Appetite for Disruption:

What GLP-1 means for consumer markets

A snapshot on Apparel: new size, new style

July 2026

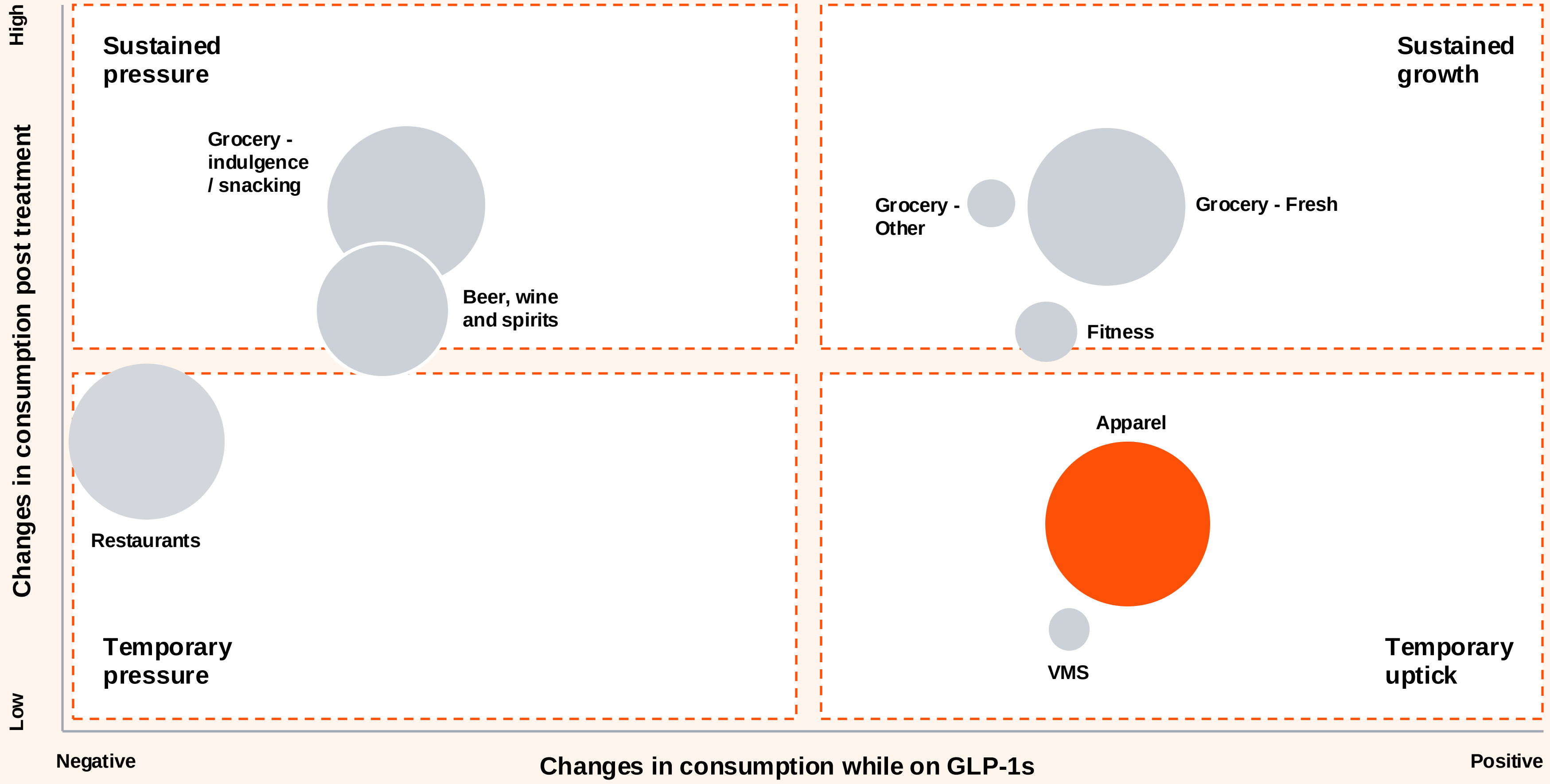
Impact of GLP-1 on Apparel: the wardrobe reset

When bodies change, wardrobes do not simply refresh - they reset.

GLP-1 drugs are already changing how millions of people in Britain eat, drink, exercise and shop. And society is only just beginning to understand the impact on **Britain's bodies, baskets and businesses**. We surveyed more than 2,300 UK adults to explore who is using GLP-1 and how it is changing their behaviour. The findings are important for any brand or retailer trying to win spend from GLP-1 users.

For **Apparel**, GLP-1 is driving an overall spend increase as consumers move through size changes, rebuild wardrobes and invest in categories that support new routines and renewed self-image. The opportunity is not just more clothing spend, but more precise moments of need: transition sizing, fit flexibility, activewear, occasion wear and post-weight-loss style reinvention. The challenge for brands and retailers is to capture these wardrobe reset moments before they pass, while designing for consumers whose bodies, confidence and routines are still in flux.

Stickiness of GLP-1 spending behaviour: consumption changes during GLP-1 usage and after GLP-1 usage



Key: Current Market Size (£1bn)
Focus of this paper

Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact, Strategy& Analysis

The GLP-1 Apparel basket: new size, new style

Fit in flux

As bodies change, the wardrobe needs a refresh to meet both functional and emotional triggers. During GLP-1 use, 42% of users increased apparel spend (versus 11% decreased spend), resulting in a +31ppt net spend intent across current and past users. Among those spending more, the biggest driver is functional: 74% needed new clothes due to weight loss or size change. GLP-1 creates the purchase trigger, but fit uncertainty shapes the sale. For brands, the opportunity is to help consumers dress through size change with flexible fits, clearer sizing and greater confidence that what they buy today can still work tomorrow.

Basket reallocation

GLP-1 users are not only replacing clothes that no longer fit; they are also feeling ready to shop differently. Among those spending more, 60% cited increased confidence with a desire to buy more or treat themselves. Spend is reallocating towards categories most closely linked to the GLP-1 journey: 33% are buying more activewear or sportswear, 22% are buying more occasion or going-out clothing, and 32% say they are enjoying shopping more than before. The winning brands will connect apparel to confidence and movement, especially across activewear and occasion wear.

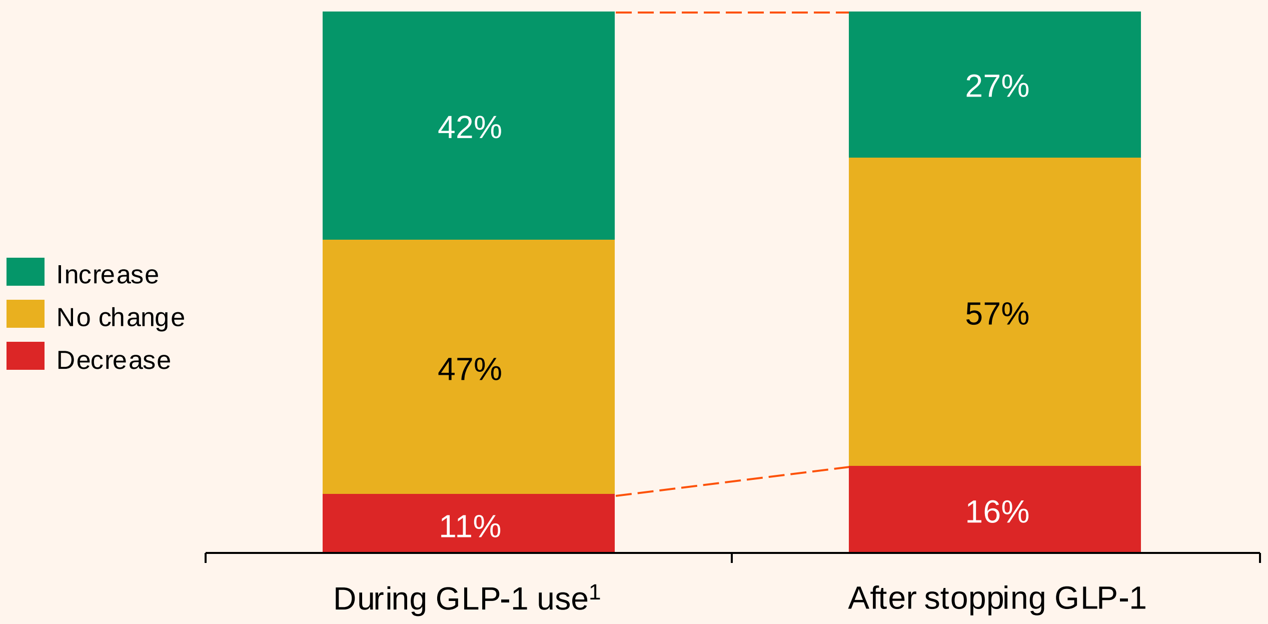
Behaviour stickiness

Apparel demand persists after treatment. After stopping GLP-1, 27% of users still spend more than before GLP-1 (versus 16% who spend less), driving a +11ppt net spend intent. 28% of the users say they are buying fewer new items overall after stopping GLP-1. For brands, the opportunity is to capture immediate replacement demand during treatment and then to re-engage shoppers once they are ready to refresh after stabilisation.

Apparel spend increases during GLP-1 use; Apparel demand appears sticky beyond treatment, but the level of uplift moderates

Changes in Apparel spend intentions, compared to before GLP-1 usage
% of respondents

Net intent[2]:	**+31%**	**+11%**



Notes: 1) Current GLP-1 users and previous GLP-1 users who have not taken GLP-1s in the past 12 months; 2) Delta between proportion of respondents indicating positive and negative change in spend intention | Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact, Strategy& Analysis

The GLP-1 Apparel basket: the new confidence and joy across groups

Size change is the common trigger, but women and mid-life shoppers lead the reset

Size change is the strongest driver of higher apparel spend across every segment, but the effect is strongest among women and mid-life consumers. Among GLP-1 users spending more, 84% of women cite needing new clothes due to weight loss or size change, compared with 57% of men who said the same. Spend increases are also strongest among 35-44s and 45-54s, at 84% and 91% respectively. However, this demand does not always convert immediately: among 11% GLP-1 users who are cutting back on apparel, 75% of women are waiting for their weight to stabilise, versus 44% of men.

The implication: Gender and age could guide range bets, but flexible size and fitting will convert the demand.

Shopping feels more like a self-treat, especially for mid-income shoppers

GLP-1 is increasing focus on how users look and feel: 47% of GLP-1 users report higher spending on personal style and appearance since treatment. This translates into a clear confidence effect: among users spending more on apparel, 60% cite increased confidence and wanting to buy more clothes to treat themselves, a driver that holds up across gender and age groups. More broadly, 32% say they are enjoying shopping more than before, rising sharply to 59% among £35k-£50k earners, compared with 17-29% across other income bands. Only 8% say they are trading up to more premium brands because of GLP-1.

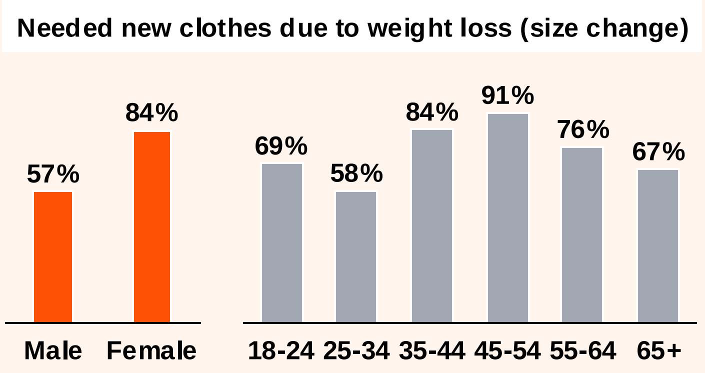
The implication: Confidence sparks the appetite to spend, but affordability will be key to unlock the discretionary spend for most.

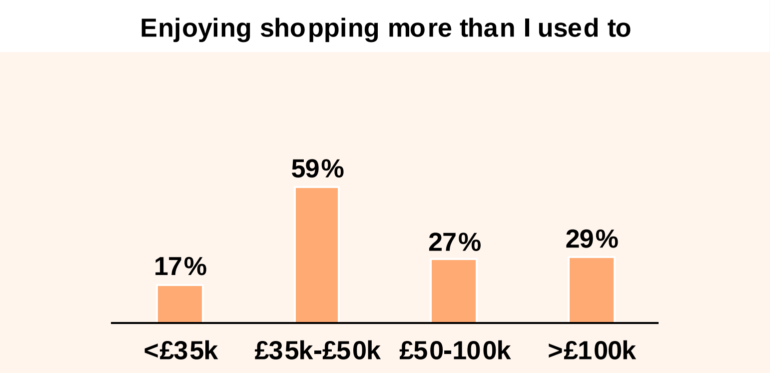
New routines and new occasions change mix, especially active and occasion wear

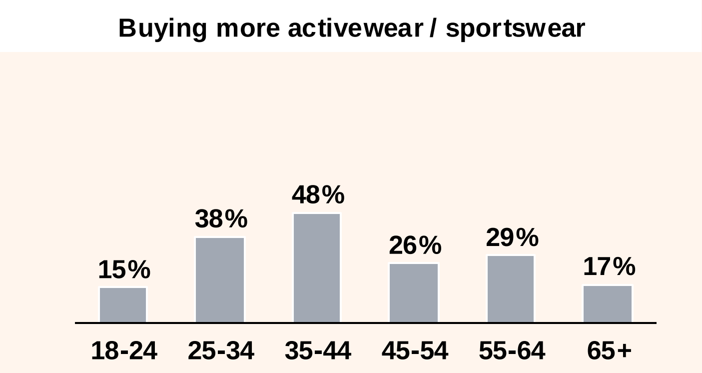
New routines and social occasions are reshaping the apparel mix. Among GLP-1 users spending more on apparel, 33% are buying more activewear or sportswear, making it the strongest category shift after size-change replacement. This skews towards working-age consumers, peaking among 35-44s at 48% and £35k-£50k earners at 44%, suggesting activewear is linked to new health and movement routines. Occasion and going-out clothing is a smaller but distinct opportunity at 22% overall, skewing younger, with 31% of 18-24s and 30% of 25-34s buying more in the category.

The implication: Targeted product range will capture different shopper missions: one supports progress, the other celebrates the change.

Behaviour change[1] by demographics
% of respondents







Notes: 1) What drove the increase in spend on your footwear & clothing after starting GLP-1? Please select all that apply. The % represent the percentage of respondents who choose the listed behaviour statement.
Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact, PwC Voice of Consumer 2026 (UK data), Strategy& Analysis

Winning the GLP-1 wardrobe: flexible fit, confident spend

Reshape what's at risk

Apparel operating models were built around relatively stable bodies, predictable size curves and seasonal replenishment. GLP-1 disrupts those assumptions. As consumers move through sizes faster, retailers need more agility across sizes, fit, inventory and returns.

- Re-engineer fit blocks and grading around changing body shapes, especially the waist, hips and bust
- Build faster size-level forecasting into replenishment and allocation to stay ahead of sizing volatility
- Make fit confidence part of the proposition, with clearer sizing, better fit tools and frictionless exchanges

Capitalise where value is moving

GLP-1 users are buying more apparel to replace clothes that no longer fit and to express renewed confidence and energy. GLP-1 users are looking to refresh wardrobes on both counts. Brands need to capture both the practical size-change moment and the discretionary confidence dividend.

- Prioritise flexible fits and adjustable designs to reduce hesitation before weight stabilises
- Accelerate activewear ranges that support new movement routines and the wider wellness stack
- Build confidence-led edits across occasion wear, going-out clothing and elevated everyday style

Collaborate beyond the wardrobe

For GLP-1 users, apparel sits within a broader journey of weight loss, weight maintenance, fitness and wellness. Brands and retailers can create more value by connecting clothing to the moments and services that surround body change.

- Partner with fitness, wellness and styling creators to connect activewear to new routines and occasion wear to renewed confidence
- Explore rental, resale and subscription models to support transition wardrobes without over-investment before stabilisation
- Work with tailoring, alterations and resale partners to help customers adapt, resize or recirculate wardrobes as their bodies change

> “GLP-1 is creating a new kind of apparel shopper: one whose body, confidence and routines are changing faster than traditional ranges were built for. Brands and retailers need to provide more than just new clothes. They need to give reassurance about wardrobe solutions and build emotional connection at a critical moment in customers' lives."

Jacqueline Windsor

Strategy& Partner and UK Head of Retail

Please get in touch to hear more

About the consumer survey methodology

In June 2026, Strategy& conducted a comprehensive survey of 2,315 UK consumers aged 18-65+ to understand who is using GLP-1 (current and past), why they are using it, how they are accessing it, and how they are changing their spending habits across grocery, alcohol, VMS, apparel, restaurant and fitness categories. The survey was run before the approval of the GLP-1 pill for weight loss in the UK.

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