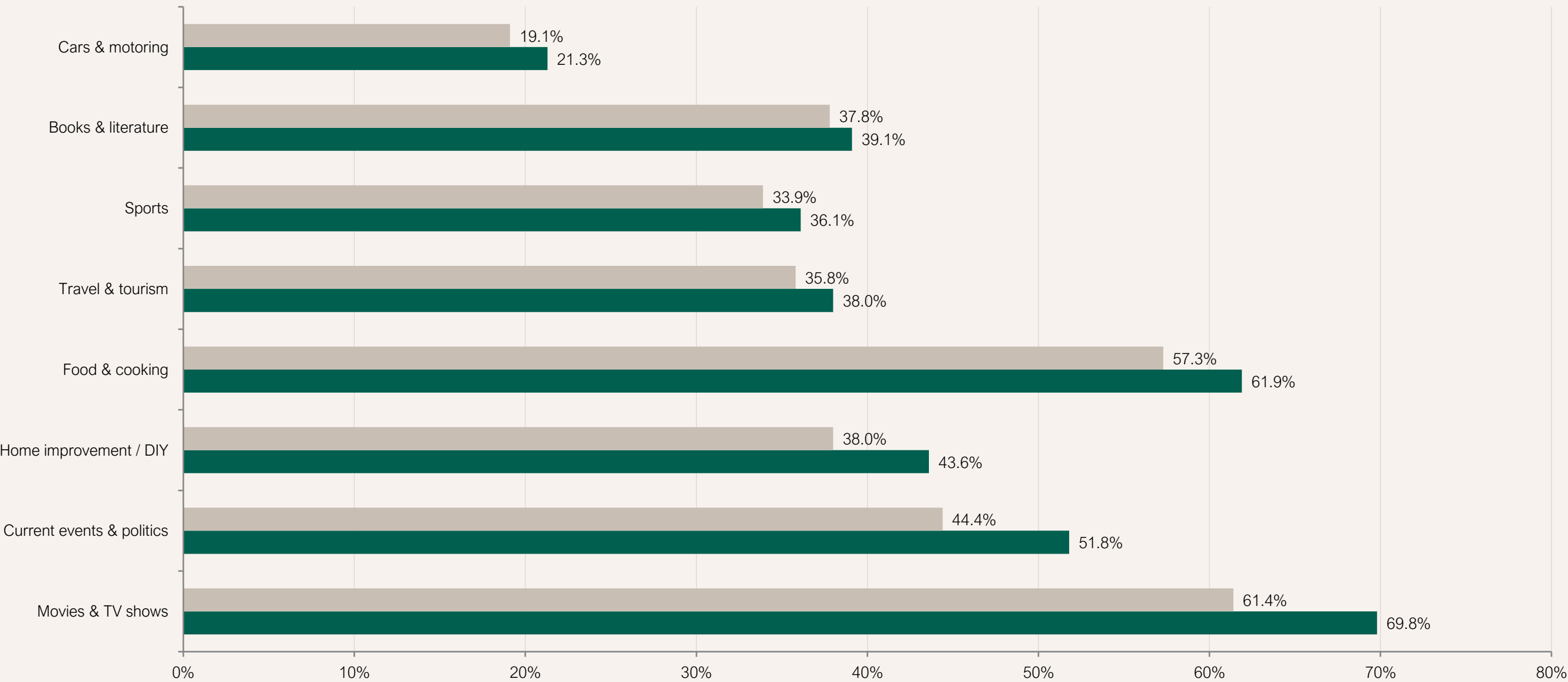


Lifestyle & Behavior

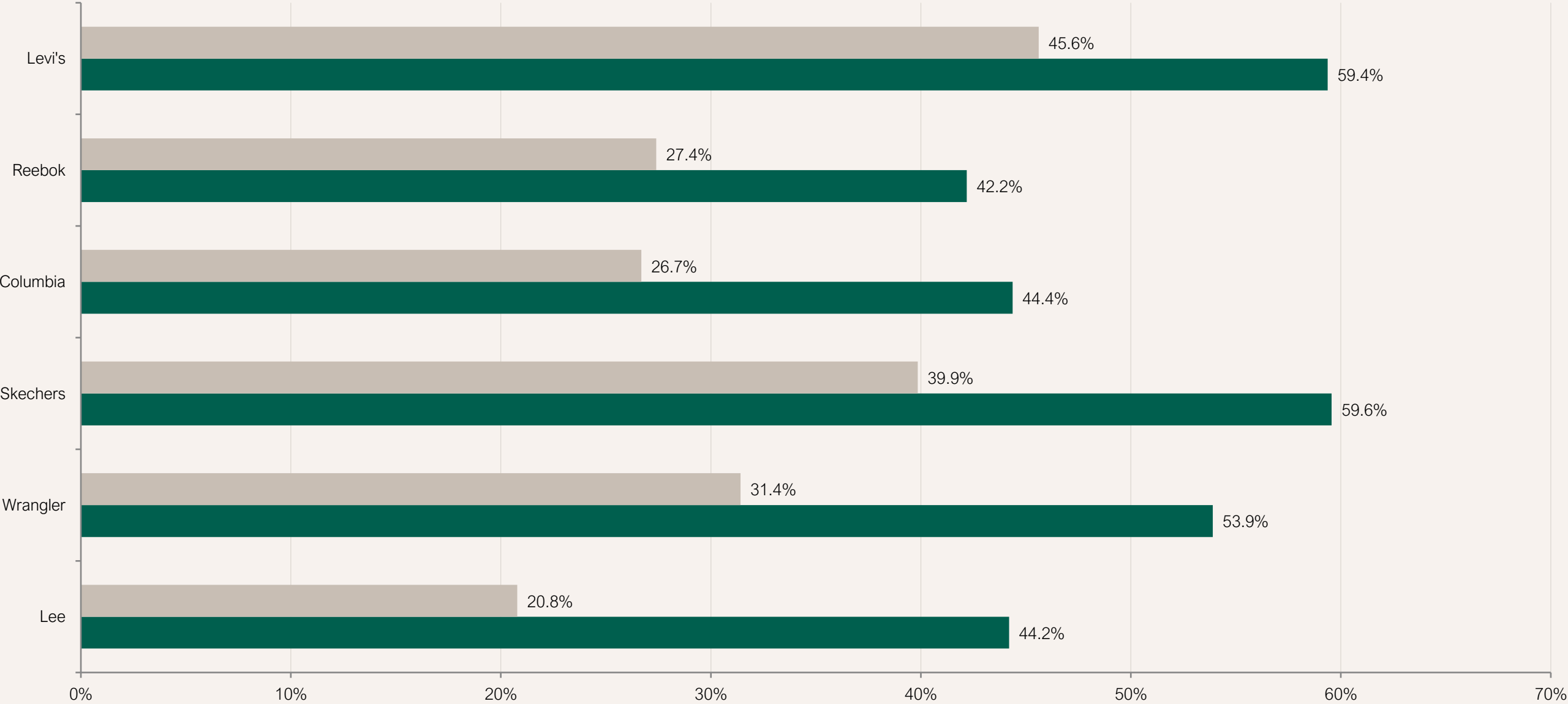
GLP-1 customers are significantly more likely to be married and to receive government benefits — consistent with their older, higher-income profile



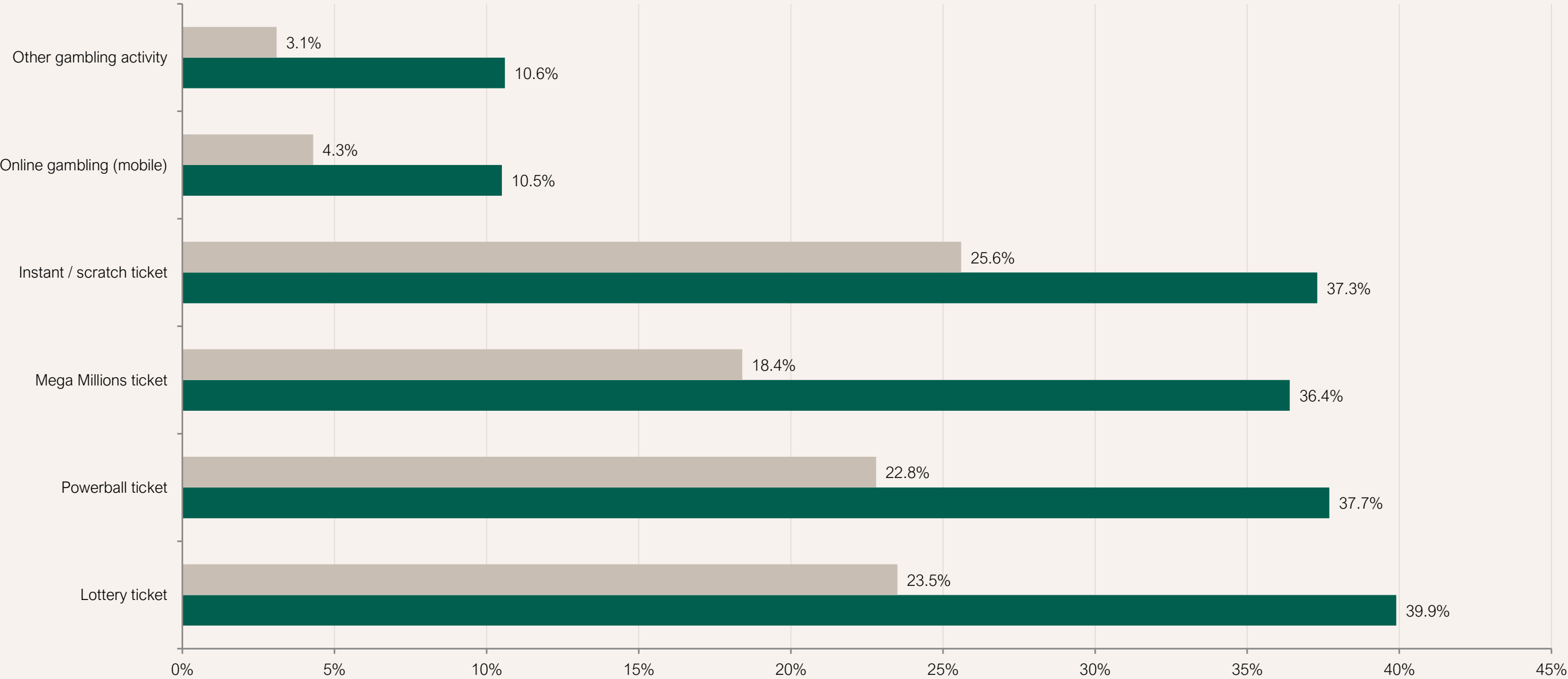
GLP-1 customers over-index on movies & TV (Index 114), current events & politics (Index 117), and home improvement — suggesting an engaged, media-savvy profile



Brand affinities in apparel show a distinct pivot toward utility, comfort-stretch, and reliable basics over high-fashion luxury



GLP-1 customers are significantly more active gamblers — lottery and Mega Millions at nearly 2× the national rate. Online gambling indexes at 243

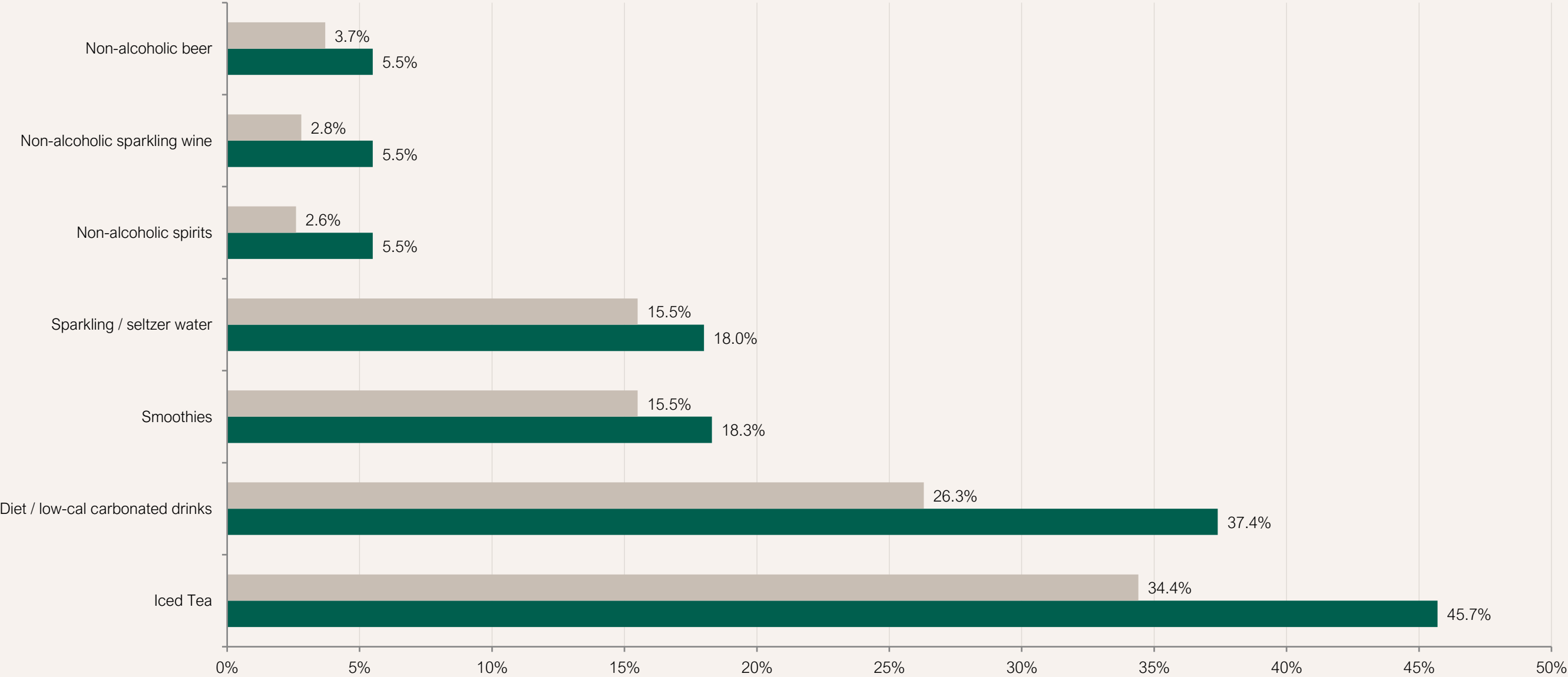


Food & Beverage

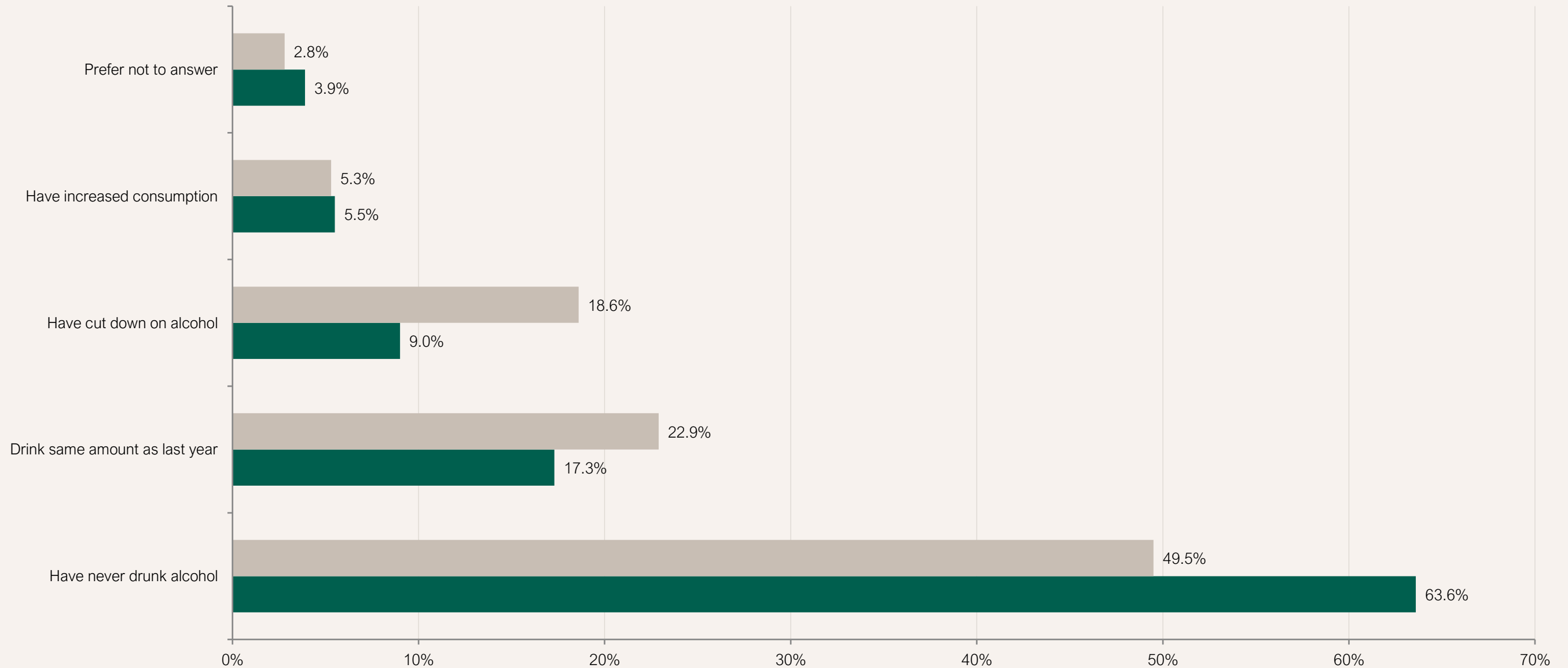
66% of GLP-1 customers do not drink alcohol (Index 131) — consistent with known GLP-1 appetite suppression effects. Non-alcoholic alternatives significantly over-index



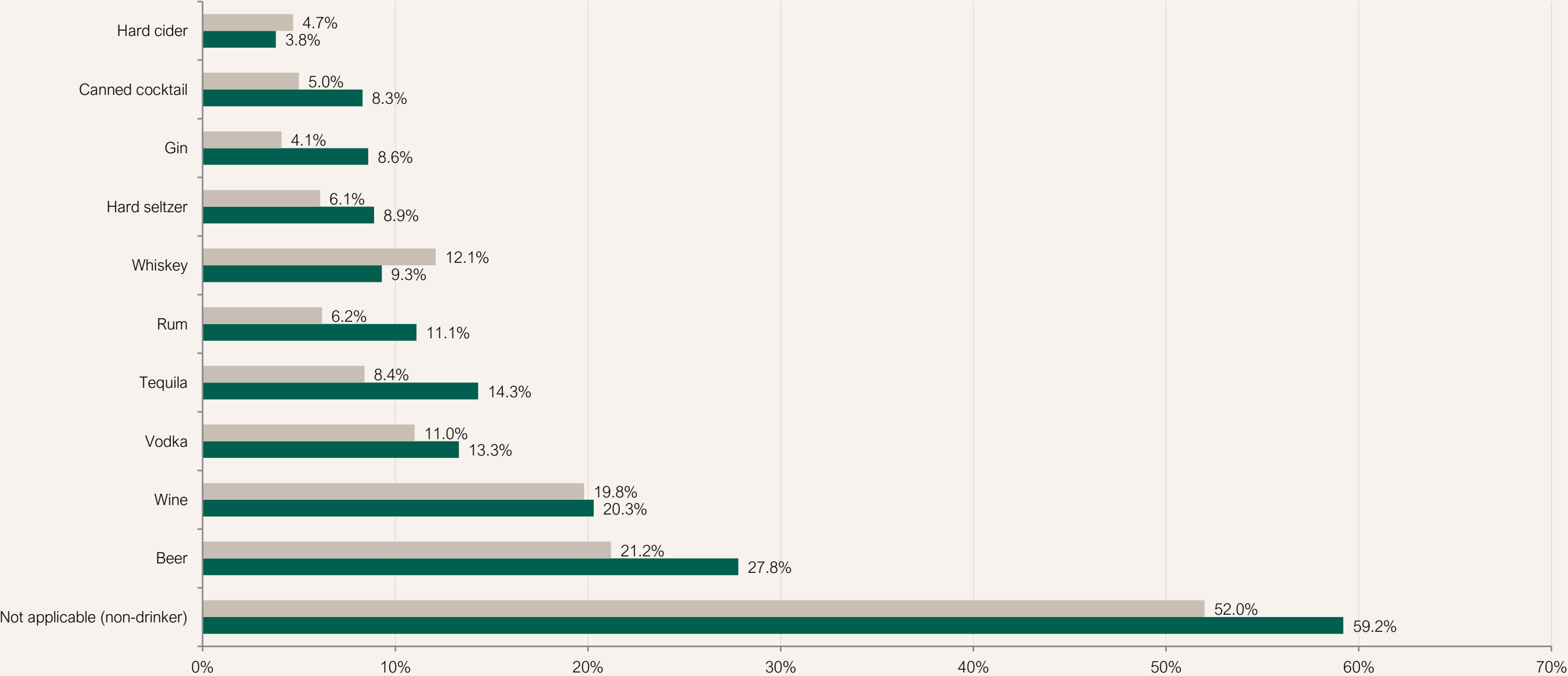
Diet / low-calorie soft drinks (Index 142) and iced tea (Index 133) are the standout non-alcoholic beverage preferences for GLP-1 customers in the past 30 days



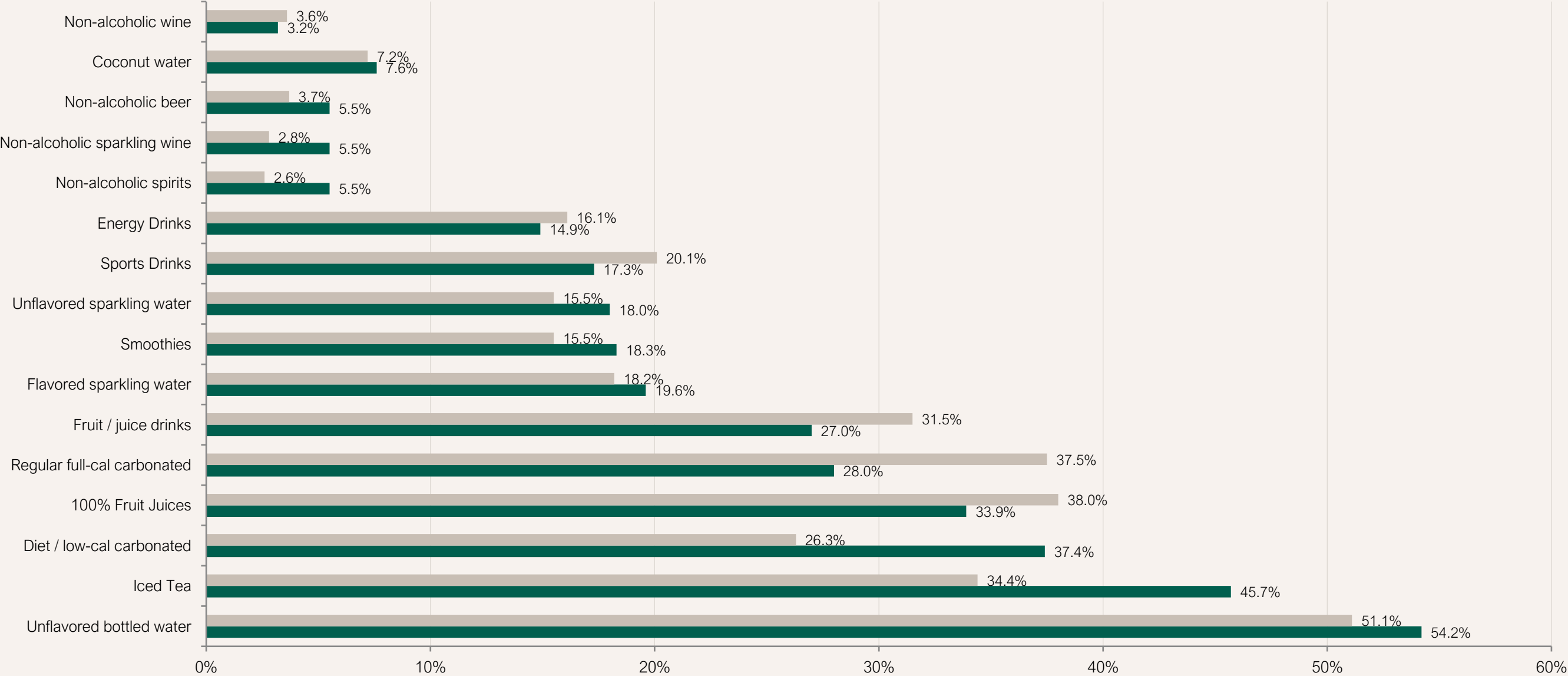
63.6% of GLP-1 customers have not consumed alcohol in the last 30 days (Index 128). Cutting down on alcohol under-indexes at 49 — suggesting customers were already abstinent rather than actively reducing



Among GLP-1 customers who do drink at home, tequila (Index 169), gin (Index 207), and rum (Index 180) over-index vs. national. Whiskey under-indexes (Index 77)

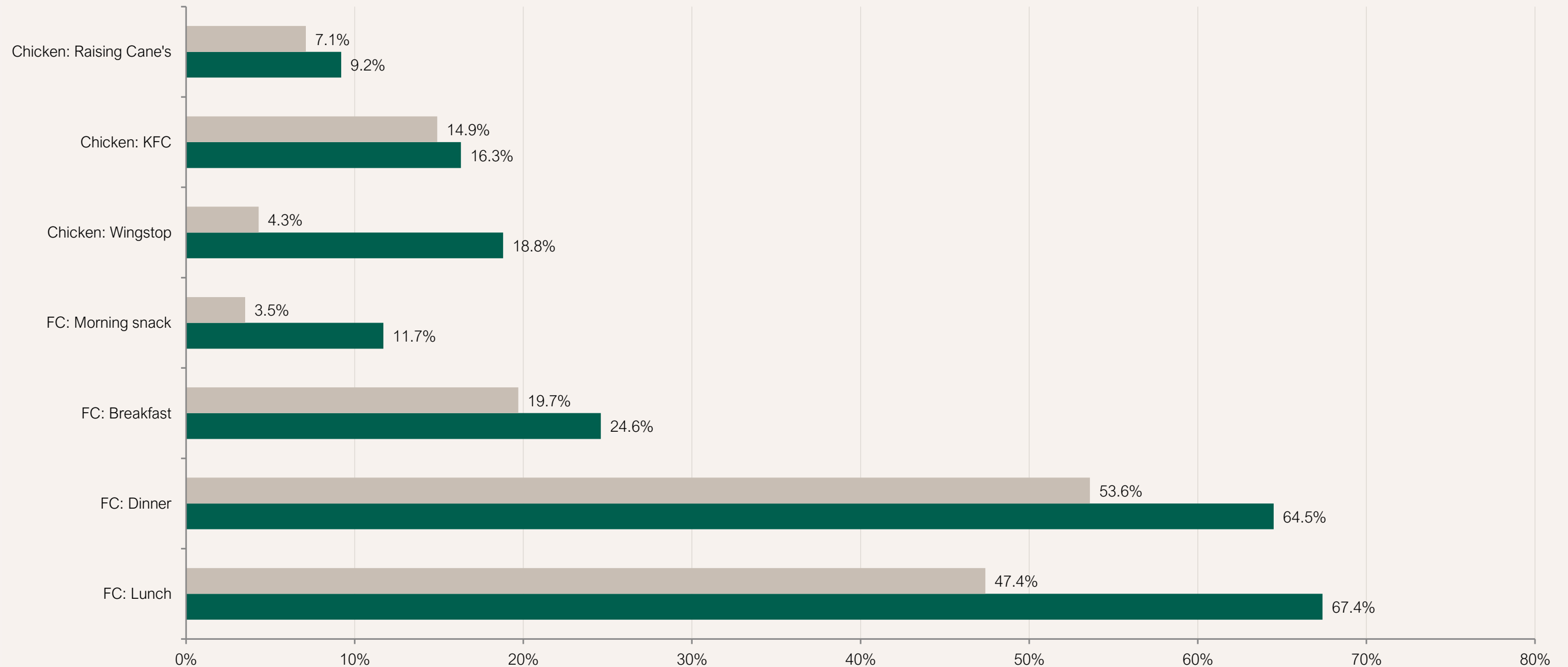


Diet / low-cal carbonated drinks (Index 142) and iced tea (Index 133) dominate GLP-1 non-alcoholic consumption. Regular full-calorie soft drinks sharply under-index (Index 74)

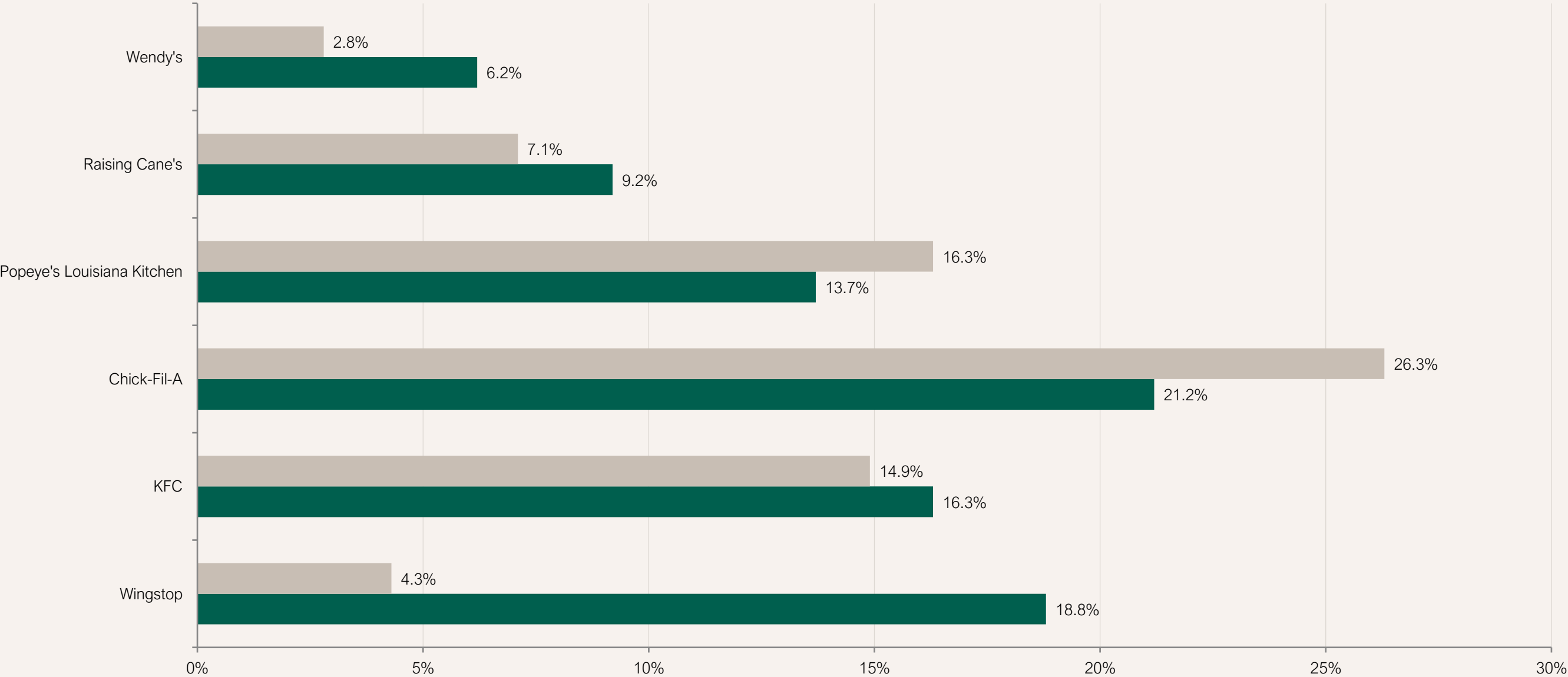


Restaurants

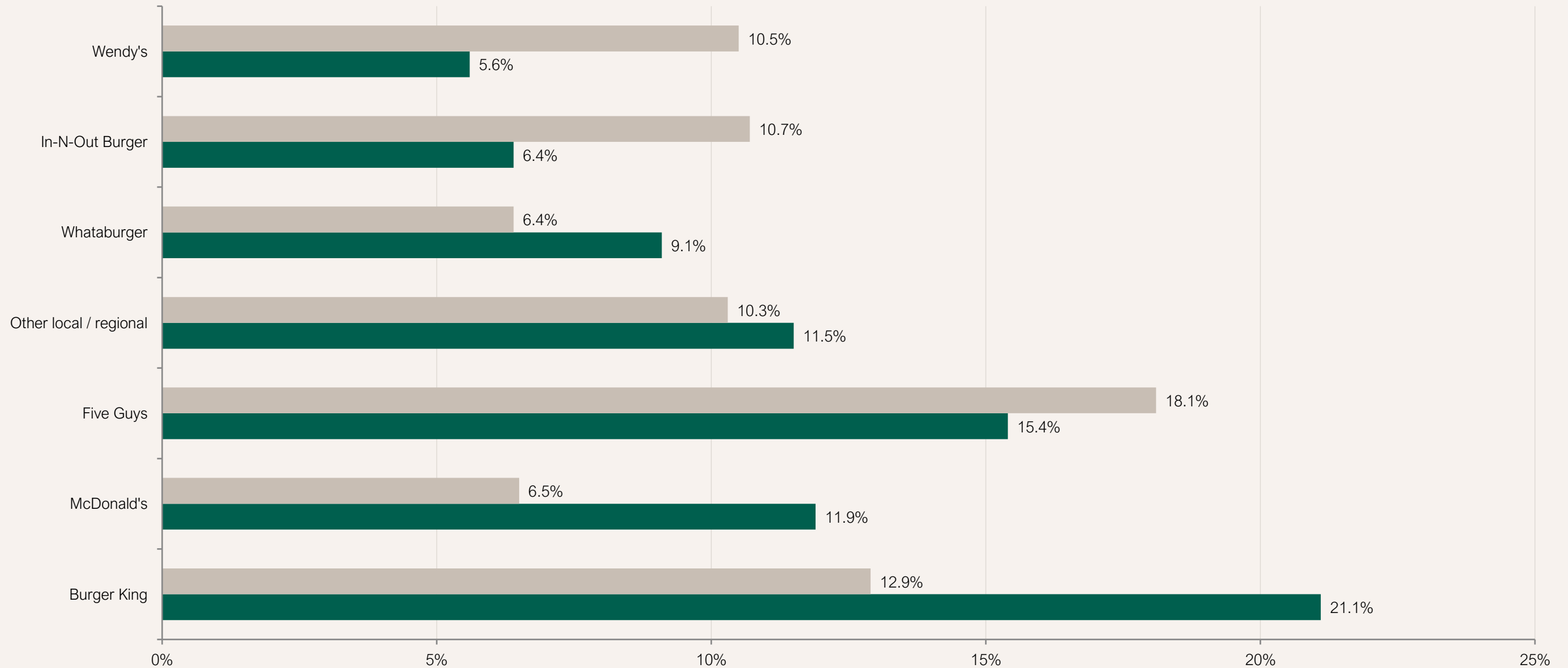
GLP-1 customers are heavy fast casual users, particularly for lunch (Index 142) and morning snacks (Index 332). Wingstop dominates chicken preference at 4.4× the national rate



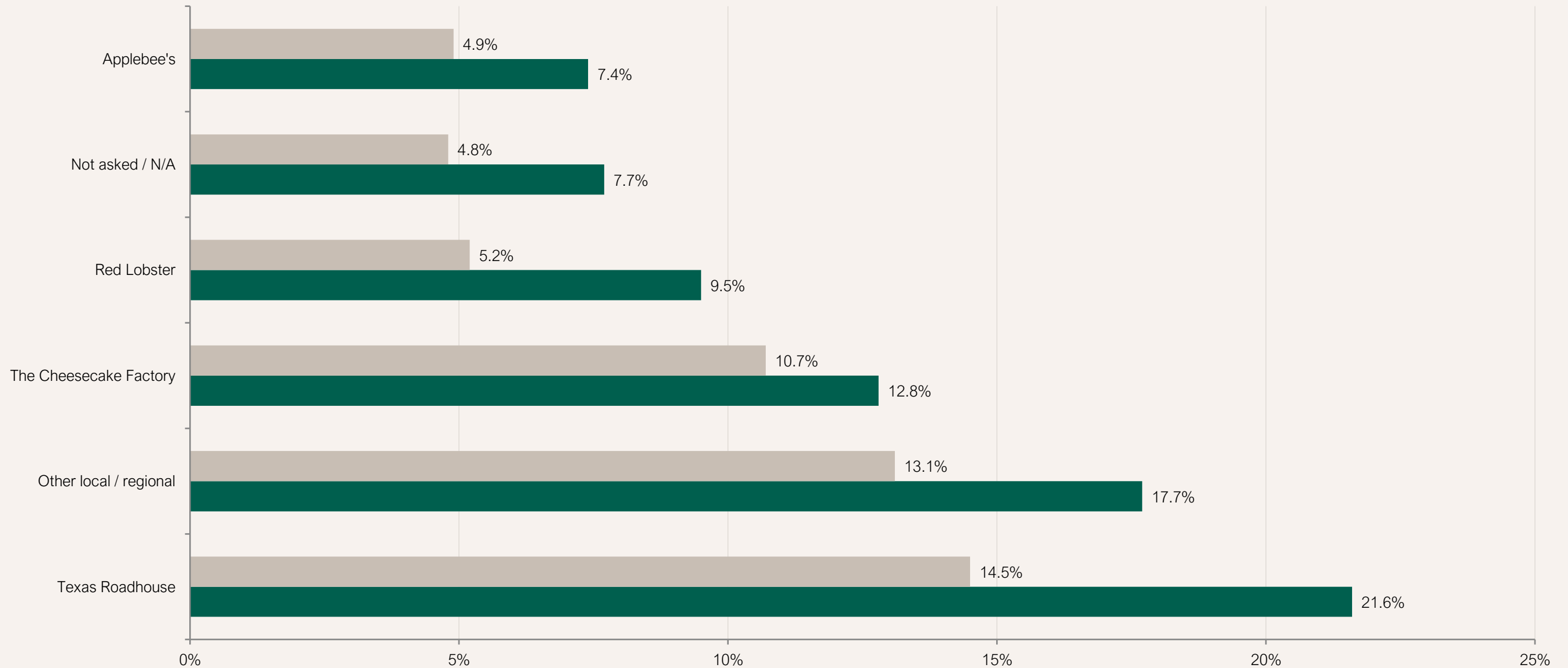
Wingstop dominates among GLP-1 customers for best chicken — indexing at 436, nearly 4.4× the national rate. Chick-Fil-A under-indexes (80) despite national popularity



Burger King (Index 164) and McDonald's (Index 184) also lead in the fast casual burger category. Wendy's and In-N-Out under-index vs. national averages



Texas Roadhouse leads casual dining for GLP-1 customers (Index 149). Red Lobster over-indexes at 180. The Cheesecake Factory and Applebee's both over-index modestly.



Key Takeaways

Older & Married

Skew 55+ and Baby Boomer/Gen X. Married majority. Millennials at Index 46 — the sharpest demographic gap in the data.

Hispanic & Southern

27.8% Hispanic vs. 16.3% nationally (Index 171). Concentrated in the South (Index 129); West significantly under-represents customers (Index 62).

Higher Income

Nearly 3× more likely to earn \$200K+. Far less likely to lack a HS diploma (Index 34). Government benefits received by 49% (Index 150).

Utilitarian

Consumer clothing preferences are shifting away from luxury fashion and toward practical, comfortable, and dependable everyday wear.

Inclined to Gamble

People taking GLP-1 medications gamble at nearly twice the national average, with online gambling particularly elevated.

Sober & Diet-Conscious

66% non-drinkers (Index 131). Non-alcoholic spirits at 2× nationally. Diet soda and iced tea are primary beverage choices.

Fast Casual Users

Heavy fast casual lunch users at Index 142, morning snack Index 332. Wingstop a clear favorite.

Media-Engaged

Movies/TV Index 114. Current events/politics Index 117. Home improvement Index 115. An engaged, informed consumer base.