thrivable

THRIVABLE 365

Q4 2026 REPORT SUMMARY

Weight Managment Medications

HIRED,FIRED, REHIRED: WHAT WMM PATIENTS NEED NEXT

What 743 current, former and prospective WMM users need from treatment, and where they succeed, stall or stop.

BEFORE YOU DIG IN

1

What is Thrivable 365?

Thrivable 365 is a syndicated patient research program for pharma commercial teams competing in the incretin market, delivered four times a year. Each report combines quantitative questions, 1,000+ audio-recorded patient responses, and an annual conjoint into a single narrative, so you see where the market is heading by understanding not just what patients are doing, but why.

2

What this report answers

Weight management isn't one market. It's dozens, each with its own diagnoses and motivations. This report asks a different question: what job are patients hiring a weight management medication (WMM) to do, and where do they succeed, stall or stop?

3

How we approached the research

We built the survey around the jobs-to-be-done framework, which compares how important each "job" is to patients with how well their current approach is doing it. We surveyed current, former, and WMM-naive patients, including more off-label respondents (lower BMI, no indicated comorbidities) than in past reports. Insights are directional: a data point among others, not a prediction.

IN THIS PREVIEW

Executive Summary	The four headline findings from the study, at a glance.
Introduction	Why this market is changing shape, and why the job matters more than the patient profile.
About the Study	Who we talked to, and how the research was fielded.

EXEUCTIVE SUMMARY

Why jobs to be done?

When a market grows beyond one kind of patient, demographics tell you who is in the room, not why they came. The same weekly shot is bought by a 66-year-old afraid of a diagnosis and by a 41-year-old who just wants to stop thinking about food.

That's why we built this survey around the jobs-to-be-done framework, which compares the importance of "jobs" that people "hire" a product to do to whether or not the product is accomplishing those "jobs".

Respondents rated and ranked more than 50 functional, emotional and social jobs. Alongside their open-ended responses, that surfaced **five key findings**, which we unpack in the full report.

Key Findings

Naive respondents aren't satisfied with their current approach to weight management, but fear may be stopping them from adopting a WMM. Most people who have never taken a WMM say their current approach isn't meeting their needs. Yet on average, they're three times as likely to worry about a side effect as experienced users are to report it as moderate or severe.

The treatment journey is progress followed by a plateau. When we compare respondents by how long they've been on treatment, weight loss tends to level off around 18 months. Respondents that far in who started out wanting to lose 20%+ fall into three groups based on how much more they want to lose. Maintainers want to lose less than 7.5% more of their body weight, Middlers want to lose 7.5% to 20% more, and Maximizers still want to lose 20%+. Each group needs something different from treatment from that point on.

A satisfied market still has cracks. 82% of current respondents plan to stay on their WMM next year. They say routine and good results keep them there.

The biggest frustration among all respondents may be price. Next come durability (keeping the weight off), muscle loss, and side effects that worsen over time: hair loss, constipation, and sagging skin.

Insurance splits the market in two. Cash-pay and insured respondents' experiences differ, across much of the WMM experience.

Weight management isn't one market. We identified four preliminary segments by the top job patients hire a WMM to do: Diagnosis-Driven, Watchful & Worried, Cycle Breakers and Confident Optimizers. Two-thirds of respondents reflect the market WMMs were originally built for. The rest show the behaviors likely to shape what comes next.

INTRODUCTION

In a rapidly-evolving market, understanding how patients think about their options is critical to success.

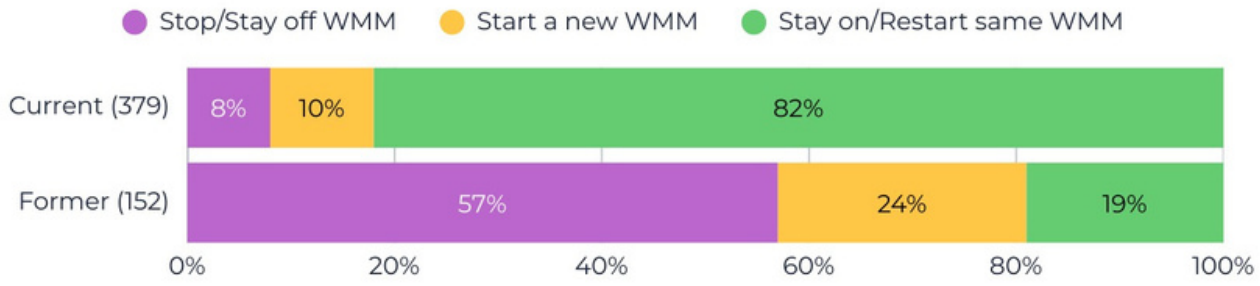
The weight management market has never had more options, or more kinds of patients. What began as a treatment for diagnosed conditions is starting to behave like a consumer market, where patients hire and fire brands based on the job they need done.

The shift already shows up in our respondents. Sorted by the year they started, patients move from heavier, diabetic and insured toward lighter, younger, cash-paying and weight-motivated. A strategy aimed at "the WMM patient" may miss most of them.

This report looks past today's medications to the opportunities emerging for tomorrow's. It's a one-time snapshot of a fast-changing market, built to orient strategy and point toward future research, not to answer for a single molecule, price point or segment. For that level of precision, semi-custom or custom research scoped to your product is the better next step.

82% of current respondents plan to stay on their WMM for the next year. Among former users, 43% plan to restart. Satisfied or not, patients keep moving, and the reasons they stay, switch or stop are what this report is about.

In the next year, do you plan to stop, switch, or restart [your WMM]?
(n=531 current and former respondents)



ABOUT THE STUDY

743

743 respondents: 379 **current**, 152 **former***, and 212 WMM **naive** users with some interest in starting a WMM.

Conditions (respondents may have more than one)

- 200 Type 2 diabetes
- 259 Obstructive Sleep Apnea
- 350 Hypertension
- 327 High cholesterol
- 161 MASLD
- 145 Peri / Menopause

**Former users have taken a WMM in the past, aren't taking one now, but may start again.*

Fielded from Thrivable's 140,000 cardiometabolic patient panel

One 30-minute survey mixing quantitative and open-ended questions

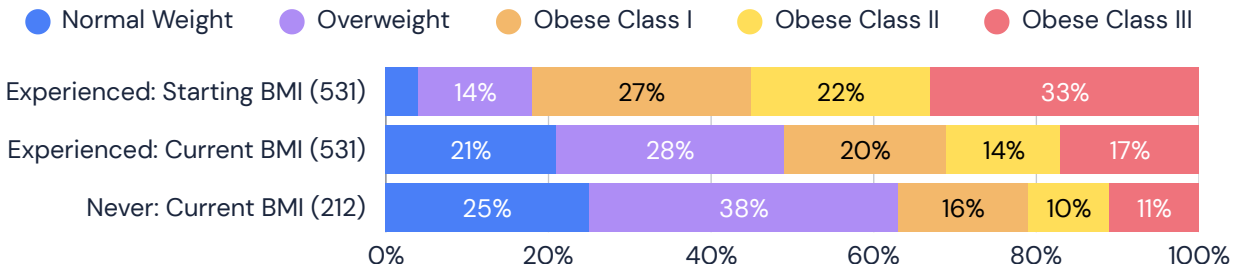
Fielded September 26 – October 8, 2026

Key conditions were oversampled. Results are unweighted.

Findings are directional and reflect Thrivable's patient panel. Sample sizes (n) vary slightly from question to question because of a small number of blank or outlier responses that were excluded.

BMI

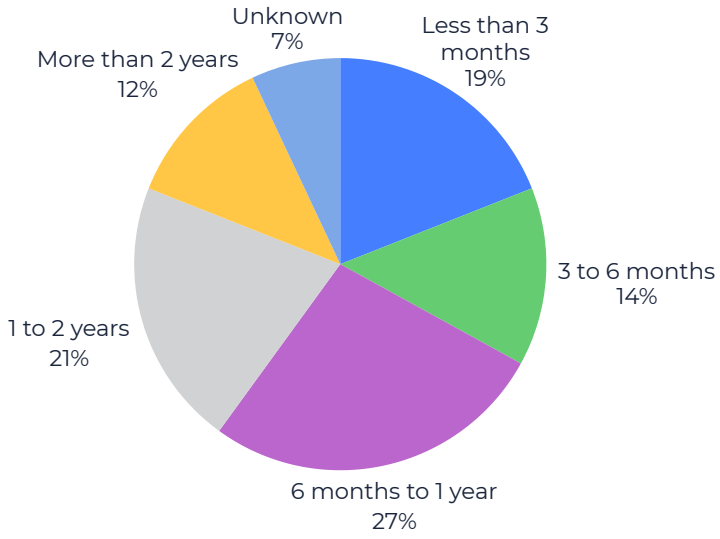
n=743



Length of Time on GLP-1 Brand*

n=531 experienced

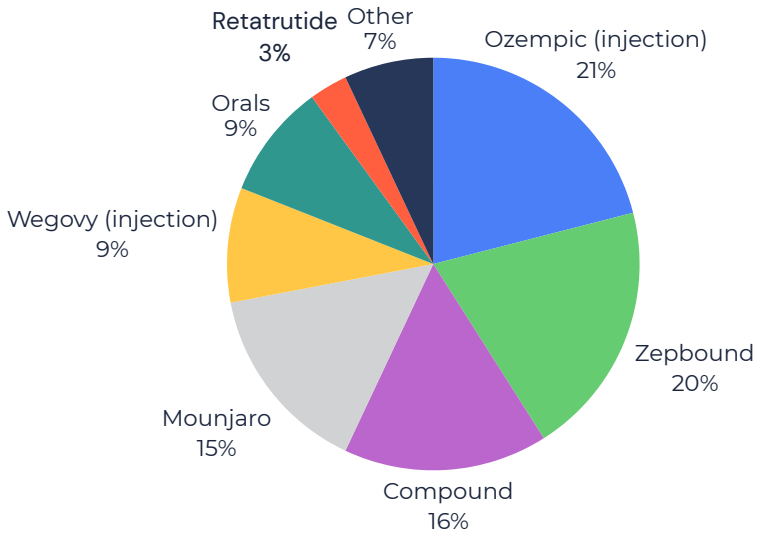
**Current / most recent GLP-1 brand*



GLP-1 Brand*

n=531 experienced

**Current / most recent GLP-1 brand*



You've seen the preview. Get the full picture.

Thrivable 365 delivers ongoing, patient-grounded research on the therapies and markets shaping weight management. Here's what the complete report unpacks:

1. **Uncertainty Before the Start**
   What WMM-naive patients need, and the worries that keep them on the sidelines.
2. **A Journey of Progress and Plateaus**
   How goals shift over time, where progress stalls, and why patients stretch doses or stop.
3. **Opportunities in a Satisfied Market**
   What keeps patients on treatment, what pulls them toward something new, and what they'd pay.
4. **Hired for a Reason**
   Four segments defined by the job patients need done.
5. **Key Takeaways**
   A strategy aimed at "the WMM patient" may lead you astray, causing implications for the commercial success of your product.

Talk to our team

Unlock the full report