A STICKYBEAK REPORT

The shifts reshaping FMCG

Five trends changing how FMCG consumers eat, spend, and buy.



Stickybeak

STICKYBEAK.CO

Rapid, global consumer feedback for FMCG brands.

Hi, we're Stickybeak

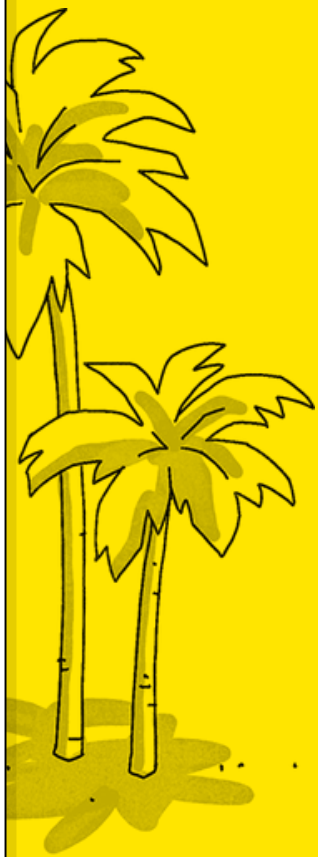


We're the consumer testing platform for marketers.

We help brands put a claim, a pack, a concept or a campaign in front of real consumers and get a clear (research-approved) answer back in hours, not weeks. We test all your marketing stuff, anywhere in the world, so you can make smarter decisions with more confidence.

Which is also how this report happened. Testing is what we do all day, so when we got curious about how shoppers are thinking and buying, we launched a group of tests on different topics to hundreds of consumers around the world. Then in true Stickybeak style, we pulled out all the best and interesting bits to create this report just for you.





Researched and authored by Erin Maddren, Research Manager at Stickybeak. Testing by Lauren Honeycombe.

Why this matters

Once a trend has been around long enough, it is treated as settled and built straight into packs, range reviews and launch plans.

Going into 2027, five of them aren't going anywhere: fibre catching up to protein, GLP-1s changing the basket, treats surviving a tighter budget, own label closing in on the brands, and AI moving in on the shop. The question now isn't whether they're real, it's how they're playing out in shoppers' baskets. And this never sits still for long.

Shoppers have been quietly changing their minds about some pretty basic things, what counts as a good meal, what's worth paying extra for as a treat, how much of the shopping decision they're happy to hand over to a chatbot. These shifts show up small: a claim that lands differently than expected, an own label pick suddenly rivalling the brand beside it, a shopping list a shopper is happy to let AI build.

The trouble is, a trend is rarely black and white and the nuances are usually spotted too late. By then the shelf, the range or the campaign is already committed.

Instead of guessing what was landing, we asked. We ran six consumer tests across the UK, US, Australia and New Zealand, with hundreds of consumers (more on sample sizes in the 'our testing' section), and quota-controlled so no single group carries a finding on its own. This report is not what shoppers said in the abstract, but what they picked when we put the options in front of them.

Some of it confirms what you'd expect. Some of it doesn't.

Here's all of it.



What's inside

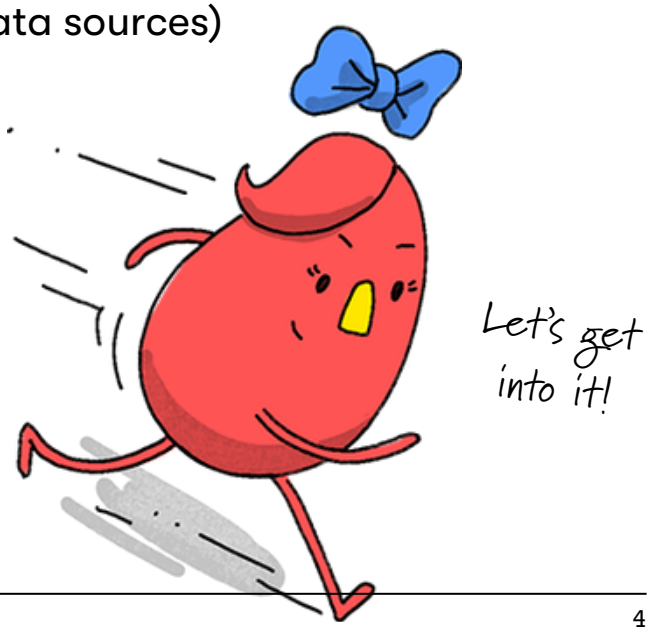
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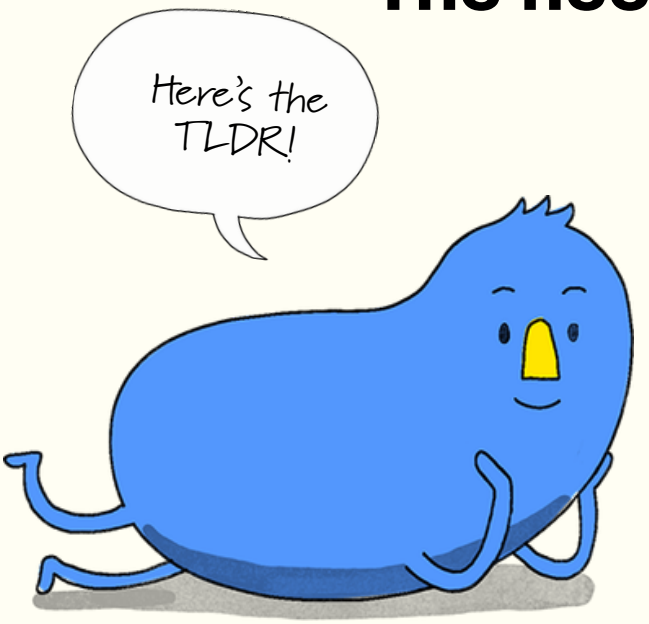
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The need to knows



01

Standalone fibre claims don't cut it, shoppers need to know what it does. When asked which claims would make them most likely to buy a high-fibre product, UK shoppers put a plain "high in fibre" dead last. Claims naming an outcome won instead, "supports gut health" and "keeps you fuller for longer" both performed far better. Shoppers aren't buying fibre, they're buying what it does, so pair the claim with a benefit, or find out if it needs one.

02

'Nutrient dense' might not be doing the job brands think it is. It's become industry shorthand for a GLP-1-friendly meal, and most UK shoppers do understand what it means, but that understanding doesn't change what lands in the basket. Even among those who get it, "high protein" still wins by a wide margin. Test which language actually moves your shopper before leaning on this one.

03

When it comes to treats, premium and value shoppers aren't as different as you'd think. They diverge on the practical stuff, quality for premium buyers, a bargain for value ones, but the emotional motivation lines up almost exactly: both are treating themselves, just with a different justification. Know what kind of permission your shoppers are looking for, quality or value, and speak to that one properly rather than trying to hold both at once.

04

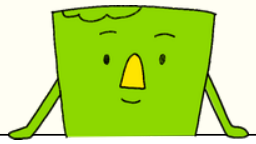
Own label is closing in, but it hasn't won every category. In settled, everyday categories like crisps, it holds even with guests watching. In more personal, on-show categories like hand soap, the brand still wins: own label buyers traded up when guests were coming, and brand buyers didn't trade down. The opening for brands isn't in the categories own label has already won. It's in the ones still being decided.



05

AI shopping doesn't mean brand equity stops mattering, it just has a new job. Shoppers who let AI choose for them still want a name they recognise, not whatever it lands on. Brand's role shifts from catching a shopper's eye on shelf to giving AI a reason to pick you. And younger shoppers are handing that decision over fastest, so the generational gap is what brands need to watch.

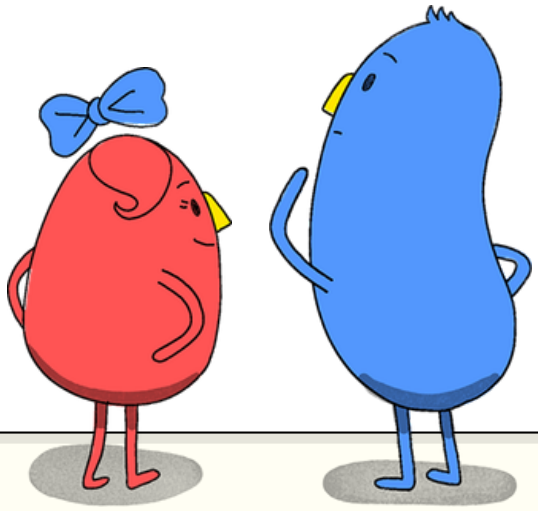
Every trend in this report started as an assumption, testing is what showed the truth.



Fibre needing a plus one, ‘nutrient dense’ understood but not chosen, premium and value chasing the same feeling, own label losing where trust matters most, brand now selling to AI as well as the shopper. None of it was obvious until we asked real shoppers directly.

Reading about a trend tells you it exists. Testing it tells you how it plays out for your brand.

Don’t guess it. Test it!



What people want to eat is changing

The question shoppers ask at the shelf used to be simple: is this good for me? Now it's more specific than that: good for what?

Fibre, protein and the ripple effects of GLP-1 are all trending topics right now that have played a role.

But being a buzzy trend people talk about doesn't always translate to what's chosen at the shelf, so we tested against these trends to understand what shoppers actually pick when it comes down to it.



Fibre: is it the new protein?

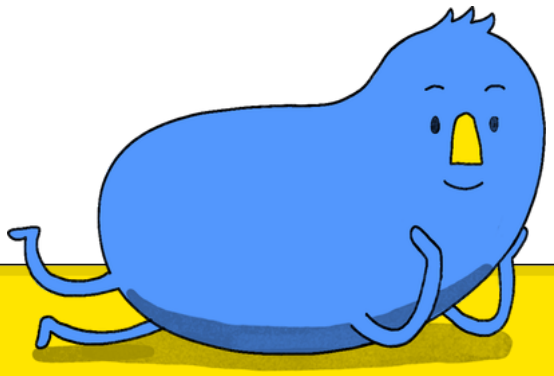
Fibre is having a moment.

Gut health searches are up sharply and #fibremaxxing has passed over 150 million TikTok views (Tatum, 2026). 70% of consumers in the UK say fibre matters to them when choosing food and drink, but only around half feel they're actually getting enough (Stickybeak, 2026).

Breakfast is where that momentum should show up first. It's the category that fibre built. Kellogg's All-Bran has been marketed on digestive health since the 1920s, the 1980s F-Plan diet is credited with lifting UK bran cereal sales by 30%, and wholegrain and high-fibre have been the two most-used health claims on new cereal launches for over a decade (Kellogg's, n.d.) (Ogden, 2012).

So if fibre's moment is real, this is where it should win outright.

We put fibre and protein head to head to find out.



Protein has muscled in on fibre's turf

The context: If fibre claims still own breakfast, a plain 'added fibre' pack should beat an 'added protein' pack outright. This is the one occasion fibre shouldn't have to share. We tested that by showing consumers the same muesli pack in two versions, one "with added fibre," one "with added protein," and ran the same comparison on snack bars, across the UK, US, Australia and New Zealand.

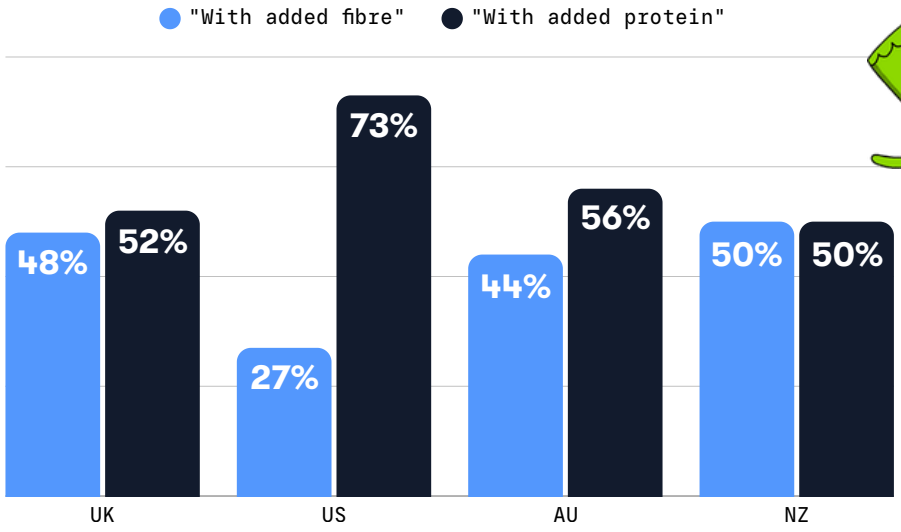
The stats: The result was a near-dead heat in the UK: 48% chose fibre, 52% chose protein. A similar split was true for New Zealand and Australia. The US landed completely differently: protein led the choice by a significant margin in both muesli and snack bars.

Which of these breakfast muesli products would you be most likely to buy?

n=816







What this means

Nobody would blink if protein won a post-workout drink. Breakfast is different, it's the one place an "added fibre" claim has sat unchallenged for decades. A 50/50 split here, or a clear protein win in the US, isn't fibre losing new ground, it's protein encroaching on the one occasion fibre should own outright. That's a much bigger tell about how far protein's momentum has actually travelled.

If you're a cereal or breakfast brand still leaning on a standalone fibre claim, don't assume it still holds all the ground. Test a protein-forward or combined claim before a competing brand beats you to it.



Where protein belongs, it wins hands down

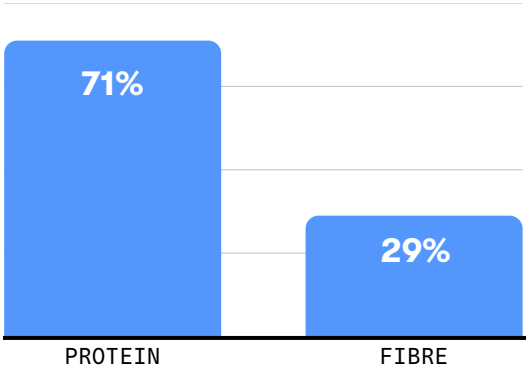
The context: If protein really owns post-workout the way decades of sports nutrition marketing suggest, a high-protein recovery drink should beat a high-fibre one outright, no contest. We tested that by showing UK consumers a high-fibre post-workout drink against a high-protein one, and repeated it in every other market.

The stats: UK consumers chose protein 71% to 29%, and every other market we tested returned the same lopsided result.

Which of these post-workout beverages would you be most likely to buy?

UK, n=204





AS ONE UK SHOPPER SUMMED IT UP:

If I was working out then protein would be more beneficial to me than fibre.

What this means

This is what a clear preference looks like. Protein choosers for the post-workout drink knew exactly why they were picking it, talking about needing "extra protein" for lifting weights.

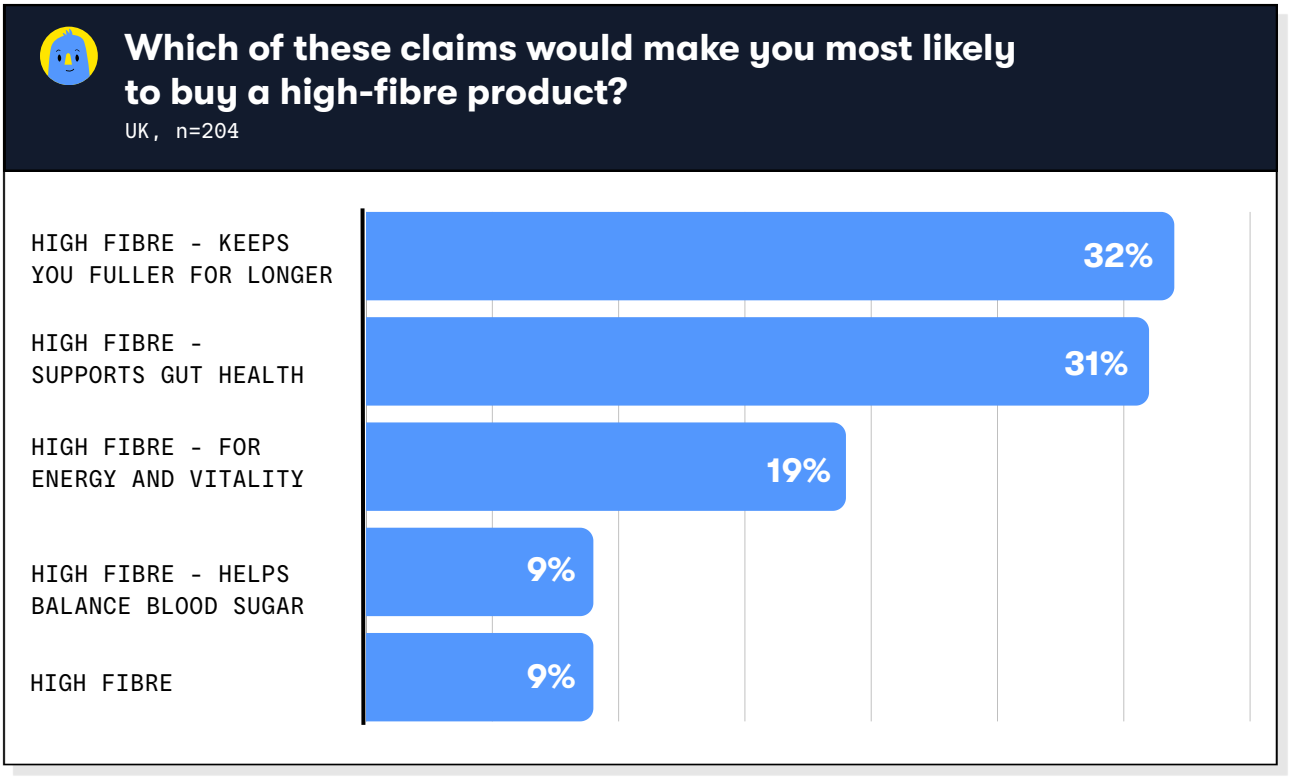
Even the fibre choosers didn't argue the point: one explained they'd "preferred it as digestive health rather than recovery," picking their own occasion rather than contesting protein's. Nobody was in any doubt whose occasion this was. Breakfast, by contrast, is a category split down the middle.



Fibre can win, as long as it brings a plus one

The context: If shoppers really do fill in the blank themselves, knowing why fibre matters and what it'll do for them, a plain "high in fibre" claim should hold its own against claims that spell out a benefit. We tested that by asking UK consumers which of five claims would make them most likely to buy a high-fibre product.

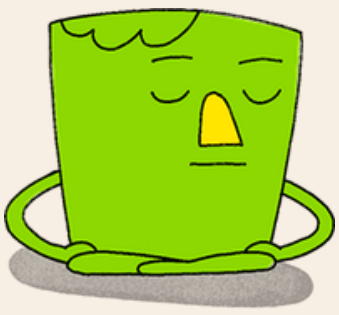
The stats: UK consumers put a plain "high in fibre" dead last, on just 9%. The claims that named an outcome came out top: "supports gut health" and "keeps you fuller for longer" each took around a third of the vote, more than three times the standalone claim.



What this means

Shoppers aren't buying fibre, they're buying what fibre does for them. One UK shopper explained her choice simply: "to fill me up more." This puts the last two findings in a different light. Protein wins for the same reason, shoppers just already know what protein does for them. Nobody needs "25g protein" explained. Fibre isn't there yet, so the benefit has to be spelled out loud and clear.

Fibre alone doesn't need more awareness. It needs the benefits spelled out. If fibre's anywhere on your pack right now, don't assume the claim's landing. Ask shoppers directly whether they know what it's actually doing for them.



Fibre isn’t yet the new protein, and breakfast is the proof.

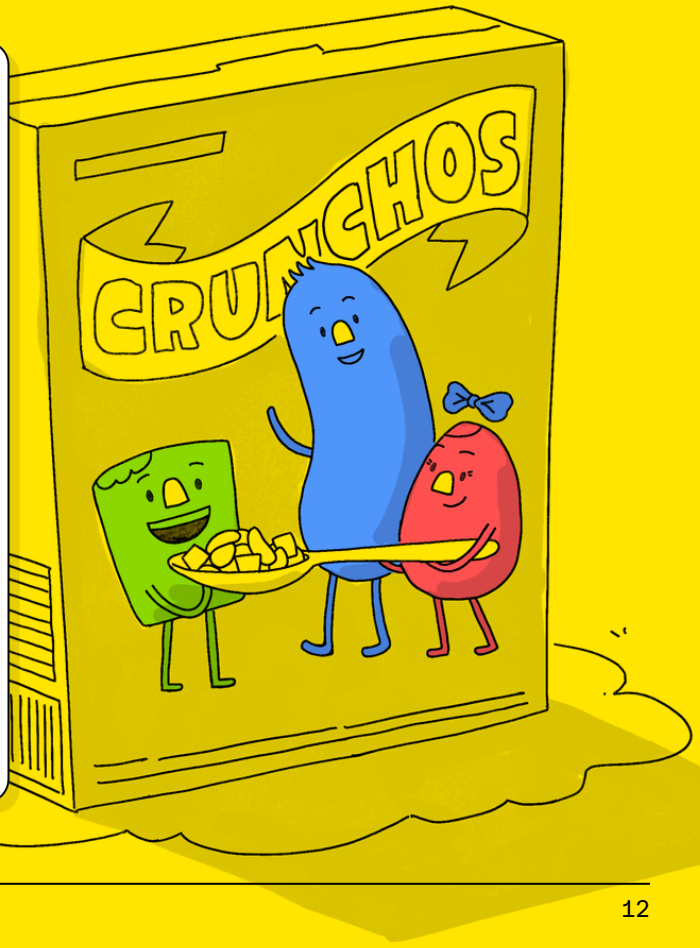
Fibre matters to consumers, and cultural interest in it is real and growing, but our tests show that protein’s momentum has been strong enough to make even fibre’s founding category a genuine contest.

That’s not to say shoppers have to choose, fibre and protein do different jobs, and our diets need both. Is protein about to claim breakfast the way it’s claimed everything else, or does fibre just need its own ‘and so what’ to close the gap?

How to apply this to your brand

A standalone fibre claim is the weakest thing you can put on pack. Benefit-led claims won by more than three to one. If fibre’s anywhere on yours, don’t assume it’s landing.

Test a benefit-led or combined claim before you bet on it at scale.



GLP-1s: are they changing how we think about food?

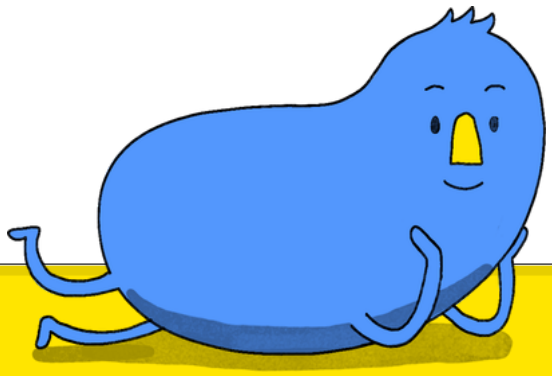
GLP-1 use isn't niche anymore.

11% of UK adults are currently taking it, up from 8% a year ago, and that's before the pill format launched in July 2026, which some estimates suggest could more than double UK uptake over the next year (Statista, 2026) (PwC UK, 2026).

People on GLP-1s are already reshaping their whole basket: only 3% report no change to what they buy, against 30% of those not taking it, and they over-index on smaller-portion meals, protein and premium food (Statista, 2026).

What's less clear is whether that shift stays confined to the people taking GLP-1s, or is it starting to change what everyone else buys too.

So we tested it!



The ripple is real: it's not just the people on GLP-1s who are changing what they buy

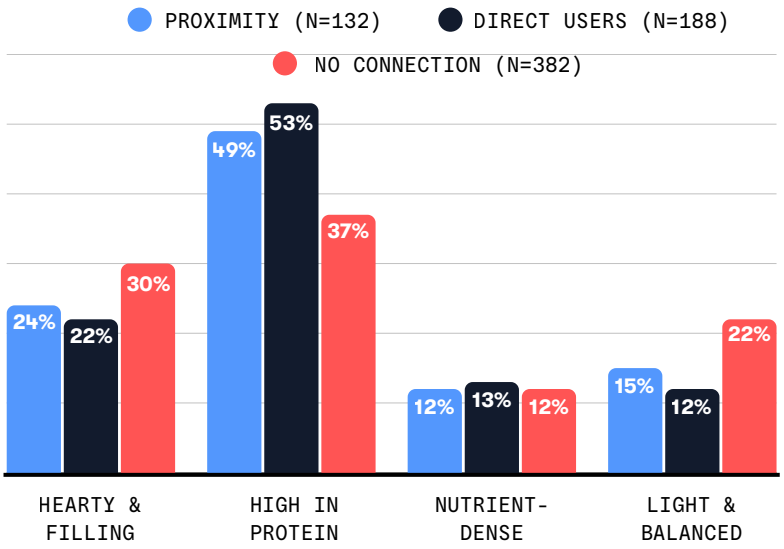
The context: If the ripple from GLP-1 is real, it should reach beyond direct users, to the people who are associated with them. Most research only splits one way: users versus everyone else. We tested it by splitting consumers from four markets into three groups, no connection to GLP-1 medications, close proximity to a GLP-1 user, and direct users, then compared their choice against four ready meal claims side by side.

The stats: In a straight choice between a "hearty and filling" ready-meal and a "high protein" one, the no-connection to GLP-1 group chose protein 37% of the time. The proximity group chose protein 49% of the time, and direct GLP-1 users chose protein 53%, not meaningfully different from the proximity group. We dug a little deeper and found the closer people are to GLP-1 use, the more likely they are to agree it's changing how everyone eats, not just the people on it: 5% of the no-connection group, 21% of the proximity group, and 45% of direct users. This indicates that being close to a GLP-1 user may influence the proximity group more than they actually think.

Which of these ready-meals would you rather buy?

UK, US, AU & NZ, n=702 of 816 tested





Note: Groups are mutually exclusive by priority (direct, then proximity, then no connection), so they won't sum to the full sample size. The gap in high-protein choice between the no-connection group and both proximity and direct users is statistically significant. Proximity and direct users aren't statistically different from each other. This suggests even just having GLP-1s in your orbit can influence the way you purchase.

What this means

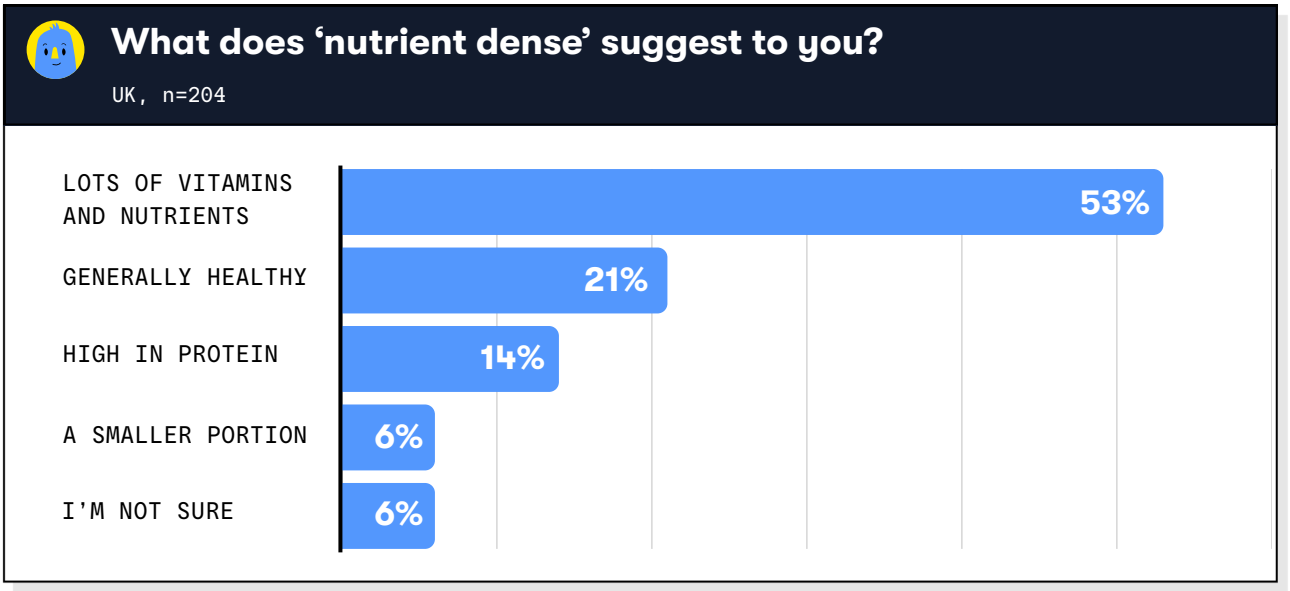


You don't need to be on a GLP-1 yourself for it to shape what you eat. Living with, or being close to, someone who is seems to be almost enough on its own. Proximity and direct users are drawn to the same claims and both are clearly different from people with no connection to GLP-1s at all.

Understanding ‘nutrient dense’ doesn’t make people want it

The context: ‘Nutrient dense’ is the term brands and retailers keep reaching for as their answer to the GLP-1 shift, on the assumption that if shoppers understand it properly, they’ll choose it. So instead of just asking shoppers to pick between the four claims on a ready meal, we also asked what ‘nutrient dense’ actually means to them, then checked whether the people who understood it correctly were any more likely to pick it.

The stats: UK shoppers get it right for the most part: 53% say ‘nutrient dense’ means “lots of vitamins and nutrients,” and another 21% say “generally healthy,” (a reasonable read on a slightly vague term). Just 6% think it means a smaller portion, and 6% aren’t sure. But understanding doesn’t translate into choosing it. Among the 3 in 4 UK shoppers who understand ‘nutrient dense’ correctly, “high protein” still wins by nearly four to one: 40% choose ‘high protein’ against just 11% for ‘nutrient dense’, almost identical to the result across the UK sample as a whole, where “high protein” comes first at 42% and “nutrient dense” trails last on 11%, behind even “light and balanced.” Every other market tested returned the same order.

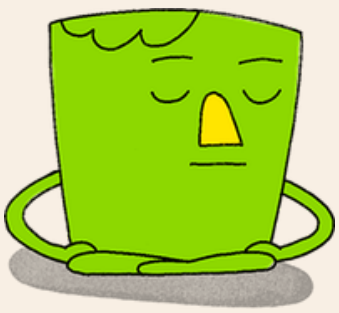


What this means



This isn’t a comprehension problem. Most UK shoppers know broadly what ‘nutrient dense’ is supposed to mean, and knowing that still doesn’t make them want to buy it. Protein wins because it promises something specific and desirable: more protein, more fullness, a result you can picture. “Nutrient dense” promises broad, vague wellness, technically accurate, but nothing a shopper can picture eating.

For any brand hoping to reach shoppers shifting their choices because of GLP-1s (and not just the direct users), that’s the real lesson: test your claims with them, or risk missing the mark entirely.



GLP-1s are changing how we eat, and the ripple already reaches further than just the people taking them.

The ripple beyond direct users looks real, you don't need to be taking a GLP-1 medication yourself for it to shape what's in your basket.

What hasn't caught up is the language brands are reaching for to meet that shift. Shoppers broadly understand what 'nutrient dense' means, so that's not the problem, the problem is that it doesn't promise them anything they actually want.

Protein does, which is exactly why it's winning.
Whether nutrient dense ever becomes a claim that moves people, or stays one that's technically accurate and commercially flat, is worth testing before any brand bets a launch on it.

How to apply this to your brand

The GLP-1 effect reaches well beyond the people on the drug: proximity moves the basket too. And "nutrient dense" is understood but still not chosen.

Test the claim, not comprehension, before you build a launch on it.



How people choose to spend is changing

When money's tight, the assumption is that shoppers ask one question: can I afford this?

In reality, it's more specific: can I justify this purchase? And there's a lot riding on the word justify. You may have heard of 'treatonomics', and watched premium own label creep further up the shelf, two shifts we hear are reshaping how people spend. We tested whether that's actually true, and where the nuance sits.

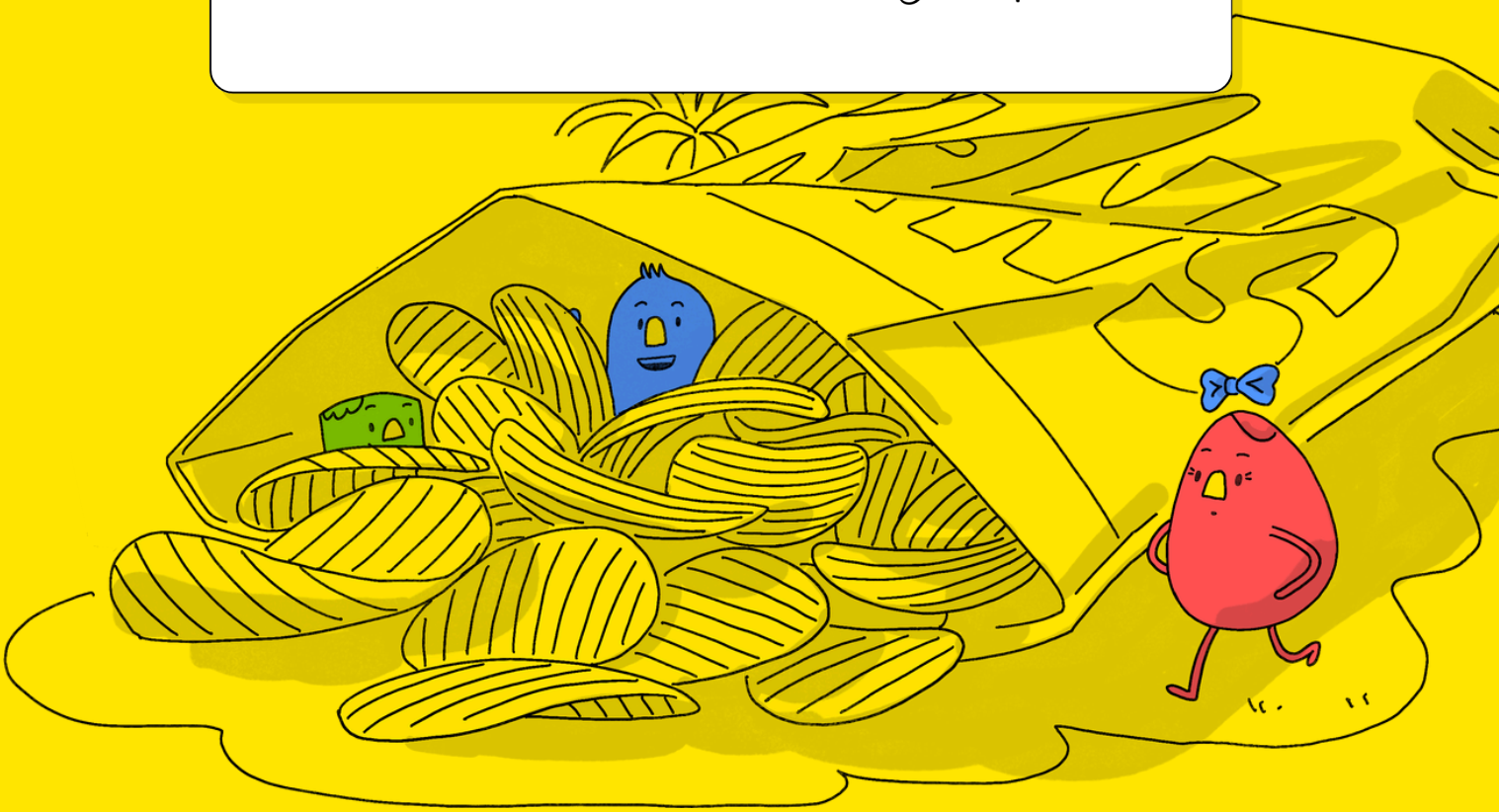


Treatonomics: what does a treat look like when money is tight?

Treatonomics describes a very human response to money being tight (you may remember the 'lipstick effect', same idea): keep buying the small, affordable luxuries, because they lift your mood when everything else feels uncertain.

Of consumers we tested in the UK, 47% said their financial situation feels more stretched than a year ago. The easy assumption is that indulgences are the first thing to go, but treatonomics suggests otherwise: the treat is still there, it has just relocated.

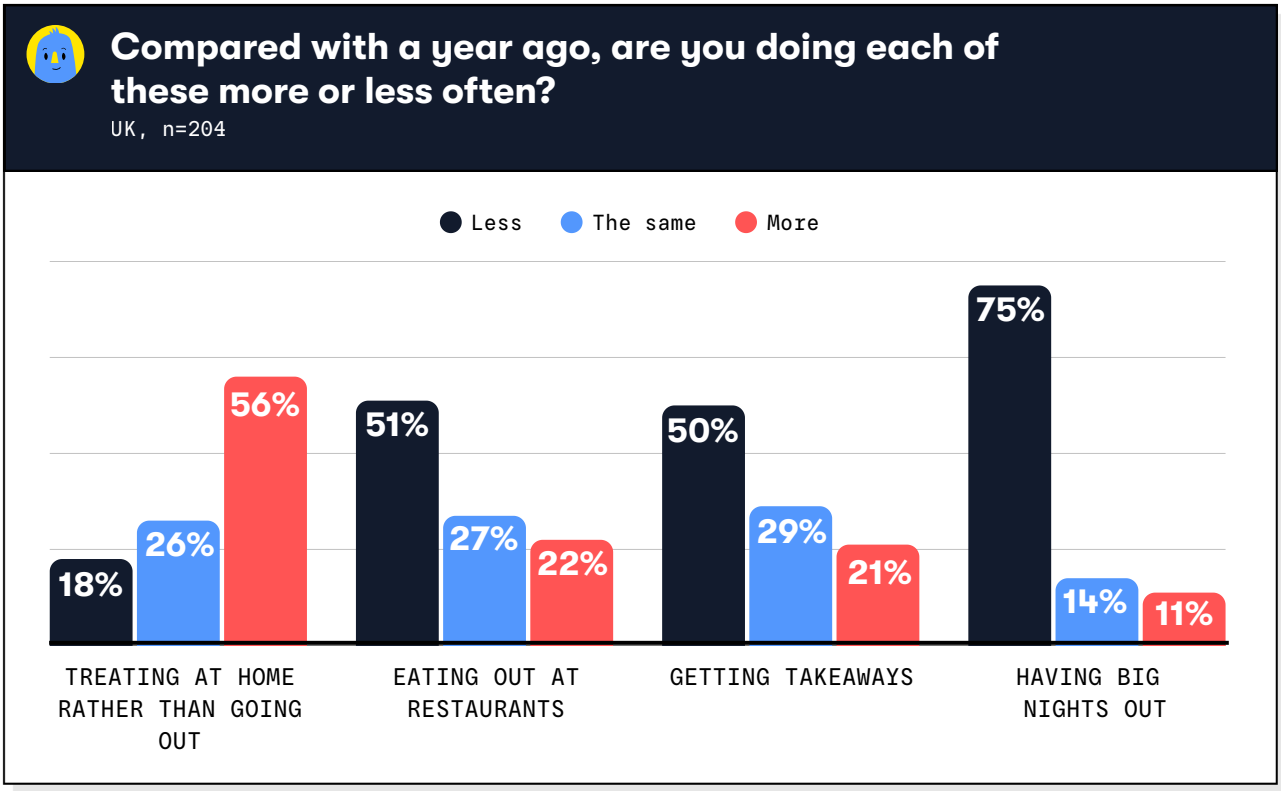
What's really changed is the story consumers tell themselves to justify it.



Treating didn't stop, it just moved home

The context: If tightening budgets really do put a stop to treating, we'd expect it to fall away everywhere, at home and out alike. We tested that by asking consumers across the UK, US, Australia and New Zealand whether they're treating themselves more or less often, both at home and out of home, compared to a year ago and cutting the results by how financially stretched people say they feel.

The stats: At-home treating is up. 56% of UK respondents say they treat themselves at home rather than going out more often, compared to a year ago. Every out-of-home occasion runs the other way: 75% report fewer big nights out, 51% less eating out, 50% fewer takeaways, and the same pattern repeats in every other market tested. Looking at the consumers across all four markets who say their finances feel more stretched, the at-home treat is the one thing still standing: 61% say they treat themselves more at home now than a year ago, and within that group, just as many are trading up to nicer, more premium options (23%) as are trading down to cheaper ones (23%).



What this means

Financial pressure is not switching the treat off. It is redirecting where it happens. The people who feel the squeeze most are still buying the small thing, they are just buying it for the sofa instead of the restaurant, and this group is split: trading up is as common a response to that pressure as trading down.



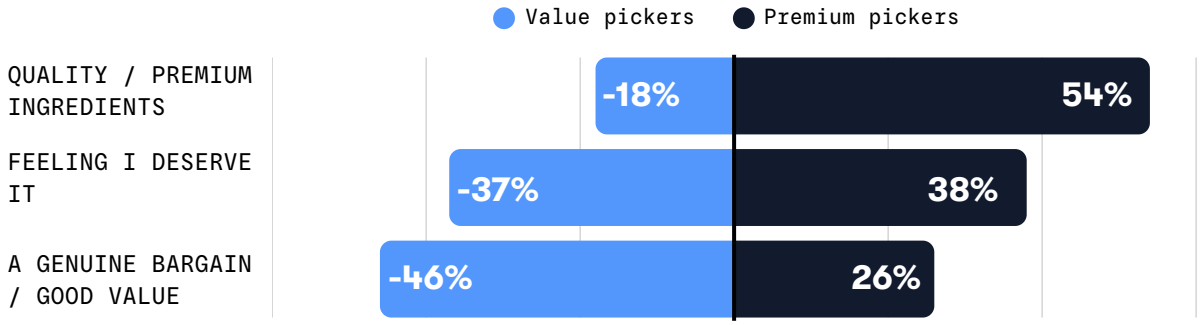
“Premium” and “value” treat shoppers aren’t as different as they look

The context: If premium and value treat-shoppers really are after different things, we’d expect them to reach for different products and explain themselves in different terms. We tested that by giving UK consumers a straight choice between a small bar of premium chocolate and a large bar of standard chocolate at the same price, then asking what makes a treat feel worth it to them.

The stats: UK consumers split fairly evenly, with a slight directional lean towards the value bar. The far bigger signal sits in why: asked what makes a treat feel worth it, premium pickers put quality ingredients top (54%, against 18% of value pickers), while value pickers put a genuine bargain top (46%, against 26%), gaps that are statistically significant. The vocabulary tracks these trends exactly: “quality over quantity”, “a little luxury” on one side, “more for your money”, “all chocolate tastes the same” on the other. But sitting just behind each group’s top reason is the one driver that doesn’t move at all: “feeling I deserve it”, chosen by 38% of premium pickers and 37% of value pickers when asked what makes any treat worth it.

What makes a treat feel worth it? Premium vs value pickers

UK, n=204



Note: we know these sub-groups are relatively small (n=96 premium pickers and n=108 value pickers), but the gaps are big enough to hold up, even at this size, and the same pattern shows up again once you look across all four markets.

What this means

Both groups are chasing the same underlying payoff and reaching for opposite proof to make it feel earned. One route is quality as permission, the other is value as permission, and the deserving sits behind both at exactly the same level. **Know what permission your shoppers want and speak to that one properly.**



Treatonomics is real: it's less about cutting back and more about finding a new way to keep saying yes.

Money gets tighter and the treat doesn't disappear, people just change where they buy it or what they tell themselves to justify it, and that held true across the UK, US, Australia and New Zealand. Sometimes that means moving it from the pub to the sofa.

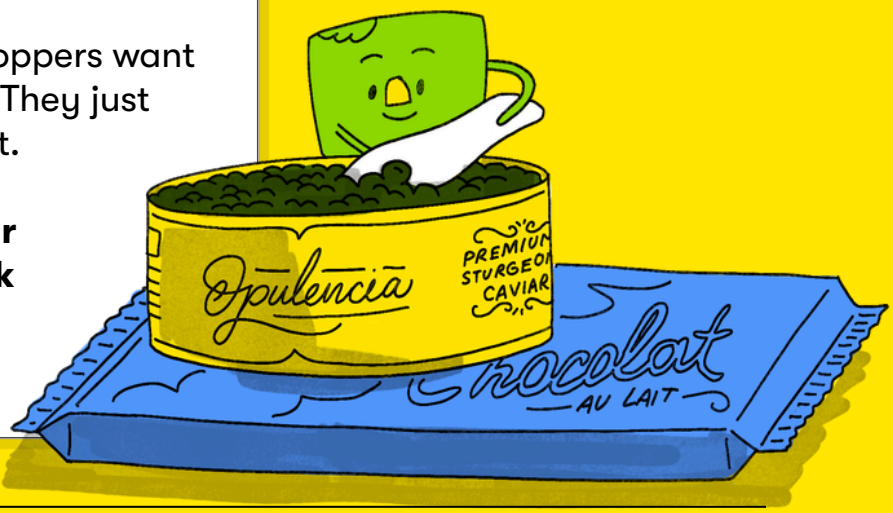
Sometimes it means picking the small bar because it's "quality," or the big bar because it's "good value." Different tactics, same outcome: a small purchase people can still feel good about.

That's the real thing to watch here, not which specific trade-off wins this year, but the fact that shoppers will keep finding one, squeeze or no squeeze.

How to apply this to your brand

Premium and value treat shoppers want the same thing: permission. They just reach for opposite proof of it.

Test which permission your shoppers want, then speak to that one properly.



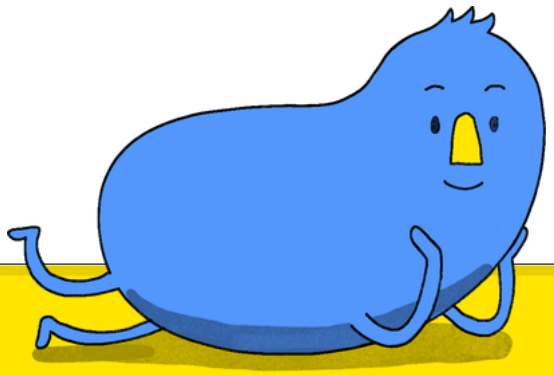
Own label: does it still win when someone's watching?

Own label now makes up over 50% of UK grocery sales volume, and it's growing at the top rather than the bottom (The Grocer, 2026).

Tesco's Finest and Sainsbury's Taste the Difference turn over more than £2bn each (J Sainsbury plc, 2026) (Tesco plc, 2024), and retailers have opened a tier above premium: Asda's Exceptional, Sainsbury's Discovery, Tesco's Finest Chef's Collection.

Shoppers are happy with it, too: among UK shoppers who already buy own label, 95% rate the quality as the same as or better than the brands (New Zealand Trade and Enterprise, 2025). What nobody's tested is whether that confidence survives an audience.

Filling your own cupboard is one thing, putting it out where guests can see it is another, so we ran the same choice twice with the same shoppers: once for themselves, once for company.



Guests don't change a mind that's already made up

The context: If own label only wins because nobody's looking, putting the choice in front of guests should knock it straight back down. We tested that by asking consumers to choose between Kettle Salted crisps at £1.49 and Tesco's Finest Lightly Sea Salted at £1.50, once for everyday snacking and once for friends coming round.

The stats: For everyday snacking, 52% chose Finest. For friends coming round, it was an even split. Follow the same shoppers between the two questions and there's movement on both sides: 19% of everyday Finest buyers switched to Kettle for guests, and 15% of Kettle buyers switched to Finest. It happens both ways in similar numbers, so it cancels out and the overall split barely moves.

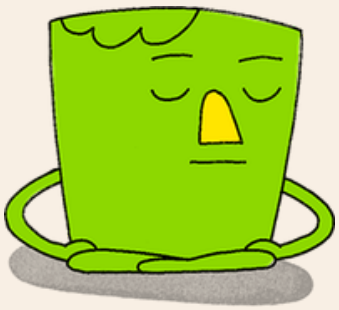
> "I really like these crisps and think they are just as good quality as other brands."



What this means

This isn't shoppers picking own label only when there's nobody around to judge them for it. They make the same call in their own cupboard as they do on the coffee table.

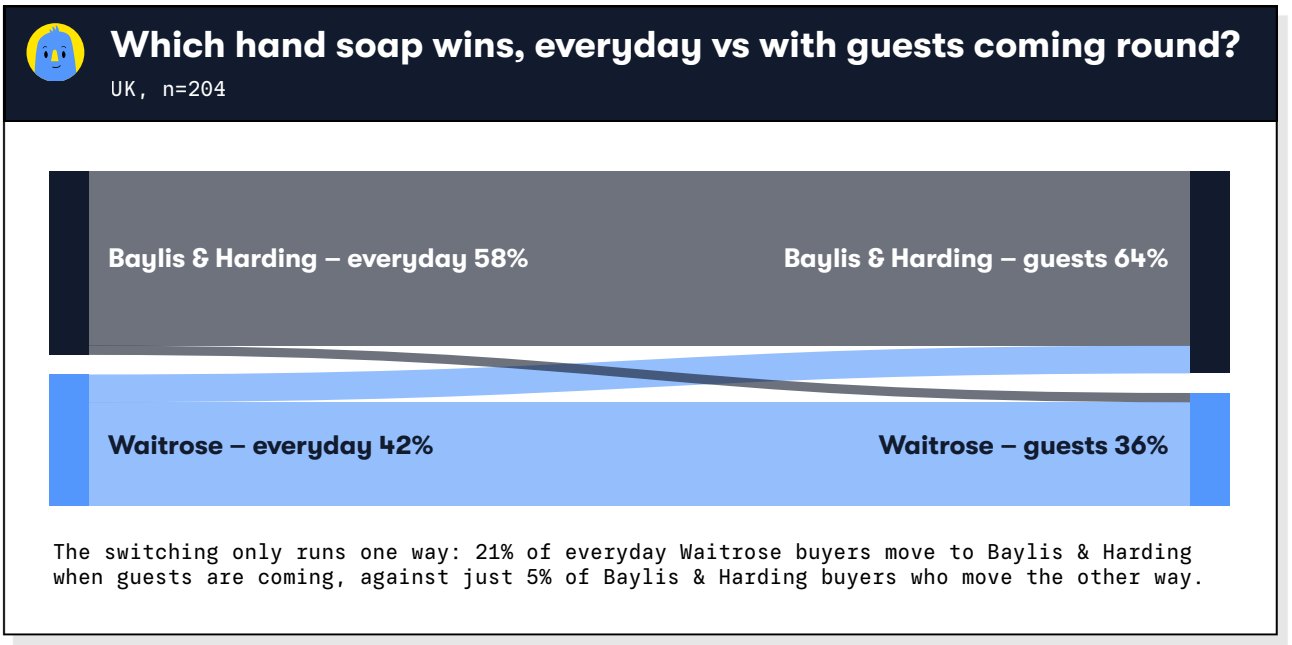
So don't try to win this one back by positioning your brand as the one you bring out for company. Shoppers already believe own label is just as good, and they're happy to prove it in front of people.



But not every category is settled

The context: Crisps get eaten in one sitting and the bag's forgotten by the end of the night. A hand soap bottle sits out for weeks, handled by every guest who washes their hands. Something about that changes the calculation, whether it's the visibility, the price gap, or the fact that personal care just feels more personal, the audience effect that disappeared on crisps came back on soap. We tested that by comparing Baylis & Harding at £2.55 against Waitrose own label at £2.10, once for everyday use and once with guests in the house.

The stats: When we put the hand soaps to the test, Baylis & Harding led 58% to 42% for everyday use, widening to 64/36 once guests were in the house. Behind those overall numbers, the movement only goes one way: 21% of those who chose the own label hand soap for themselves switched to the brand when guests were coming, against just 5% of brand buyers who switched to own label, a statistically significant shift in one direction only, not two groups swapping past each other.



What this means

Having guests over doesn't make shoppers switch out of nowhere, they tip a choice that was already close. Whatever's driving it, visibility, price, or hand soap just feeling more personal, a real slice of own label buyers reach for the trusted brand the moment they know someone else will be watching, even though they'll tell you in the same breath that premium own label is just as good.

"My guests don't expect me to be posh," said one shopper who stuck with own label regardless (female, 55+). But she's the exception: most of her fellow everyday own label buyers make the opposite call once guests are actually in the house.



Own label holds up when someone's watching, but not evenly.

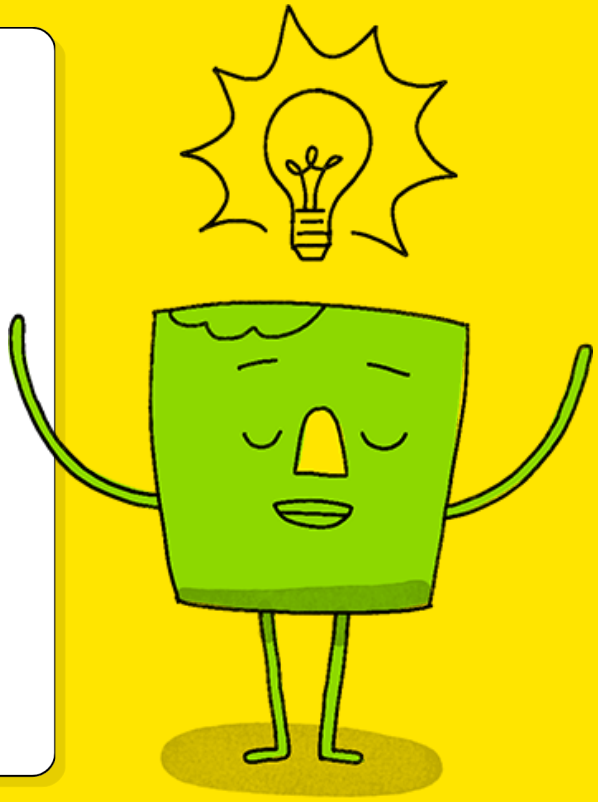
In categories that are already settled, like crisps in our test, own label's win is the real thing: durable, and immune to an audience. In categories that are more personal, or still being decided, like hand soap, the brand remains the safer bet in company, and it's own label buyers making that switch, not the other way round.

If you're a brand watching own label eat your share, the opening isn't in the categories it has already won. It's in the ones still being decided, where being seen, and being personal, still counts for something.

How to apply this to your brand

Own label holds where the category's settled, and slips where it's personal or still being decided. The opening for brands isn't in the categories own label has already won, it's in the ones still being fought over.

Test where being seen still counts before you concede the shelf.



How people discover and buy is changing

The past few decades have been one long sprint of digital innovation, each wave changing how people shop faster than you can say "add to basket."

E-commerce, mobile, social media, every one of them felt huge at the time, and every one of them left a bunch of brands and retailers playing catch-up. AI is the next wave, and it's already reshaping purchase behaviour in ways we're only starting to understand.

But we wanted to know: how do consumers actually feel about the new tools at their fingertips, and how much does that differ across purchase choices and demographics? So we went straight to consumers to find out where they sit right now.



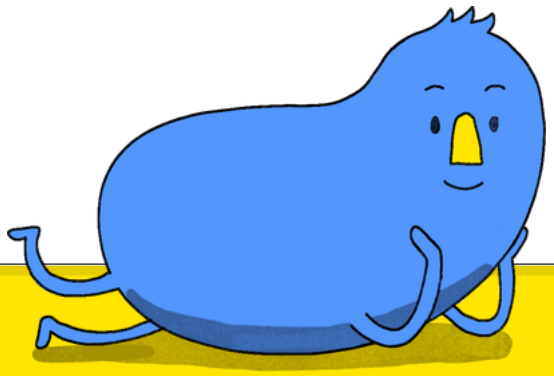
AI commerce: what happens when AI becomes the shopper?

AI is already helping us shop, it just isn't doing the buying. Yet.

Nearly half of UK shoppers say they use AI somewhere in their shopping journey, and 35% have already bought something it recommended (Statista, 2026). But it's still stuck doing the research, comparing, shortlisting, deciding, not buying. Only 1 in 5 would let it make the final call for them (Statista, 2026). That's about to change. ChatGPT has a buy button, Google's building one into Gemini, and grocery is the category shoppers say they'd hand over first.

So when the shopper isn't the one choosing, what happens to brand loyalty?

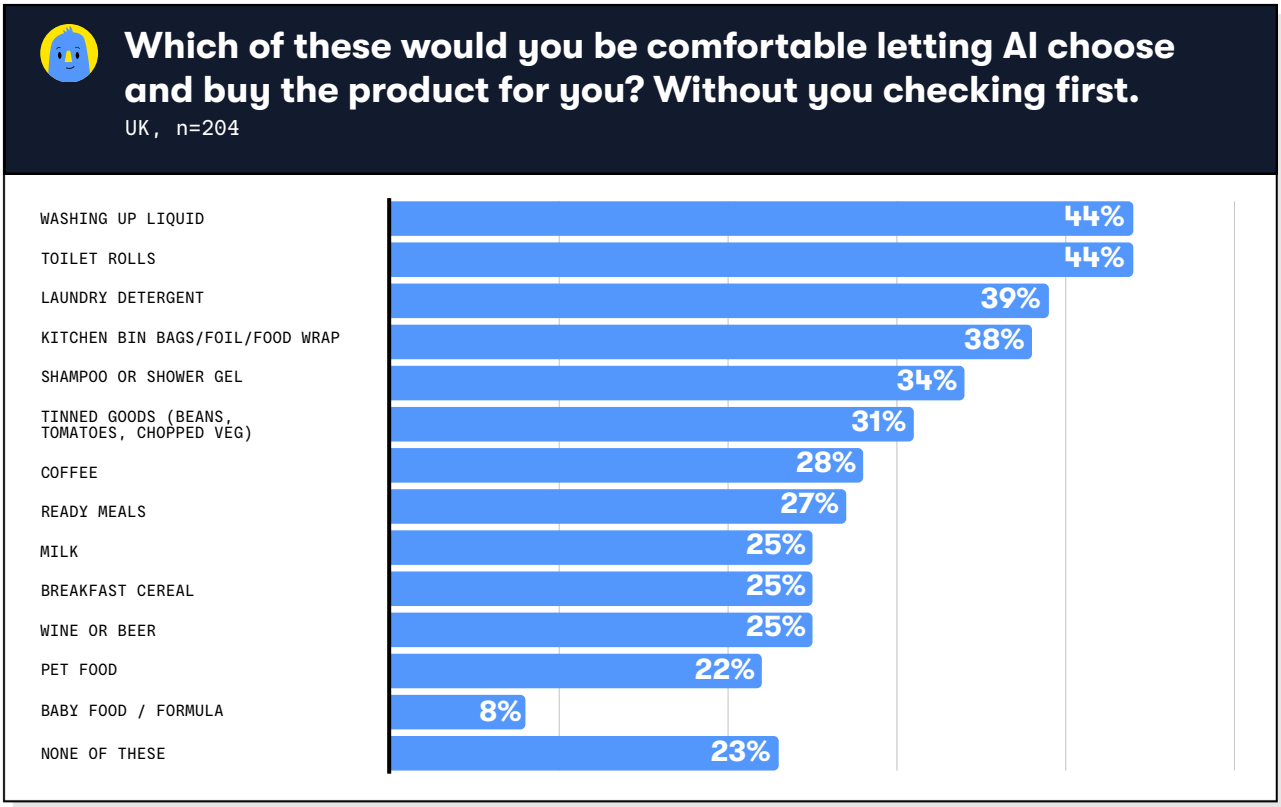
We asked grocery shoppers across the UK, US, Australia and New Zealand.



Some categories feel too personal to hand over to a robot

The context: We gave shoppers a list of grocery categories and asked which ones they'd let AI choose and buy without checking first. The obvious assumption is convenience: shoppers would hand over the categories that are the biggest hassle to shop for, and keep control of the ones they actually care about choosing themselves.

The stats: Among UK shoppers, washing-up liquid and toilet rolls top the list, both at 44%, followed by laundry detergent (39%), bin bags and food wrap (38%) and shampoo or shower gel (34%). Right at the other end sit baby food and formula on just 8%, some way behind pet food (22%) and wine or beer (25%), a gap between top and bottom that's statistically significant. The same basic split, hassle categories high, personal or safety categories low, holds in every market tested, even as the exact category on top shifts around: laundry detergent leads in the US and New Zealand and comes out on top once you average across all four markets, while Australia puts toilet rolls first.



What this means

The categories shoppers hold onto are the ones that feel personal or tied to safety. One person said baby food "should not be selected by a robot," reflecting a lack of trust in AI to choose a product that's safe for children.

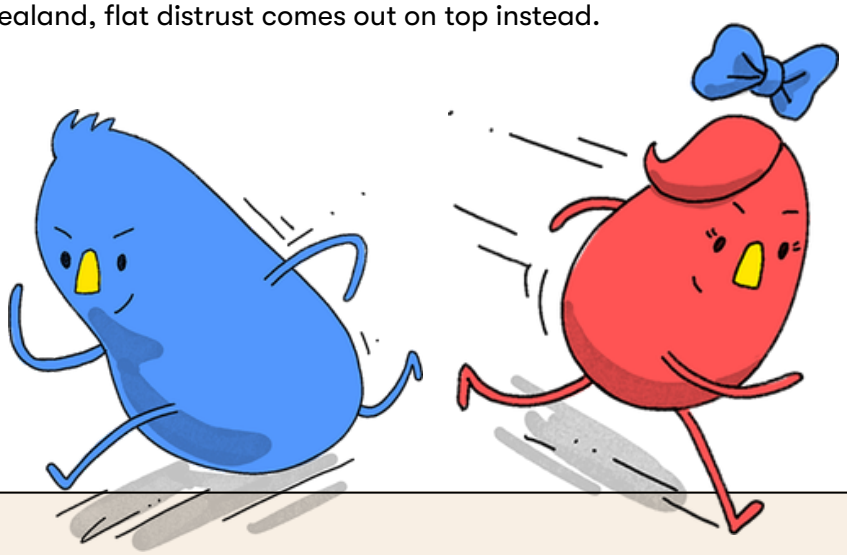
Another said "AI doesn't know what I like" about buying wine. Effort isn't the dividing line. Trust and personal preference are.



AI doesn't replace brand trust, it runs on it

The context: So for the categories shoppers are willing to hand over, does that mean they're happy for AI to find them the cheapest deal, even from a brand they've never heard of? We asked shoppers what they'd actually want AI to pick, and how much control they'd give it.

The stats: Asked to choose between a known, trusted brand and a cheaper unknown one AI vouched for, UK shoppers picked the familiar brand 57% of the time against 43% for the AI's cheaper pick, a real preference for familiarity over price. UK shoppers are also a bit more open than most when it comes to what would actually build that trust: 24% say a clear explanation for the choice would win them over, their top answer, with 19% pointing to reviews or ratings and another 19% saying they simply wouldn't trust an AI's pick no matter what. Every other market tells a different story, in the US, Australia and New Zealand, flat distrust comes out on top instead.

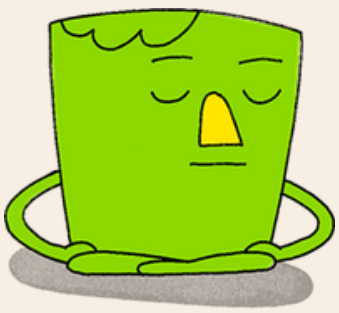


What this means

For AI shopping to actually work for people, three things have to line up: they need to recognise the brand, understand why it was picked for them, and see that other shoppers rate it too. Brand still does the heavy lifting, even when AI is doing the choosing. UK shoppers do look slightly more persuadable on the AI front than shoppers in the other markets we tested, they're not starting from distrust, they're starting from "convince me."

That's good news for strong brands and the marketers behind them: consumers aren't handing over total control to AI, they still have standards and expectations, and if AI fails to meet them, that trust disappears fast.

Brand value doesn't stop mattering once AI enters the picture, it just gets used differently: less "which one catches my eye on shelf," more "which one gives AI a reason to pick it for me."

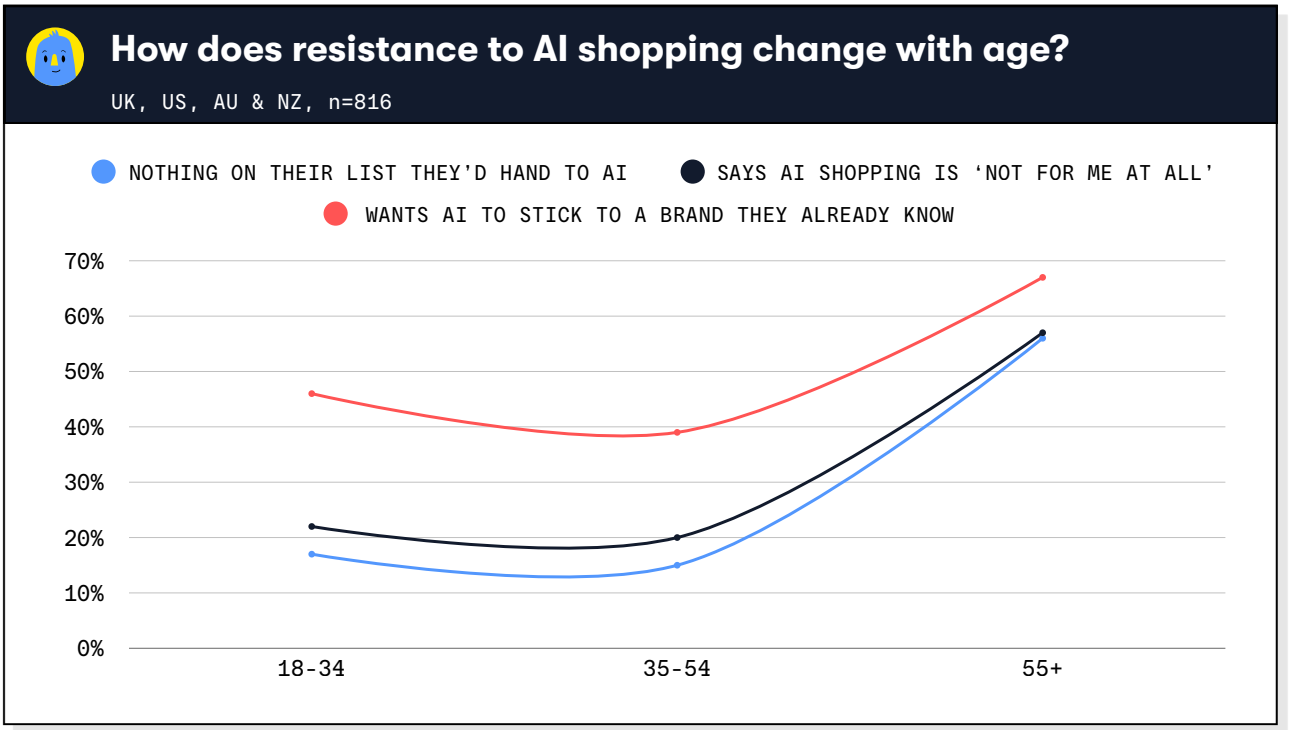


The real, lasting divide might be age, not category

The context: So far, the split looks like it's all about category: some purchases shoppers happily hand over, others they keep for themselves. But we thought category might not be the whole story, so we cut the same data by age.

The stats: This is based on the full sample across the UK, US, Australia and New Zealand combined, rather than the UK alone, since splitting by age needs a bigger base to hold up. Directionally, it looks like there's consistency across markets. Resistance to AI shopping doesn't build steadily with age, it holds fairly flat and then jumps sharply at 55+.

Only 17% of 18-34s say there's nothing on the list they'd hand to AI, barely different from 22% of 35-54s, but that jumps to 46% among the 55+ group. Sentiment follows the same shape: 15% of 18-34s and 20% of 35-54s call AI shopping "not for me at all," against 39% of the 55+ group. Brand loyalty tells a similar story, 56% of 18-34s and 57% of 35-54s want AI to stick to a brand they already know, rising to 67% at 55+.



What this means

The line isn't drawn on a shelf, it's drawn across a generation. Younger shoppers are simply far more open to letting AI handle their shopping, while a large share of the 55+ group opts out of the idea altogether, and holds even tighter to familiar brands when they don't.

That makes today's category rankings a snapshot of one generational moment, not a fixed rule about what AI can and can't be trusted with forever.



AI's impact on shopping is real: it's already reshaping the shortlist, just not the final click.

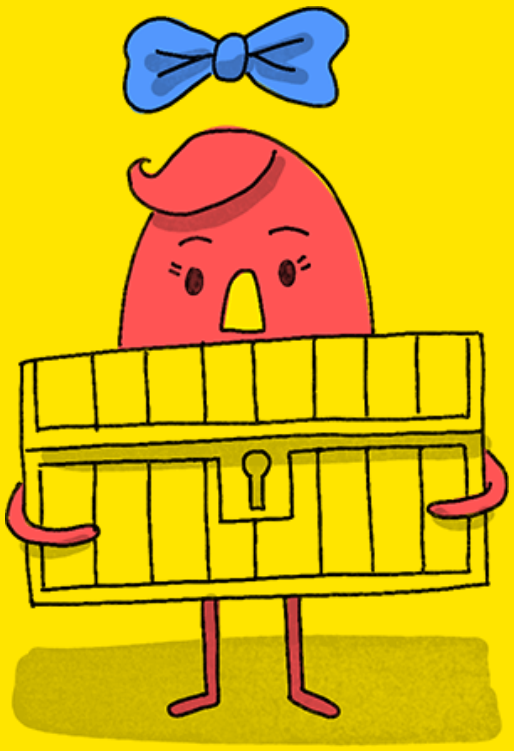
There's a genuine gradient of trust across categories, a preference for familiar brands that survives even when AI is involved, and an age divide that may end up mattering more than category ever did. Consumers are using AI to shortlist, not to buy, and even where they do hand over control, they aren't asking it to trade them down.

So the pressure point for brands isn't price, it's whether AI can justify picking them, a different job to simply being the name a shopper recognises on shelf.

How to apply this to your brand

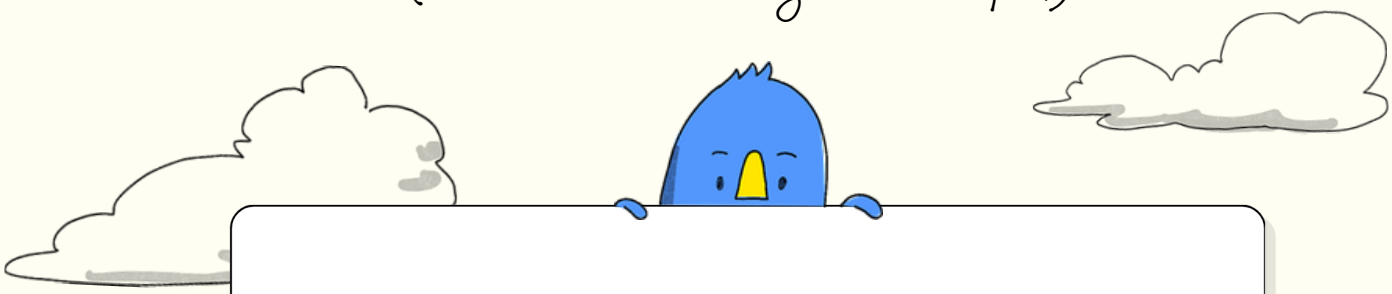
AI is shortlisting, it's not buying yet, and brand still does the heavy lifting. The new job is giving AI a reason to pick you.

Test whether your brand gives it one, before AI starts making the call.



Fine, we'll wrap up

(but we were having so much fun!)

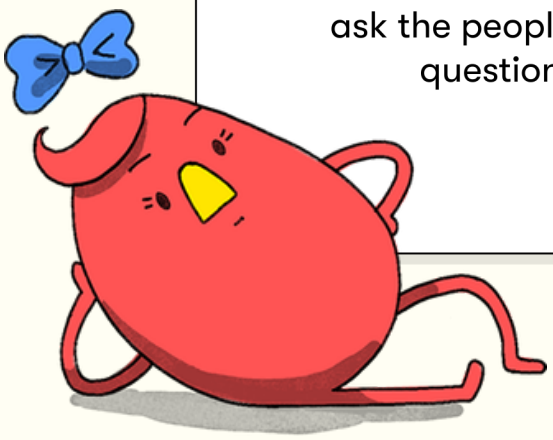


Fibre, the impact of GLP-1s, treats, own label and AI shopping. Five stories that look separate on the surface.

Underneath, they're about the same shift: shoppers are quietly changing their minds about what's worth buying, what's worth paying extra for, and how they land on a decision in the first place.

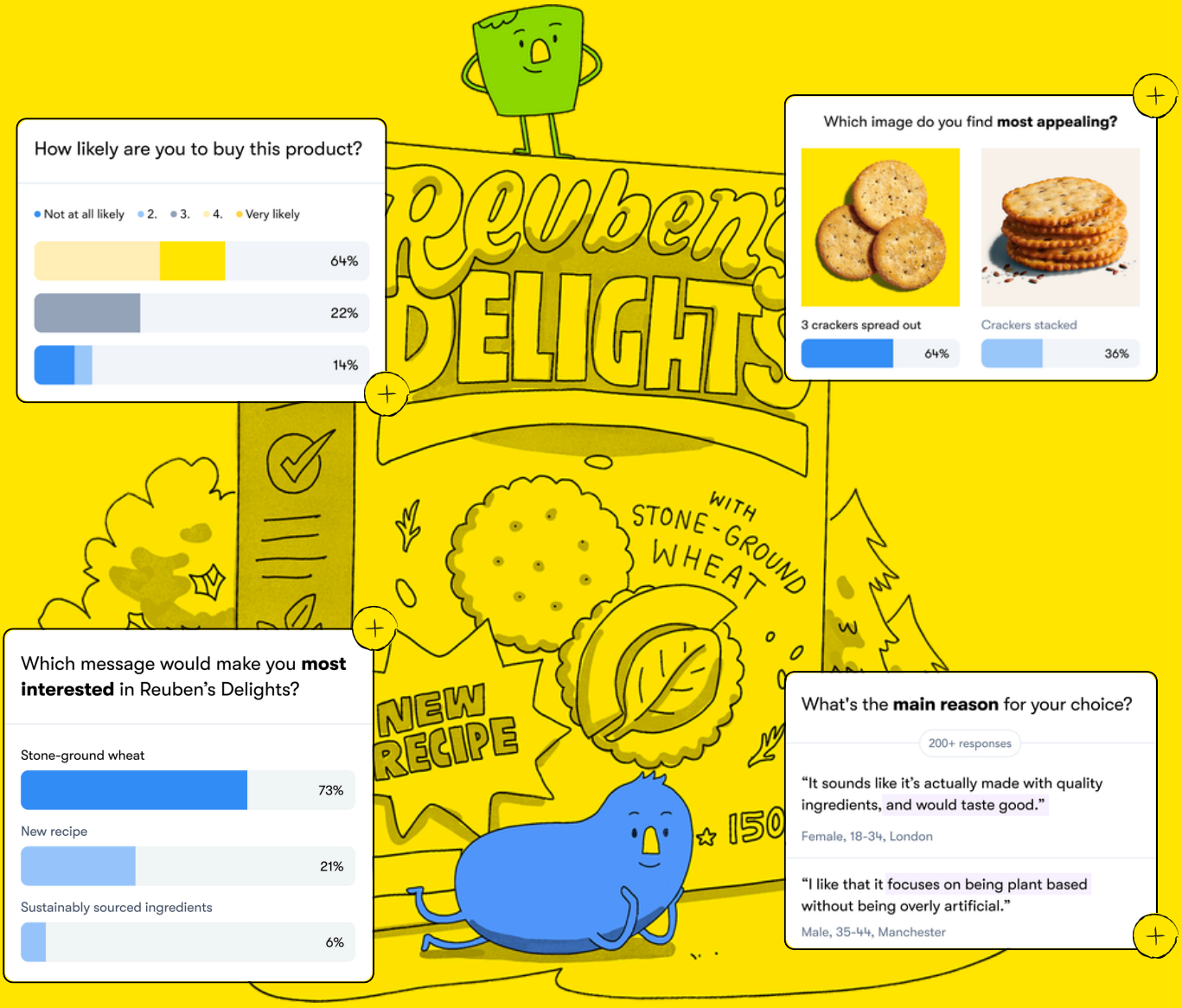
As marketers, we know trends like these rarely arrive with a bang. There's no single announcement: "and the new trend for this year will be..." They show up in small signals instead. Understanding a trend, and how it actually plays out for your brand and your products, can throw up some real surprises.

This report proves that more than once. The gap between what looked like the safe assumption and what shoppers actually told us, when we simply asked them, was often bigger than expected. The only way to close that gap for your own brand is the same one we used here: skip the guessing, and ask the people who'll actually be buying it the questions that will help you decide.



Meet Stickybeak

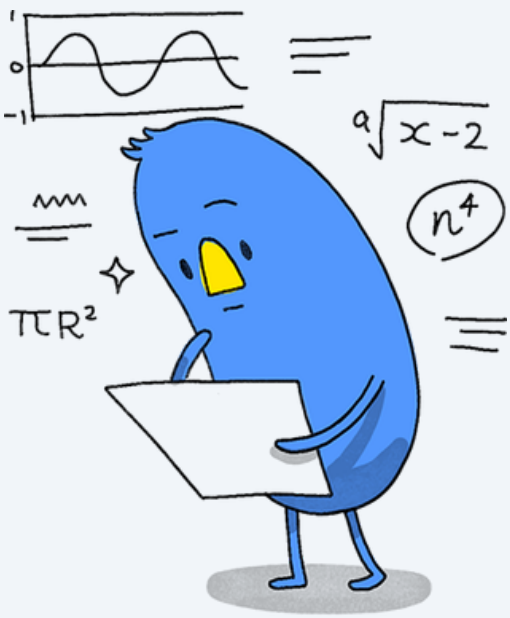
We're the consumer testing platform for marketers, and where the data behind this report was collated.



Stickybeak is built for the way marketers actually work and decide on things. A question on Monday and an answer by Wednesday. Ask your target audience (in over 200 geographies and more than 50 languages), with no agency fees and no research background needed.

Test your stuff. Be more awesome!

The data sources



Our testing

The tests: We ran six separate consumer tests for this report rather than one long one trying to cover everything at once, each built around a specific question we wanted a real answer to, not a hunch.

Consumer test	What it covers	Sample	Markets
Treatonomics	Treat spending, eating out, premium vs value choices	n=816 (n=204 per market)	UK, US, Australia, New Zealand
GLP-1 ready meal claims	Claim comprehension and preference on ready meals	n=816 (n=204 per market)	UK, US, Australia, New Zealand
GLP-1 proximity	Purchase behaviour by closeness to GLP-1 use	n=816 (n=204 per market)	UK, US, Australia, New Zealand
Fibre vs protein	Claim preference across muesli, snack bars and post-workout drinks	n=816 (n=204 per market)	UK, US, Australia, New Zealand
AI delegation threshold	What shoppers will and won't let AI decide	n=816 (n=204 per market)	UK, US, Australia, New Zealand
Own label	Everyday vs occasion choices, own label perception	n=204	UK only

Who answered:

Every market cell splits evenly, 204 respondents each, and within each of those, an even split by gender and across three age bands (18-34, 35-54, 55+). That's quota-controlled sampling, not an organic sample that happened to land close to even, so no single group is carrying a finding.

UK versus all four markets: Most of this report's data covers the UK, US, Australia and New Zealand in equal numbers, which is why some stats are flagged "UK" and others "across all four markets," rather than assuming one figure speaks for both. Where a finding only holds up at the combined four-market level, because the UK sample alone is too small to separate out safely, we've said so directly in the text.

Testing what's real:

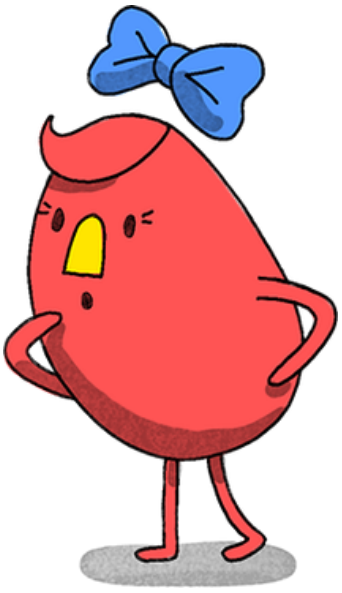
Wherever we call a difference "statistically significant," we tested it, using a two-proportion z-test at the 95% confidence level, the standard used across marketing research and consumer testing. Where a gap didn't clear that bar, we either didn't call it significant or said so plainly. For findings built on smaller groups, like the premium-versus-value chocolate pickers or the UK-only age bands, we calculated the margin of error and flagged it at the point it's used.

Other sources:

Not every number here is ours (teamwork makes the dream work, and all that). Where we've used third-party data for context, we've named and dated the source at the point it's used, the full citation for each sits under "What we borrowed" at the end of this report.

Respondent privacy:

Respondents opted in, and nobody's identifiable anywhere in this report or the data behind it. Verbatim quotes are tagged only by gender, age band and/or market, never a name, so they are stripped of anything that could identify someone before we use them. We collect, store and process respondent data under the same GDPR-ready standards we apply across all our research.



What to keep in mind:

This is self-report survey data gathered online, people describing what they'd choose, not till receipts or loyalty card data showing what they actually bought. Where two things move together in our data, we've said they correlate, not that one causes the other. And a sample of 204 per market is solid enough to spot a real pattern, but it isn't a census, we've flagged the specific cases where a sub-group gets small enough to treat the number with more caution.

What we borrowed
(secondary data sources)

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