Future Commerce

SIGNAL REPORT

Frictionless Wellness

GLP-3s and what comes after the age of autonomy

A SIGNAL REPORT BY FUTURE COMMERCE

DATA PROVIDED BY Merciv

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Healthcare's power dynamic shifted to manufacturers

The wellness market has historically been controlled by gatekeepers. Healthcare professionals and pharmacists have kept cutting-edge treatments under lock and key, while nutritionists and trainers have gated their expertise behind monthly paywalls.

As a result, consumers' trust in healthcare institutions has reached record lows. While the public still trusts and consults individual doctors (84%), they're seeking alternative vehicles for accessing medical tests, treatments, and healthcare support.[52]

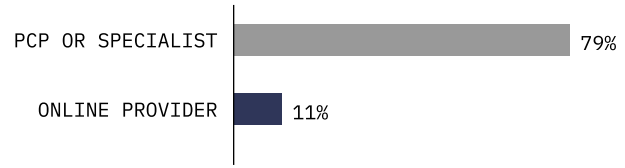
28%

Of US adults express confidence in the medical system, tying its lowest reading on record.[52]

The rise of Ozempic and other GLP-1s is a powerful example of how the sovereign consumer can transform markets. In this case, we're seeing a shift in who holds the power. Up to 79% of GLP-1 users still get the drug from a primary care doctor or specialist, while 11% get it from an online provider. Consumers have gained new entry points, price transparency, and a shift in leverage. They're relying less on retail pharmacies and pharmacy benefit managers and more on manufacturers, telehealth platforms, and a federal pricing platform.[23]

WHERE THE PRESCRIPTION COMES FROM

Four in five users still route through a doctor; the online channel is the one that is new



SOURCE: KFF, Poll: 1 in 8 Adults Taking a GLP-1 Drug, 2026. See source 23.

Merciv

RESEARCH CONDUCTED WITH MERCIV

Using the Merciv platform, we have instant access to a trove of research and information to help us unpack what's really happening in the wellness market so we can help you see around the next corner.

23 KFF, Poll: 1 in 8 Adults Taking a GLP-1 Drug, 2026.

52 Gallup, Confidence in Institutions, July 2026.

Secondary outcomes have eclipsed medical intent

Cultural strategist Matt Klein once compared the rise of GLP-1 agonists to the likes of Viagra. His core thesis was that the drugs’ secondary outcomes (weight loss) have culturally eclipsed original medical intents (diabetes care).

In his 2026 Meta Trends Report, Klein also grouped GLP-1 culture alongside AI automation and longevity anxieties as a symptom of a society rushing to optimize, hack, and fast-track human capabilities. Theoretically, optimization equates to a frictionless existence. We use apps to optimize our days; they help us plan our meetings better, manage our tasks, and take smarter notes during meetings so that we can feel less stressed and more productive. While initially marketed as a tool to support individuals with diabetes and obesity, GLP-1s have been repositioned to support a broader net of pain points, from PCOS to sleep apnea, “food noise,” and other addictive behaviors.[56]

The marketing machine, fueled by wellness creators and biohackers, has hijacked the messaging. They have refined GLP-1 positioning to be far more digestible and attainable. With this shifting perception comes commercialization. Pharmaceutical companies have broadened their manufacturing scope to keep pace with demand, offering both shots and pills to appeal to more consumers. And greater availability equates to more mass marketing. Messaging tied to GLP-1s’ initial intention—diabetes and obesity care—is being deprioritized in exchange for broader wellness messaging tied to personal autonomy and optimization.

HYPOTHESIS

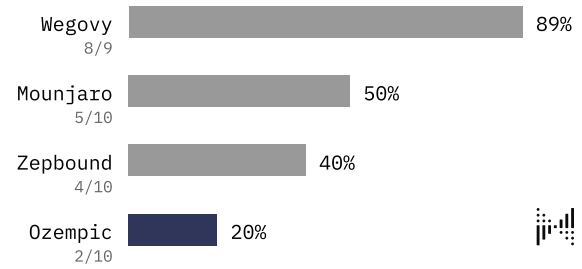
Going into this project, we had an initial hypothesis: that GLP-1s are so effective at eliminating friction that consumers’ perceptions of the drug have dramatically shifted.

THE REPOSITIONING

GLP-1s are now tools that consumers choose for their own health and aesthetic needs. They are also status symbols that represent financial access and one’s ability to keep pace with new beauty standards. This tonal shift has sparked a relentless cycle with deep cultural and commercial implications.

INSTAGRAM / TOP-CONTENT FRESHNESS

Only 1 in 5 of Ozempic’s top reels is current; its reach is legacy



SOURCE: MERCIV. TOP INSTAGRAM BRAND REELS, AUG 2026. DIRECTIONAL, NON-PROBABILITY SAMPLE.

56 Matt Klein, Meta Trends 2026, kleinkleinklein.

Three reasons why GLP-1s matter now

We have found that GLP-1s haven't completely removed the friction in consumers' pursuit of optimized health and wellness. Instead, they have moved the friction off the scale and into access and cost, into muscle and face, into identity and moral judgment, and into an entire downstream economy that exists to metabolize the shift.

01 / CATEGORY

The category has evolved past its first brand.

"The Ozempic Effect" is the first chapter of a much larger wellness story. The discourse now includes peptides and multi-agonists, including the commerce-coined, scientifically inaccurate label of "GLP-3s," which has 74,000 monthly US searches and a search results page dominated by grey-market peptide vendors.[2]

02 / MORALITY

The moral implications of 'frictionless wellness.'

GLP-1 has expanded across different consumer demographics, with Gen Zers and Millennials now using it to support weight management. Influencer promotion of these drugs and other peptides has shifted the tone of social discourse, but studies indicate that there is still a staggering moral judgment tied to their use.[40]

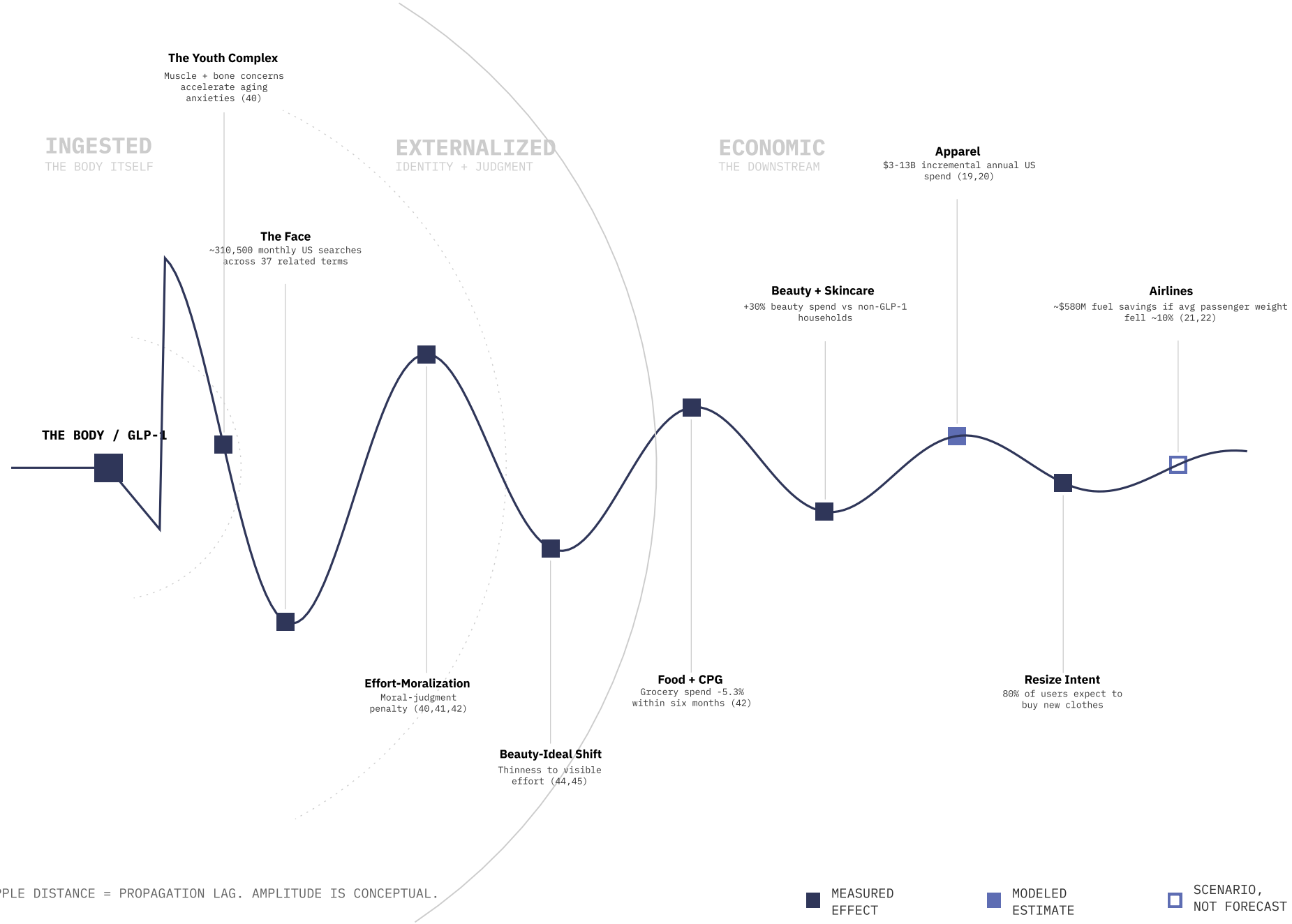
03 / COMMERCE

Food is the visible proxy.

The Protein Economy is the clearest example of how wellness trends domino into everyday purchases. Grocery lists and menus are reorganizing around nutrient density, but secondary, even tertiary, categories are also feeling the aftershocks.[12]

2 Merciv platform. Google Ads keyword volume and trend data.
12, 40 BBC News, 2026; Scientific Reports (Nature), 2026.

Chart: The ripple effects of GLP-1s



Branded searches have become diffuse

Approximately 10 million people were on GLP-1s in 2025, and that number is expected to reach 20 million in 2026 and 30 million by 2030.

But this is not a case of genericism, where the core brand gains the most market share because it is synonymous with the category. Mainstream demand for GLP-1s has led to greater market diversification and competition—and the category is evolving beyond the brand that started the movement.

70%

Decline in monthly US search volume for "Ozempic" from its August–September 2024 high of 1.83 million.[2]

Ozempic's sales rose 6% in 2025, but fell 6% in the first half of 2026. And search behaviors correlate with the drop. US search interest in "Ozempic" has fallen roughly two-thirds from its May 2024 peak on a normalized index, with Google Ads monthly volume down about 70% from its August–September 2024 high of 1.83 million to 550,000 as of June 2026. Zepbound (823,000/month) and Mounjaro (673,000/month) are essentially unchanged from two years ago, both off their early-2025 and early-2026 peaks. What is actually gaining traction are more generic terms. "GLP-1" rose from 301,000 to a peak of 1 million monthly searches, and "peptides" increased from 110,000 to 1.22 million.[1, 2]

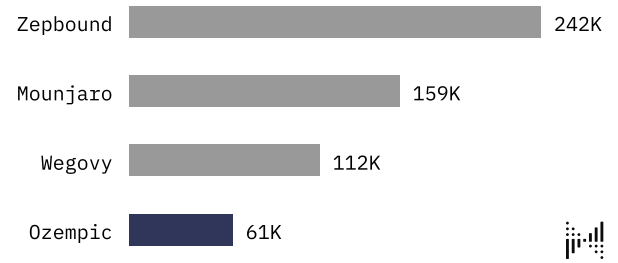
WHY THE SHIFT IN THE LANGUAGE?

This could be attributed to independent websites and creators using broader, unbranded terms to promote new grey-market brands and more wellness-oriented benefits. Consumers are also using more general terms to seek out new options based on their individual needs and goals.

The following page shows time-series searches by brand terms.

REDDIT / COMMUNITY VIBRANCY

The drug that named the category now has the smallest community, a quarter of Zepbound's



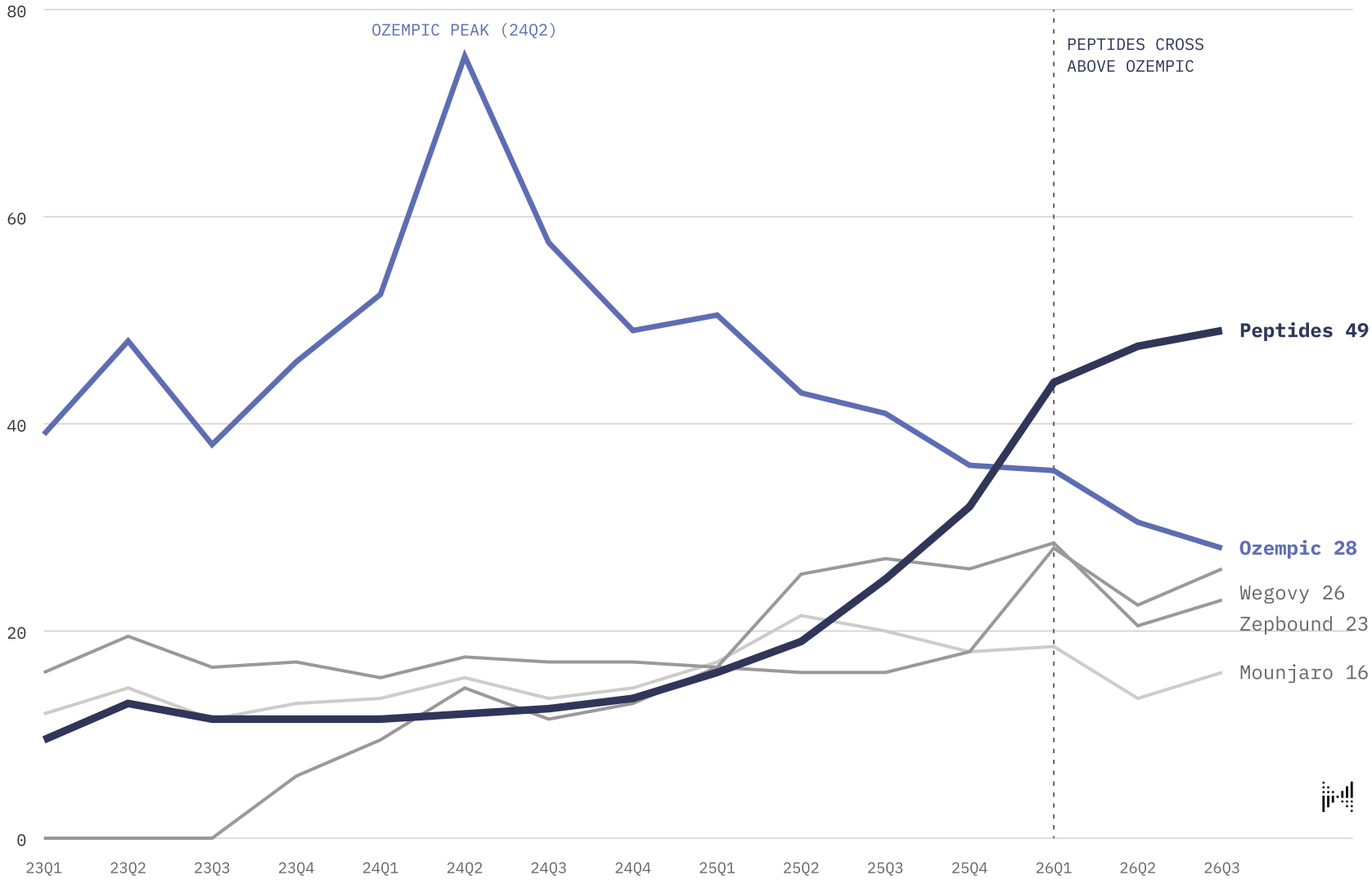
SOURCE: MERCIV. REDDIT ACTIVE-MEMBER COUNTS, AUG 2026. POINT IN TIME.

1 Merciv platform pull. Search-interest index trends, 5-year: ozempic / wegovy / zepbound / mounjaro / retatrutide.

2 Merciv platform pull. Google Ads keyword volume and trend data: glp-1, zepbound, ozempic, peptides, compounded semaglutide.

Chart: Searches for peptides crossed above Ozempic in Q1 2026

SEARCH / THE DE-BRANDING CURVE • US SEARCH-INTEREST INDEX, QUARTERLY



SOURCE: MERCIV PLATFORM. US SEARCH-INTEREST INDEX (0-100), 5-YEAR, QUARTERLY. SEE SOURCE 1.

Peak adoption is among Gen X, but Gen Z is next in line

The current GLP-1 adoption curve splits by age. Peak adoption is among 50-to-64-year-olds (22%), with the longtail trickling down to 30-to-49-year-olds (11%), 65+-year-olds (9%), and 18–29-year-olds (4%).[15, 23]

However, Gen Z and Millennials are largely influencing where the category goes next. When we narrowed usage down to weight-loss as a goal, we saw adoption skew younger, confirming the product category's cultural influence. Up to 71% of weight-loss GLP-1 users in 2023 were Gen X or Millennials versus 24% Boomers, close to inverted from the diabetes-management population (60% Boomers). On stated intent, Gen Z also led every generation in 2025 resolution plans to try a GLP-1 (37% vs. 26% overall).[46, 47]

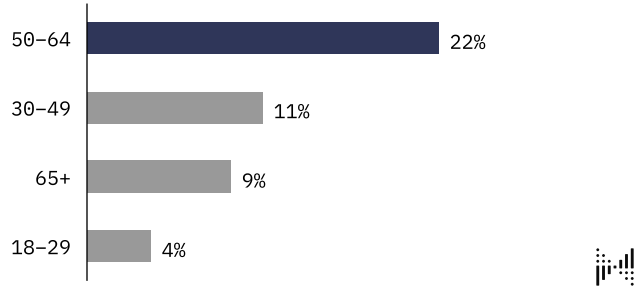
5x

More likely: Gen Z over Boomers, citing weight management rather than diabetes as the reason for GLP-1 use.[46]

Younger consumers, especially wellness "Optimizers," are also leaning into peptides, NAD+, and "GLP-3s." About 26% of Gen Z and Millennials call peptides "exciting and promising," more than double the 11% of Gen X and older. Though it's important to note that this is largely tied to awareness, not necessarily willingness or enthusiasm.[48]

GLP-1 USE BY AGE

Adoption peaks in midlife; 18-to-29s are the smallest cohort using and the loudest cohort intending



SOURCE: Gallup and KFF adoption polling, 2026. See sources 15, 23.

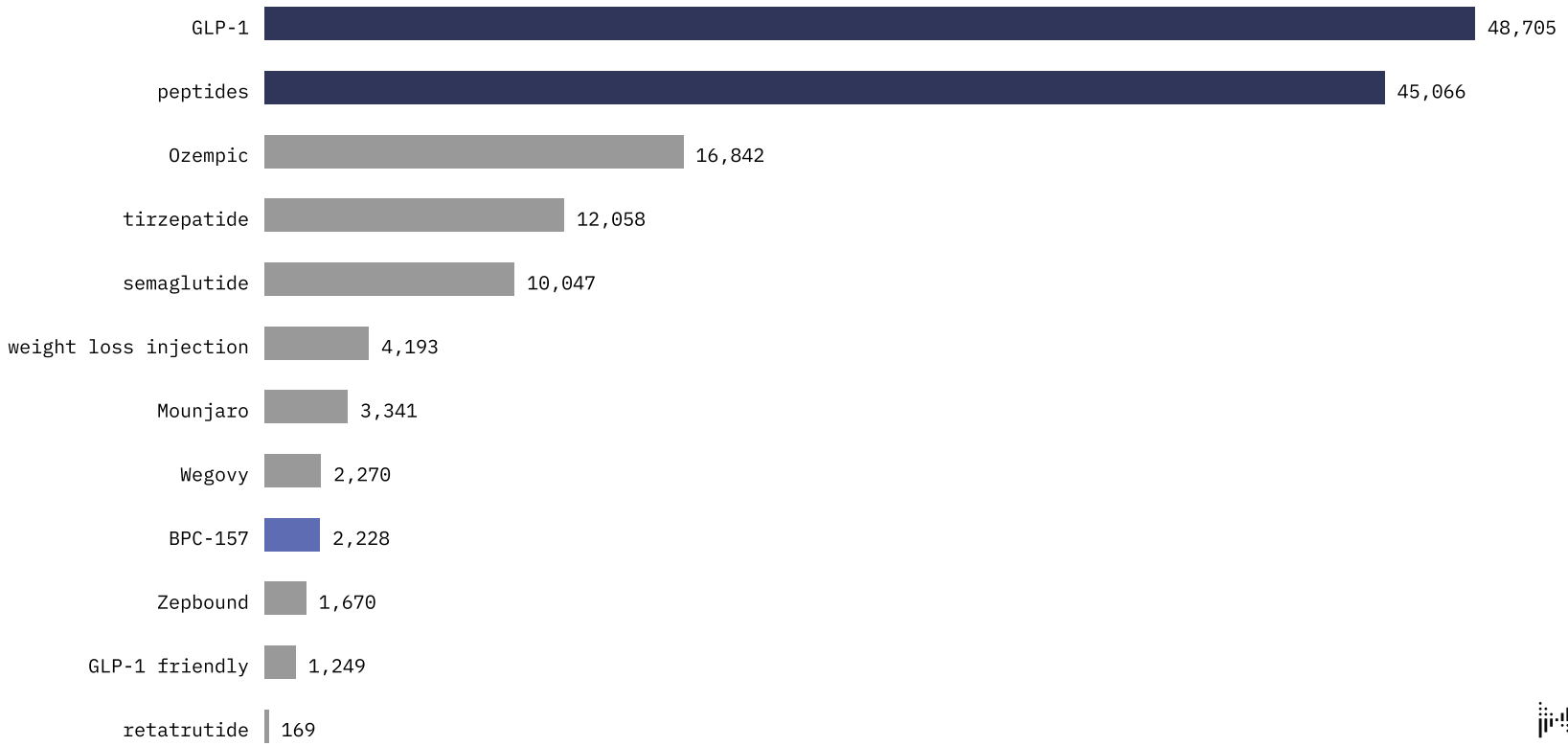
RISK

The FDA places many of these compounds in Category 2, citing immunogenicity and impurity risks, with documented adverse events for CJC-1295 and BPC-157 and an April 2026 warning letter and import alert against a bulk producer over sterility violations. A May 2026 survey (n=2,491) found half of people taking research-grade peptides believe they are FDA-approved.

15, 23 Gallup, GLP-1 Usage Reaches New High, 2026; KFF, 2026.
46, 47 Numerator, 2026; Tebra / The Intake, 2026.
48 New Consumer survey via Athletech News, 2026.

Chart: Brand-led advertising on Meta trails by 3X vs. generic terms

META / BRAND-POSTING FOOTPRINT



SOURCE: MERCIV. ACTIVE US META AD CREATIVES BY TERM, JUL 2026.

More potent and convenient molecules are coming

We're beginning to see a shift in the user base of GLP-1s, peptides, and NAD+. These wellness "Optimizers" have a specific worldview and, in turn, have very specific expectations for how they design and curate their lives.

We will see the market continue to evolve with consumer language, which, as we've seen, can nullify the most powerful brand names. Search interest in "peptides" has climbed from 110,000 monthly searches in 2021 to 1.22M as of July 2026. Google Ads volume has also roughly quadrupled, from approximately 301K per month in mid-2025 to nearly 1.22 million per month as of Spring 2026.[2, 4]

THE SELF-SOURCED PEPTIDE ECONOMY

Gen Z men are especially the fastest-growing adopters of unregulated peptides, such as BPC-157, TB-500, and CJC-1295, to support their performance and aesthetic goals. They primarily source these peptides through grey-market and social-media sellers rather than actual clinicians, bringing "autonomous consumerism" to a completely new level. A self-sourced, self-dosed peptide economy is forming largely outside clinical supervision, built on the same grey-market and creator-driven distribution that normalized compounded semaglutide.[51]

NEXT STEPS / R&D

- Young consumers are nearly twice as likely to stack research-grade peptides alongside GLP-1s, NAD+, creatine, and wearables. Consider how new form factors are impacting wellness routines and the role that your product plays in them.
- Audit your current product roadmap to see how your long-term vision aligns with where the market is going. There could be opportunities for revision or expansion.

NEXT STEPS / MARKETING

- Plan for a future where "Ozempic" isn't in the cultural vernacular. Prioritize category fluency (e.g., "GLP-1") and use broader language that aligns with consumer goals and outcomes, not specific treatments.
- Conduct quarterly SEO and AEO audits to understand how different brands and phrases are tracking.
- Decide whether to engage the "peptide" and "GLP-3" vocabulary based on the sentiment and adoption of your target consumer base.

2, 4 Data via Merciv platform. Google Ads keyword volume; search-interest index trends.
51 NewsNation, Gen Z Men Turn to Unregulated Peptides, 2026.

Perceived risk is falling, but the stigma is still very real

Some believe the word “frictionless” connotes positive outcomes because you’re removing barriers that are slowing a user’s journey to their ultimate goal. However, we believe some friction can be good.

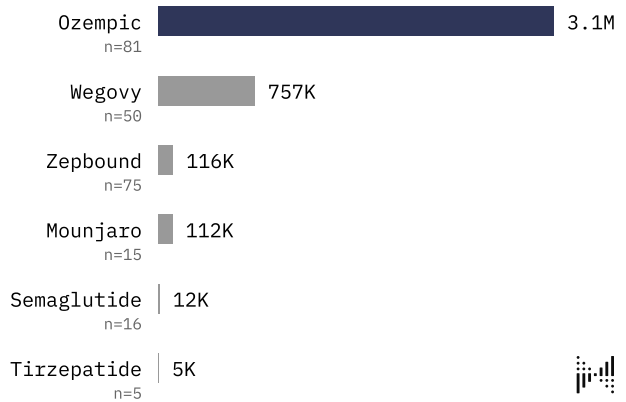
In the simplest terms, if it only takes you one click to buy a $2,000 handbag, but you need that money to pay your rent, removing friction creates greater emotional and moral tension. You may have a beautiful new purse, but you will quickly feel buyer’s remorse because you can’t pay your bills.

This GLP-1 research further examines our pushback against “frictionless experiences,” while also testing the central thesis in current GLP-1 discourse: that people who use these drugs are taking the easy way out, but because of mass marketing and greater cultural acceptance, they are judged less and, in many cases, even lauded.

Influencer-driven optics. A cohort of creators, among them Ashlie Molstad and Samantha Milton, have paid affiliate relationships with GLP-1 telehealth or peptide vendors, and have helped push the GLP-1 discourse beyond weight loss toward PCOS, "food noise," and hormone management. This new narrative includes new vocabulary, which has added scientific legitimacy to a drug that was getting cultural pushback.[50]

TIKTOK / US ENGAGEMENT BY BRAND

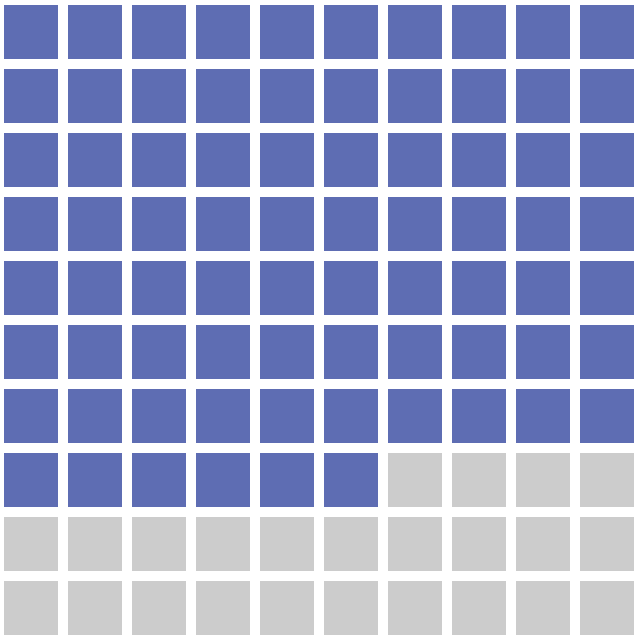
Ozempic still owns the conversation: 3.1M US engagements, 4x every rival combined



SOURCE: MERCIV. TIKTOK HARVEST, JAN 1 TO AUG 11 2026.
CAPTION-VERIFIED MENTIONS: FLOORS, NOT TOTALS.
MEDIAN PER VIDEO RUNS OPPOSITE: MOUNJARO 951 VS ZEPBOUND 86.

41, 42, 50 APA Monitor, 2025; NLM, PMC12374426; Glossy, 2026.

Data: Legitimacy is rising in the face of social stigmas



Each unit = 1% of GLP-1 users.
SOURCE: APA Monitor, 2025; NLM review, 2026. See sources 41, 42.

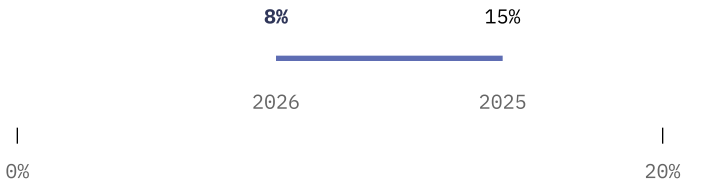
76%

Of GLP-1 users say stigma still surrounds the drugs.[41]

Institutional legitimacy is rising sharply, with perceived risk falling from 15% to 8% on the “extremely risky” designation. Yet interpersonal stigma is essentially unchanged: two-thirds conceal treatment from some or all friends and family, rising to three in four among Gen Z.

PERCEIVED RISK, “EXTREMELY RISKY”

Risk perception nearly halved in a year; the stigma it was supposed to explain did not move



SOURCE: APA Monitor and NLM review, 2025–2026. Seven-point fall on the “extremely risky” designation. See sources 41, 42.

41, 42 APA Monitor on Psychology, 2025; National Library of Medicine, PMC12374426.

The penalty lands on moral judgment, not on competence

Social media chatter. Merciv analyzed social media sentiment across Reddit and TikTok to understand the GLP-1 discourse outside of the influencer bubble. What we found was that everyday user conversations centered on real outcomes and practical advice.

The r/Ozempic subreddit focused on cost, access, side effects (menstrual, vision, emotional flattening), and stigma. An analysis of 2,719 peptide posts on Reddit also found that GLP-1s accounted for approximately 51% of peptide conversations, with discussions running far ahead of regulatory approval.[35]

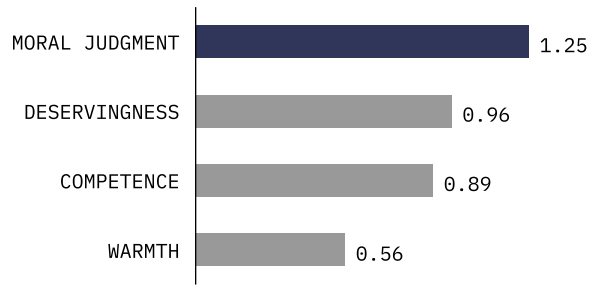
On TikTok, “peptides wellness” garnered a collective 3.73 million views, with PCOS and hormonal health as a recurring narrative thread. Other posts showed a clear split in social sentiment. While some replayed mainstream news coverage from shows like 60 Minutes and Healthline-style warnings, others promoted must-have products, including those without FDA approval and sold through the grey market.

Moral stigma and judgment. Institutional legitimacy is rising sharply, with perceived risk falling from 15% to 8% (e.g., “extremely risky” designation). Yet interpersonal stigma is essentially unchanged. 76% of users say stigma still surrounds the drugs; two-thirds conceal treatment from some or all friends and family, rising to three in four among Gen Z.

Body-image professionals have also openly warned about how the mass adoption of GLP-1s is reversing work done by the body acceptance movement. The adoption curve started with celebrities. Red-carpet images of more angular and muscular physiques have gone viral in the name of “chic-ness.” Ultra-thin aesthetics have since bled into the creator economy, making these new symbols of elitism and high net worth aspirational. [57]

EFFORT-MORALIZATION

Moral judgment carries the largest measured penalty; warmth carries the smallest



SOURCE: Scientific Reports (Nature), 2026. Cohen’s d, vignette experiments, N=1,205. See source 40.

CAVEAT

The authors note that side-by-side hypothetical judgment likely amplifies magnitude. The measure captures how much penalty exists, not who applies it.

35 Merciv platform pull. Social and community listening, Reddit and TikTok.

40 Scientific Reports (Nature), Anti-obesity medication use sparks effort-based sanctions, 2026.

57 Everybody Consulting, GLP-1s and diet culture.

“GLP-1s are a shortcut” is a Creator-led narrative

VOICE DIVERGENCE / CREATORS VS EVERYDAY USERS

Creators / Influencers

TIKTOK + INSTAGRAM / FRAMING AND MONETIZATION

> *“GLP-1s are saving countless lives by reversing the effects of obesity. Meanwhile thin people are 'concerned'...*
> PRO-DRUG DEFIANCE. 102K VIEWS, 1,977 LIKES

> *“PCOS divas, this one's for you. SPONSORED: #TRYEDEN #EDENPARTNER*
> PCOS REFRAME + TELEHEALTH AFFILIATE ECONOMY

> *“Let's stop normalizing poking ourselves when we aren't...*
> SKEPTIC 'EARN IT' COUNTER-LANE. 74K VIEWS

47.8K
AVG VIEWS / TOP POST

4.2%
AVG ENGAGEMENT

3
DISTINCT FRAMINGS

Everyday Users

REDDIT / CANDID LIVED EXPERIENCE

> *“1 year on Ozempic. 300 lbs to 160. Back in a size small.*
> R/OZEMPIC TOP POSTS. 0.96 TO 0.99 UPVOTE RATIOS

> *“If this is Ozempic face, I'll take it.*
> RECLAIMING A CLINICAL SLUR AS A STATUS MARKER

> *“PLEASE STOP USING UNITS TO MEASURE YOUR DOSE. My stash of Reta 30mg.*
> R/PEPTIDES. DIY + HARM-REDUCTION + GREY-MARKET

~1,050
AVG SCORE / TOP POST

109
AVG COMMENTS (R/PEPTIDES)

~51%
OF PEPTIDE TALK IS GLP-1

SOURCE: MERCIV. TIKTOK, INSTAGRAM, REDDIT CORPUS. SEE SOURCES 1, 2.

The “silent users” are the untapped audience

Focused conversations among users are leaning into community-building and advice-sharing. However, there is a clear tension when GLP-1s are discussed in mass media and even research.

Brands must understand these nuances while also acknowledging that there are many “silent users” who are not participating in social media discourse or, frankly, say one thing but do another.

Some GLP-1 users may not ask questions or share their feedback on social because they don’t want to be on the receiving end of judgment. They may say they haven’t used these drugs, but actually are. This is an untapped audience that brands have the opportunity to speak to and serve.

NEXT STEPS / R&D

- Consider how you can bundle products and services to make this audience’s wellness journey easier. Whole Health Rx™ by The Vitamin Shoppe, which combines supplements and telehealth services, is a reference model.
- Map the purchase journey for a GLP-1-adjacent product and flag every point where a customer’s use could become visible to others, whether that be through packaging, the checkout experience, or delivery.

NEXT STEPS / MARKETING

- Marketing must navigate a landscape where both using and not using GLP-1s carry moral charge. The safest posture is to lean into bodily autonomy and even self-care.
- Frame benefits and outcomes around feeling: mobility, confidence, mental health, and emotional well-being.
- Run qualitative survey panels to dig deeper into the real experiences of GLP-1, peptide, and semaglutide users.
- Use these insights as inspiration for marketing campaigns and content creation.

35, 41 Merciv social and community listening; APA Monitor on Psychology, 2025.

Grocery spending shifts toward nutrient density

GLP-1s and peptides have made consumers' speed to fitness faster, but they have not eliminated friction. The effort has been relocated, and it is most clear in commerce. The friction is on shelves, in ingredient labels, and on clothing racks.

Wall Street's "GLP-1 will kill the grocery aisle" narrative has proven overstated, but spending patterns have evolved to address new nutritional needs. Households with a GLP-1 user cut grocery spend by 5.3% within six months, and 8.2% among households earning over $125,000. Spending on savory snacks was down 10.1% while limited-service restaurant spend was down 8.0%. But the modeled drag on US food volume is roughly −0.2% per year through 2031. Circana also found that household food spend among GLP-1 users reverted toward the baseline by the end of year one.[27, 28, 29]

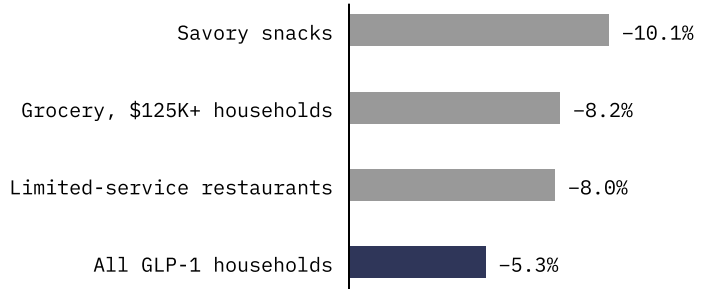
+57%

TikTok Shop revenue on "protein," with views up 150%. Protein-rich products grew +4.8% in volume year-over-year.[13]

Consumers are reallocating their spend toward the more nutrient-dense foods they need to minimize or mitigate possible side effects. This is what's contributing to the "protein-maxxing" trend. Roughly one in four new US food launches now carries a high-protein claim, and it's now driving R&D among grocers and quick-serve restaurants alike.[12]

HOUSEHOLD SPEND, FIRST SIX MONTHS

Snacks and quick-service take the deepest cut; total grocery dips least and reverts first



SOURCE: Circana household panel via AgFunderNews, 2026. See sources 27, 42.

SHELF-LEVEL EVIDENCE

Conagra's "GLP-1 friendly" badges and Nestlé's Vital Pursuit line provide a shelf-level version of social media chatter. Hungryroot's targeted GLP-1 messaging illustrates how the online grocer is turning new consumer behaviors into targeted meal moments. And protein-packed lines from Starbucks, Chipotle, Dunkin, and Sweetgreen show how the revenue opportunity goes beyond the grocery list.

12, 13 BBC News, 2026; Table Magazine, 2026 Food Trends.
27, 28, 29 Circana via AgFunderNews; FoodNavigator; Marketplace.org, 2026.

Side effects are driving beauty demand

While grocery and QSR aim to nourish consumers with evolving culinary needs and palates, the beauty industry is working to solve the pain points of weight loss side effects.

Rapid GLP-1 weight loss creates facial volume loss, skin laxity, and hair shedding, all colloquially recognized as “Ozempic face.” Across 37 related keywords totaling ~310,500 monthly US searches, the top long-tail queries are “how to avoid ozempic face” and “is ozempic face reversible.” In a sample of 27 on-topic TikToks (13.4M views), clinical and warning content accounted for 85% of views, while the single highest-reach video is a doctor debunking the term.[2]

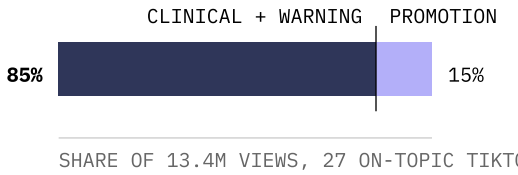
30%

More beauty spending in GLP-1 households than non-GLP-1 households. They are also 2.2x as likely to earn $100,000+.[55]

Brands like Redken and KeraFactor are marketing to GLP-1-related thinning. Redken’s Acidic Grow system was consumer-tested among GLP-1 users, with 91% reporting thicker-feeling hair. Nutrafol states plainly that it offers no GLP-1-specific formula, but CEO Cindy Gustafson stopped short of crediting the drugs for the brand’s momentum: "While we don't break out performance tied to GLP-1 use, growth overall is being driven by increased awareness and a shift toward personalized, clinically supported solutions."[58]

“OZEMPIC FACE” ON TIKTOK

Clinical and warning content takes 85% of views; product promotion takes the remainder



SOURCE: Merciv platform. Sample of 27 on-topic TikToks, 13.4M views, 2026. See source 35.

RETAIL INTEGRATION

Walmart dispenses GLP-1s through nearly 4,600 pharmacies, and its “Better Care Services” platform connects patients to vetted weight-management providers. CVS has also named supporting GLP-1 patients a company priority.

An entirely new category of skincare is also emerging, purpose-built for skin elasticity: Image Skincare’s VOL.U.LIFT GLP-1 4D, Dr. Few’s DermaReverse, SkinCeuticals’ A.G.E. Interrupter Ultra, and Debut’s Elastin Deep Lift.

2 Merciv platform. Google Ads keyword volume, “ozempic face” keyword set.
55, 58 Circana via Winning With Walmart; Progressive Grocer / CNBC, 2026.

“

Hair loss with GLP-1s is real. Products can help with that. … I think there’s some crossover between GLP-1s and aging skin.”

KECIA STEELMAN

PRESIDENT + CEO, ULTA BEAUTY

SOURCE: YAHOO FINANCE, OPENING BID UNFILTERED, APRIL 2026. QUOTED VERBATIM; ELLIPSIS JOINS TWO PASSAGES.

The Next Signal

Viral trends need quantitative research and qualitative analysis

“Protein-maxxing” and “fiber-maxxing” are getting a lot of attention in the media and on social. “Ozempic face” is being used as a throwaway insult that some are trying to reclaim.

Both R&D and marketing teams need to understand the cultural magnitude of these, and other, viral trends. That requires both quantitative research and qualitative analysis.

1 in 4

New US food launches that now carry a high-protein claim.[12]

NEXT STEPS / R&D

- “Protein,” “fiber,” and “micronutrient density” are all the right keywords, but taste is still the most important. The best brands balance all sides so consumers feel like they’re getting the best possible value.
- These new wellness trends don’t always require net-new product development. Look at your current SKUs and see if any formulations support new consumer needs.

NEXT STEPS / MARKETING

- The whitespace in messaging lies in satiety, muscle, and healthy aging, not protein grams alone. Run a messaging exercise to see which benefit messaging aligns with your product value proposition.
- Identify the side effects that align most closely with your product category. Collaborate with product and R&D teams to elevate ingredient and formulation messaging.

12 BBC News, 2026; Table Magazine, 2026 Food Trends.
43, 55 Beauty Independent, 2026; Circana via Winning With Walmart, 2026.

We can never truly eliminate friction. It relocates.

We may be long past the “The Ozempic Effect,” but we’re still feeling the aftershocks of the behaviors it initially normalized.

After their first shot, consumers felt the side effects. They bought new products to alleviate these side effects, from anti-nausea medication to high-fiber snacks. They lifted more weights and ate more protein to bypass muscle loss, and bought smaller clothes as the number on the scale went down. The friction they thought they lost was simply relocated elsewhere, either in the kitchen or at the gym. And while they can wear the effects like a badge of honor, their moral compass is challenged for outsourcing some of the work.

56%

Of users, including 55% of insured users, still say the drugs are hard to afford.[23]

Herein lies the real journey towards personal sovereignty: the same goals that made Ozempic a household name are driving demand for real-time glucose monitors, on-demand lab panels, peptides, and “GLP-3s” that are still being assessed by the FDA.

The ripple effects of GLP-1 culture prove that the friction is never truly gone. It just keeps finding cheaper places to live. Once it moves from the scale, it moves to the mirror, then the grocery store, and a grey market running on social media faster than once-trusted government agencies. That’s the throughline of the age of autonomy. Consumers may have removed some of the gatekeepers to gain control over their wellbeing, but they will still always run into a new barrier.

WHERE THE COST MOVED

The shortage exemption that made cheap compounded GLP-1s legal has ended. The cheapest legitimate branded path today, $149 per month for NovoCare’s Wegovy pill or Foundayo’s starting dose, undercuts most compounded telehealth pricing of $199–$499.

23 KFF, Poll: 1 in 8 Adults Taking a GLP-1 Drug, 2026. Affordability items.

Five inflections for the category next year

05

Our 2027 watchlist reflects the conversations emerging in Reddit threads and TikTok trends and the regulatory developments, both happening in real time.

#	SIGNAL	WHAT TO WATCH	STRENGTH	HORIZON
01	**The protein-to-fiber pipeline**	“Protein-packed everything” is saturating, and demand is rotating toward high-fiber, gut-health foods. Watch fiber become the next front-of-pack claim.	■■■■■	12 MONTHS
02	**Oral-GLP-1 mass adoption**	Novo’s Wegovy pill cleared FDA in December 2025; Eli Lilly’s Foundayo, the first small-molecule GLP-1 pill, in April 2026. The 2027 question is adoption.	■■■■□	12 TO 18 MONTHS
03	**The compounding cliff**	The shortage exemption that made cheap compounded GLP-1s legal has ended. 56% of users, including 55% of insured users, still say the drugs are hard to afford.	■■■□□	12 MONTHS
04	**The retatrutide approval window**	Eli Lilly is following a Q1 2027 filing for its triple-agonist, pushing likely approval to late 2027–2028. Watch the timeline slip and the “GLP-3” hype outrun the label.	■■□□□	18 TO 24 MONTHS
05	**The CagriSema Decision**	A decision on Novo Nordisk’s application is timed for early 2027, but a shareholder lawsuit raises questions about pipeline confidence and disclosures.	■■□□□	12 MONTHS

30, 33 Pharmaranks, 2026; TechTarget, GLP-1 drugs primed for FDA approval in 2026.

■ Strong signal ■ Watch only

Methodology

METHODOLOGY

INSTRUMENT	Research conducted in Merciv: search-interest index trends (5-year), Google Ads keyword volume and trend data, and social/community listening across Reddit and TikTok.
DATES	Search and volume data current to July 2026. Regulatory status current to April 2026.
SAMPLES	Cited third-party studies include n=1,205 (vignette experiments on effort-based sanctions), n=2,491 (research-grade peptide users, May 2026), and an analysis of 2,719 peptide posts on Reddit.
DATA PARTNER	Merciv supplied the research corpus, search-interest and keyword data, and social listening. Future Commerce designed research questions and wrote the analysis and interpretation.
CONVENTIONS	Percentages are whole numbers unless a source reports a decimal. Multiples are written 5x. Search volumes are monthly US Google Ads volume unless stated.

FOOTNOTES FROM THE REPORT

1 Merciv platform pull. Search-interest index trends, 5-year: ozempic / wegovy / zepbound / mounjaro / retatrutide.

2 Merciv platform pull. Google Ads keyword volume and trend data: glp-1, zepbound, ozempic, peptides, compounded semaglutide.

3 Novo Nordisk GLP-1 sales surge: 7 things to know — Becker's Hospital Review.

4 Merciv platform pull. Search-interest index trends: peptides / NAD+ / longevity / retatrutide / orforglipron.

12 Food firms scramble to meet the high-protein craze — BBC News.

13 2026 Food Trends: High Quality Protein and Analog Dining — Table Magazine.

15 In U.S., GLP-1 Usage Reaches New High — Gallup.

19 Weight loss pills and GLP-1s: Stitch Fix, apparel retailers may benefit — CNBC.

20 GLP-1 Shift: $5B Apparel Risk in 2026 — Impact Analytics.

21 Airlines and weight-loss drugs — The New York Times.

22 Weight loss drugs could save airlines money on fuel — CBS News.

23 Poll: 1 in 8 Adults Taking a GLP-1 Drug — KFF.

27 Cuts in grocery spending are not sustained for GLP-1 users (Circana data) — AgFunderNews.

28 Soup-To-Nuts Podcast: How will GLP-1s reshape food in 2026? — FoodNavigator.

29 How rising GLP-1 use is impacting grocery sales — Marketplace.org.

35 Merciv platform pull. Social/community listening: platform active-user reads by drug and category.

40 Anti-obesity medication use sparks effort-based sanctions and social penalties — Scientific Reports (Nature).

41 Weight-loss drugs and mental health — APA Monitor on Psychology.

42 PMC article — National Library of Medicine.

43 Aesthetics Market Growth Cools With Maturation As GLP-1 Boom Tempers — Beauty Independent.

44 How The Democratization Of GLP-1s Might Redefine Beauty And Status — Forbes (Marcus Collins).

45 How Ozempic will change the skin care industry — Cosmetics Business.

46 Consumers Using GLP-1 Medications for Weight Loss Skew Younger and Higher Income — Numerator.

47 Weight Loss Medications and Wellness Resolutions — Tebra / The Intake.

48 Peptide Interest Grows, but Consumers Lack Information Needed to Commit — Athletech News.

49 Peptide Interest Outpaces Infrastructure — Fitt Insider.

50 The Beauty Industry Welcomes a Flood of New Peptide Products as "Peptide Therapy" Trends Online — Glossy.

51 Gen Z Men Turn to Unregulated Peptides for Performance, Wellness — NewsNation.

52 Confidence in Institutions Remains Near Record Low — Gallup, July 2026.

53 GLP-1 Receptor Agonist Market — Grand View Research.

54 GLP-1 weight-loss market may double to $190 billion by 2035 — Morgan Stanley Research.

55 GLP-1 users are losing hair; the beauty category is finding another tailwind (Circana) — Winning With Walmart.

56 Meta Trends 2026 — Matt Klein, kleinkleinklein.

57 GLP-1s and diet culture — Everybody Consulting.

58 The evolution of grocery pharmacy: how GLP-1s and AI are transforming retail health — Progressive Grocer / CNBC.