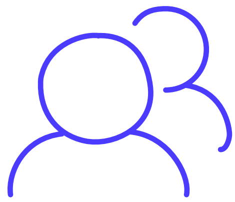
October 2025

Emerging Trends

Vypr Predict

What's driving consumer behaviour in **food & beverage**

Highlights



79% trust protein products with fewer, recognisable ingredients, highlighting the power of clean labels.
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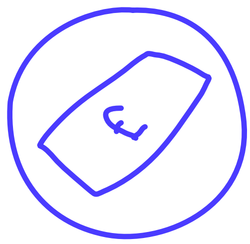
41% of consumers look for "low in sugar" over "high in protein", showing a shift toward everyday health claims.
Page 5



40% say protein snacks are too expensive, making cost the top purchase barrier.
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48% of UK consumers are **unsure how GLP-1 drugs affect appetite**, showing a significant education gap.
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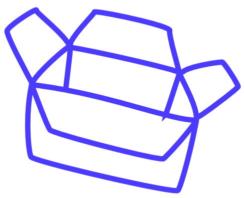

Women 25–54 are **2.9x more likely than men to choose high-protein snacks** after using GLP-1 medications.
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In Brief

Protein has entered the mainstream, but not without friction. While many consumers associate it with health, price sensitivity and scepticism about ingredients remain major hurdles. Clean, natural formulations inspire confidence, while complex labels deter purchase. At the same time, the rise of GLP-1 medications such as Ozempic and Wegovy is influencing portion control and snack selection, especially among women over 25.

Protein in focus

While high-protein snacks hold appeal for certain consumers, perceptions vary widely depending on factors like price, ingredients and health claims. Understanding these drivers and the demographic differences behind them can help brands position protein products more effectively in a competitive snacking market.

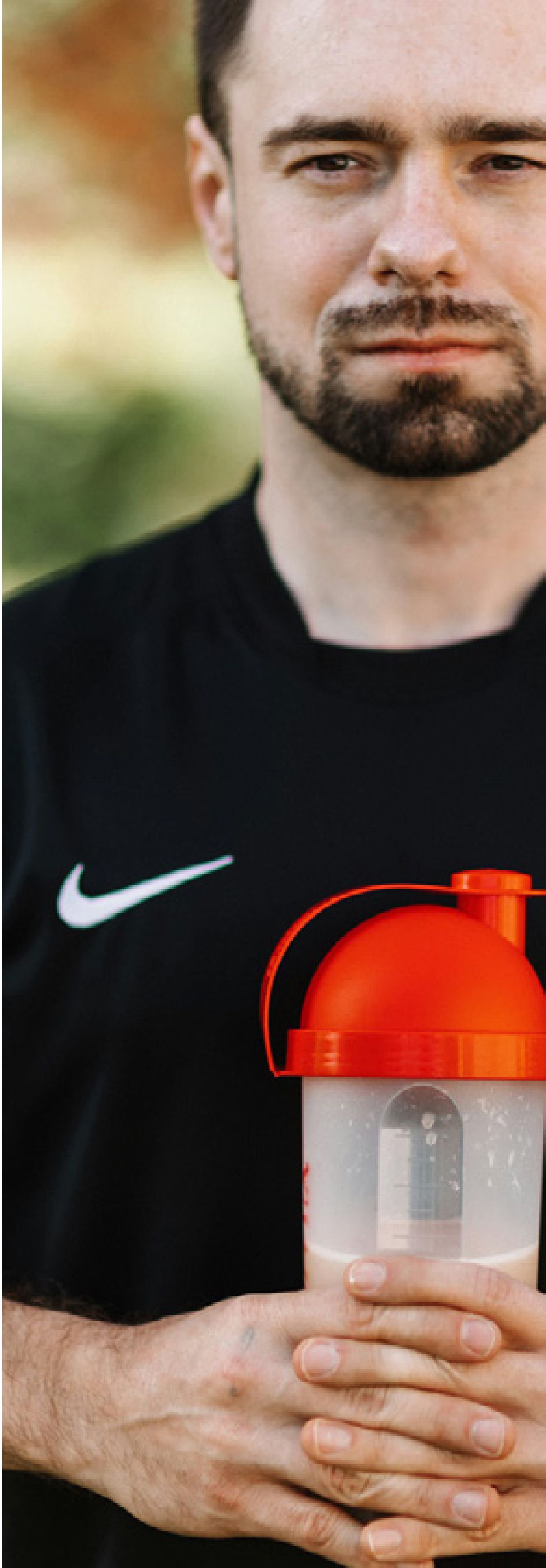
Perceptions around protein

A standard chocolate bar is the top choice for snackers, with 55% selecting it as their go-to treat over a protein option. This sentiment rises with age, as over-55s are 1.6x more likely to grab a classic bar than the 18- to 24-year-olds (65% vs 41%).

There is some appetite for protein treats however, but the number of ingredients on the package matters. Around one in three (31%) consumers enjoy protein bars with fewer and more recognisable ingredients. Women are slightly more inclined than men to prefer this (32% vs 29%). By contrast, when there are a lot of ingredients which feel unrecognisable to consumers, less than one in seven (13%) will choose it. For women over the age of 45, that number shrinks to almost one in twelve (7%).

The types of ingredients used in a protein bar also correlate to confidence levels. Almost four in five (79%) customers would be more inclined to trust snacks with fewer and more natural ingredients. Within this group, almost two in five (39%) would "definitely" feel more assured.

The remaining one in about five (21%) of consumers remain sceptical, indicating that they would not trust protein snacks even with fewer ingredients.



High protein is not perceived as the healthiest claim

When looking for healthier choices in general, more than two in five (41%) consumers gravitate towards "low in sugar" claims on packaging. Slightly less than two in five (38%) opt for foods which promote "natural ingredients". While around a third (34%) look for the phrase, "low in calories".

Protein claims are less sought after, with just over one in four (26%) consumers considering this the most compelling health claim. However, some groups value protein messaging more than others. Men between the ages of 18 and 24 care the most and are 1.5x more likely to be persuaded for this claim when seeking healthier choices (40% vs 26%).

Australian shopper spotlight

When choosing a snack, high protein content is a stronger signal of a healthier choice for Australians (40%) than for UK consumers (26%), suggesting protein plays a bigger role in shaping perceptions of health and wellbeing in Australia.

When consumers see "high protein" on food packaging, they have a mix of views. One in four (25%) do not have any associations or assumptions about the claim. However, the same proportion of consumers (25%) are inclined to think that protein products are made for people who are very into fitness. Slightly less (24%) believe that the food will make them feel fuller for longer. While one in five (20%) presume the protein product must be healthier than traditional alternatives.

Reassuringly for brands, just 6% would be put off by a protein label because they associate it with a worse taste. Young women (18-to-24 year olds) are twice as likely (12%) to hold this view, suggesting that they may have had some negative experiences.

Barriers to purchase

A significant portion of customers are put off by the high prices of protein snacks, with nearly 40% saying they are too expensive. The second most common barrier is the perception of artificial ingredients, with just over one in five (22%) people putting a high-protein snack back on the shelf for this reason. A similar proportion (20%) believe that the product is not intended for them as it is too targeted towards the fitness demographic. Perceived texture and taste can also put some people off, around one in six (18%) think the product will feel unpleasant, while just over one in ten (11%) consider that the flavour will be worse.

What puts you off buying high-protein snacks?

Multi-answer steer - sent to a nationally representative sample

Too expensive	40%
Artificial ingredients	22%
Too targeted at fitness	20%
Nothing puts me off	19%
Taste	18%
Texture	11%

Top incentives

Price also plays a key role when incentivising consumers. More than one in three (34%) would be tempted to buy a protein-based snack if it were cheaper.

Health is another top motivator. Around one in four (27%) would be most influenced to buy a high-protein snack if it contained healthier ingredients. Similarly, clearer health labels would persuade one in five (20%).

Luxurious flavours and more convenience play a lesser role, garnering just 12% and 7% of votes, respectively.

Almost four in five (78%) of consumers have some perceptions of high-protein snacks. Within this group, there is a mix of reactions. One in two (50%) have broadly positive associations, considering the products as good everyday options (29% of this group, 23% overall) or better ways to treat themselves (21% of this group, 16% overall).

Just under one in three of this group (30%, or 23% overall) consider it to be just a marketing label, suggesting a more negative or neutral connotation. Meanwhile, one in five (20% of the group, or 15% overall) see protein snacks as something to aid exercise.

Top protein purchases

The 25-to-34 year age group consumes the most protein products. They buy 1.2x more meat and poultry for this reason, on average (45% vs 38%). Women aged 25-to-34 are also 1.2x more likely to put a yoghurt or dairy product in their basket for its protein properties (37% vs 31%).

By contrast, men over the age of 55 are around a third less likely to seek out protein compared to the overall population (44% vs 29%). This makes them the group that is the least drawn to the value of protein.

High protein snacks and drinks are less popular, but the convenience appeals to certain demographics more than others. Men aged 35-to-44 particularly enjoy protein drinks and are more than twice as likely to pick one up (31% vs 13%). Women in the next age category of 45-to-54 are also 1.7x more likely to opt for a high protein snack compared to the population average (24% vs 14%).

GLP-1s and eating habits

This section explores how GLP-1 medications (like Ozempic and Wegovy) are influencing consumer behaviour, perceptions and product preferences, both from the perspective of the public and current users of these drugs. It covers awareness and assumptions around GLP-1s, what product formats and labels appeal to this audience and how appetite changes might shift snack choices or drive demand for new formats.

The findings are drawn from both nationally representative samples and targeted panels of current GLP-1 users, offering insight into real behavioural shifts and emerging expectations for food brands.

Popular but poorly understood

Education around GLP-1 medications is generally low in the UK. Around one in two (48%) did not attempt a multiple-answer question around whether GLP-1 users could experience any changes in their eating habits.

Among those who did try, most (39% or 20% overall) respondents opted for "smaller portions", which is generally correct. A similar proportion (38% or 20% overall) felt that the medication could lead to "less snacking", which could be correct but is not considered the norm.

Very few people (21% or 11% overall) felt that GLP-1 users would seek higher-protein foods. However, this is one of the most common outcomes according to current research, further suggesting a lack of education.

Australian shopper spotlight

In the UK, nearly half of people (48%) are unsure how GLP-1 might affect eating habits, with only 20% expecting it to lead to smaller portions. In contrast, Australians are much more certain, with 42% expecting smaller portions and just 10% saying theyŒe unsure.

This suggests UK consumers may be less familiar with the effects of GLP-1, while Australians are more likely to anticipate speciÞc changes to lifestyle and diet.

Overall, women tended to focus more on the quantity of food, selecting “smaller portions”, “less snacking”, “more mindful eating”, and “avoiding rich foods” more than men. Meanwhile, men were slightly more inclined to focus on the content of the food, opting for “focus on protein”.

Reframing the question in a different way, we asked respondents to prioritise the most helpful way to serve food to a GLP-1 user. When pushed to select just one answer, the majority selected either “smaller portion sizes” (35%) or “more protein per bite” (20%), which are generally considered the most correct answers in the list.

Over-45s were the most likely to select “portion sizes”, (45% vs 35%), while men aged 18 to 24 gravitated towards “more focus on protein” (31% vs 20%). This ties in with some of the findings in the previous section, that young men are generally more knowledgeable and engaged with protein consumption.

While most respondents selected correct answers, more than two in five (44%) went for other options, further highlighting a nationwide lack of education.

Overall, women are slightly (1.3x) more optimistic about the potential of GPL-1 medications than men. In a free-text question, women tended to feel that weight-loss drugs would help users change their eating habits. Whereas men were split with equal numbers of positive and negative sentiments.

Driven by women, the general feeling is that GLP-1 drugs can create better eating habits. Comments such as, "Yes, I think people will eat smaller portions", and "I think it will be healthier foods" occur frequently.

However, there is also a strong dose of scepticism. Sentiments such as, "Most will just carry on eating rubbish because they have a magic pill to solve it (or so they think)" and "most people will use them as a way not to change their habits, but to use the medications and injections as a way to cheat and not gain weight" also came up often.

Despite the lack of education, just two respondents replied that they were unsure about the effects. This indicates that many of the strong opinions may not be supported with evidence, but possibly hearsay or stereotypes.

Making the most out of Vypr Predict

Expert insight tip from Chloe Wilk (Head of CIT)

Health and wellness culture has rapidly evolved, fuelled by social media trends, new weight loss medications and growing awareness of longevity. With demand rising for clean-label products and portion-controlled options that deliver satiety, food and drink businesses must be ready to innovate.

Vypr's free text steer is ideal for early ideation in these markets, especially on complex or sensitive topics like weight loss. Using larger samples and filtering for specific audiences gives a clearer read on opinion, while our AI-driven free text analysis goes beyond traditional sentiment tools to accurately capture the nuance of mixed consumer views.

Top tip: *When exploring health-related innovation, combine large, diverse samples with targeted filtering to capture the full spectrum of consumer sentiment.*

GLP-1 users: Market needs and preferences

As GLP-1 medications become more commonplace, there is a growing opportunity to serve this increasing market gap. Zooming in on consumers who are currently taking GLP-1 medication, we uncovered what kind of snacks they now prefer, as well as which packaging claims best resonate.

Women seek protein-rich snacks, while men opt for smaller versions of classic treats

Within the GLP-1 group, women were almost three times (2.9x) more likely to pick up a protein-rich treat than men (52% vs 18%). This trend was driven by women between the ages of 25 and 54 and peaked with the 35-to-44 age group, who were 3.3x more likely to opt for high protein snacks than men (60% vs 18%).

Less than one in five (18%) of men were drawn to the high-protein snacks, sinking to around one in 20 (6%) for the 25-to-34 age group. Instead, they tended to prefer other adaptations such as smaller versions of indulgent treats (30%), low-calorie snacks (28%), or nutrient-packed smoothies (one in seven). As well as having more of a mix of views, they were also harder to please with around one in seven (14%) not liking to idea of any of the treats, 3.5x more than the women.

Women under the age of 25 were generally more aligned with the men, as few (20%) preferred protein-rich snacks, and instead, three in five (60%) would prefer a smaller version of an indulgent treat. For marketers, this demonstrates that smaller versions of classic refreshments could appeal to both men and young women.

Exploring claims on packaging

More than two in three (68%) GPL-1 users would be at least curious to try food products with a clear “GLP-1 friendly” label. Within that group, the majority (71% or 48% overall) would respond positively, mostly led by women over the age of 35.

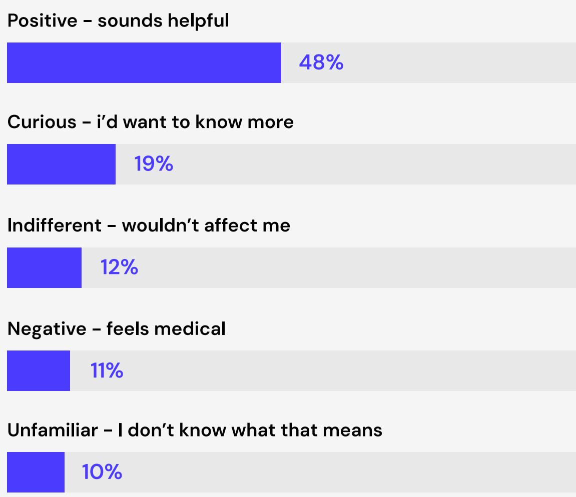
For women, appreciation for the claim seems to rise with age. Gen Z women between 18 and 24 years were 4x (40% vs 10%) more likely to dislike the claim, because of its medical connotations.

As young people can be more image-conscious, they may also feel that this label showcases something that they prefer to keep private. By contrast, women between the ages of 45 to 54 were 1.6x more likely to approve of a “GPL-1 friendly” claim, compared to the overall average (78% vs 48%).

Men aged 45 to 54 were the most unfamiliar with the claim, 3.1x more than the population average (40% vs 13%). This is an interesting finding, as all the respondents in this group are taking GPL-1 medications themselves, speaking to a wider lack of general education on the topic.

For those who did seem to understand the claim, men aged 25 to 34 showed the least interest, and are more than twice (2.3x) as likely to feel indifferent about a “GLP-1 friendly” claim. However, within this same demographic, just under half (47%) showed a strong appreciation for the claim, creating some mixed responses.

If a product said it was “GLP-1 friendly” or designed for appetite management, how would you feel?



Single-answer steer sent to GLP-1 users

As we covered in the section above, women aged 18 to 24 showed a strong dislike of the "GPL-1 friendly" claim, with around two in five finding the medical connotations off-putting. However, this demographic is not closed off to GPL-1 packaging claims altogether. Compared to the overall average, women aged 18 to 24 responded 1.6x more positively to subtler claims like "Designed for people eating less" (100% vs 62%) – although it is worth noting that the sample size was small. This group could be the most sensitive to claims, and so marketers targeting them should be careful not to come across as overly obvious or medical.

While women of all ages responded quite positively to the subtler claim, it was the men who showed the most confidence. Men were 1.6x more likely to select "I'd want to try it" than women (36% vs 22%), driven by the under-55s. The demand peaked among men aged 35 to 44, who were 1.8x more likely to put this product with this claim in their basket (47% vs 26%). This indicates the power of subtler claims holds, creating a broader appeal across demographics.

The world of GPL-1 medications is still nascent in the UK, and already potentially plagued with strong but uninformed public opinions. While many people cannot answer simple questions on how the drugs could alter appetite, they are relatively quick to offer sceptical views.

There are some silver linings however, when asked to select one answer, just over half of the population will make a good estimate of what kind of foods are helpful for GPL-1 users. Women are more inclined to focus on portion size, while men tend to look more at the contents of the food.

Zooming in on GPL-1 users themselves, there could be a gap in the market for protein-rich snacks and smaller versions of indulgent treats. Women over the age of 25 tend to prefer the high-protein content, while younger women and men of all ages opt for the mini-indulgent treat.

Blunt claims on the packaging are generally well-received and appeal most to older female GPL-1 users. However, subtle claims resonate with more people, especially younger women.

Key Takeaways

1. Protein is mainstream, but trust and cost define success
High-protein products are now everyday purchases, not niche performance foods — but 40% of consumers still see them as too expensive. Brands must simplify labels and keep pricing realistic to drive credibility and trial among wider audiences.

2. Clean labels are key to confidence
Shoppers are more likely to trust brands with fewer, recognisable ingredients, with 79% saying this increases purchase intent. Communicating ingredient transparency in plain language will help close the trust gap.

3. GLP-1 use is reshaping health expectations
The growing use of GLP-1 medications is influencing portion size, satiety, and snack choices — especially among women 25–54. Food brands should anticipate this shift by developing portion-controlled, protein-dense options that fit emerging wellness habits.

4. Education is the next frontier for health-driven innovation
With nearly half of consumers unsure how GLP-1 drugs affect appetite, the opportunity lies in brand-led education. Clear, empathetic messaging can build authority while supporting informed, sustainable health behaviours.

Conclusion

Across the food and beverage landscape, consumers are seeking a sense of balance, between functionality and flavour, indulgence and intention, health and affordability. **Rising living costs continue to shape behaviour**, pushing shoppers to be selective not only about what they buy, but why. Protein has evolved from a niche fitness term to a mainstream health marker, yet its success depends on whether brands can deliver both trust and value. Clean labelling, transparent sourcing, and concise ingredient lists have become key to credibility.

The growing awareness of GLP-1 medications adds a new dimension to food choice. Appetite management and portion control are increasingly shaping perceptions of what a "healthy snack" looks like. Consumers are learning to navigate a world of new health tools, and brands must support them with accessible, inclusive messaging that speaks to wellbeing rather than restriction.

The opportunity ahead lies in making health both attainable and enjoyable. Brands that balance nourishment with flavour, and authenticity with innovation, will capture consumers seeking sustainable, everyday wellness. This is not just about adapting to dietary shifts, it is about anticipating how science, lifestyle, and affordability will continue to redefine the future of food.

Better decisions, winning products.

Are you ready to redefine your product development strategy and secure a competitive advantage in your industry? Find out about the power of Vypr today.

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