Triyit®

BRAND ~~PSYCHOLOGY~~

PHARMACOLOGY

We asked 9,417 UK consumers to find out how GLP-1 is rewiring brand loyalty in FMCG

MRS Evidence Matters™ Company Partner

esomar Corporate 2026

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THE FORECAST

1 IN 3

checkouts in 2030 will be from a GLP-1 household

*AlixPartners

YOU CAN'T OUT-ADVERTISE A QUIETER CRAVING.

84%
get full faster

79%
think about food less

80%
feel more in control

73%
no longer crave what they craved

Current + ex-users

SCALE OF THE SIGNAL.

Triyit is the UK's consumer engagement platform with over 1.25 million deeply profiled consumers.

For this study, we screened **9,417 consumers** and found 11% already on GLP-1, double the national rate.

We took a deep read of those users, one of the UK's largest GLP-1 samples, and also surveyed ex-users and non-users, to get a full read on how GLP-1 is rewiring the basket.

Screened n=9,417 on GLP-1 usage status; 11% currently using. Then surveyed n=1,618: current users n=1,053, with directional reads from ex-users n=264 and non-user comparator n=301.

1.25M+
UK consumers

135K+
GLP-1 users

up to 2x
vs rate of adoption

Tryit

Dr. Derek Connor

DIRECTOR & LEAD DATA SCIENTIST

HOME TRUTHS.

Most research panels pay strangers to have opinions. But a £2 survey buys £2 answers.

Ours runs on a different deal. We built a home-grown community of **over 1.25 million UK consumers**, each deeply profiled across twenty dimensions: household, kids, brand affinities, channel behaviour and more.

We put products in real homes and let people find new favourites. That trust becomes insight others can't reach.

It's why we hit 94% completion, not 4%. And why people tell us the sensitive things, like how GLP-1 is changing their behaviour.

1,754,250+ Questions answered every month for leading FMCG brands

Reviews 90,296 • ★★★★★ 5.0

Coca-Cola · THG · Kellogg's · St Pierre · Pedigree · HEINZ · Corona · BLINK! · Pringles · Arla · COSTA

THE MOLECULE

THE MOUNJARO MULTIPLIER.

Our study, like the UK market, skews to Mounjaro: 63.6% of users. Most US benchmarks come from an Ozempic-led market and a weaker molecule.

Cornell and Numerator put the US grocery effect at around 6%. We found the same shifts here, consistently sharper. So when you look at American data, remember that it's your floor.

+8–12pp
stronger food-noise suppression

+9.4pp
sharper supplements uplift

+8.6pp
harder legacy-confectionery exit (Nestlé)

~flat
pet-food control, again

Mounjaro vs non-Mounjaro, directional; molecule and/or tenure – June 2026

THE REFRAME

YOUR COMPETITOR MAY NOT BE ANOTHER BRAND.

GLP-1 rewires appetite, habit, impulse and reward.

THE REAL COMPETITORS

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THE HALO EFFECT.

~87%	live with at least one other person
~78%	are the main shopper for their household
61%	say GLP-1 has changed the whole household basket

Don't size GLP-1 by users. Size it by baskets touched.

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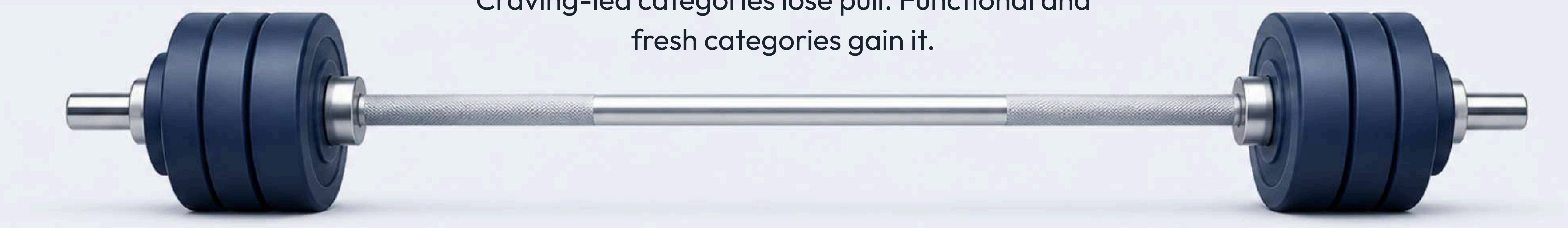
GLP-1 BARBELLS THE BASKET.

Craving-led categories lose pull. Functional and fresh categories gain it.



PARED BACK

Indulgence, crisps, convenience, big-shop volume

MIDDLE THINS

The habitual, default middle gets squeezed out

LEANING IN

High-protein foods, fresh produce, supplements, premium single-serves

Illustrated brands are a structural read

— Pet food, our control, stayed flat. The dog, unlike the owner, is not on Mounjaro.

LOSING. GAINING. QUANTIFIED.

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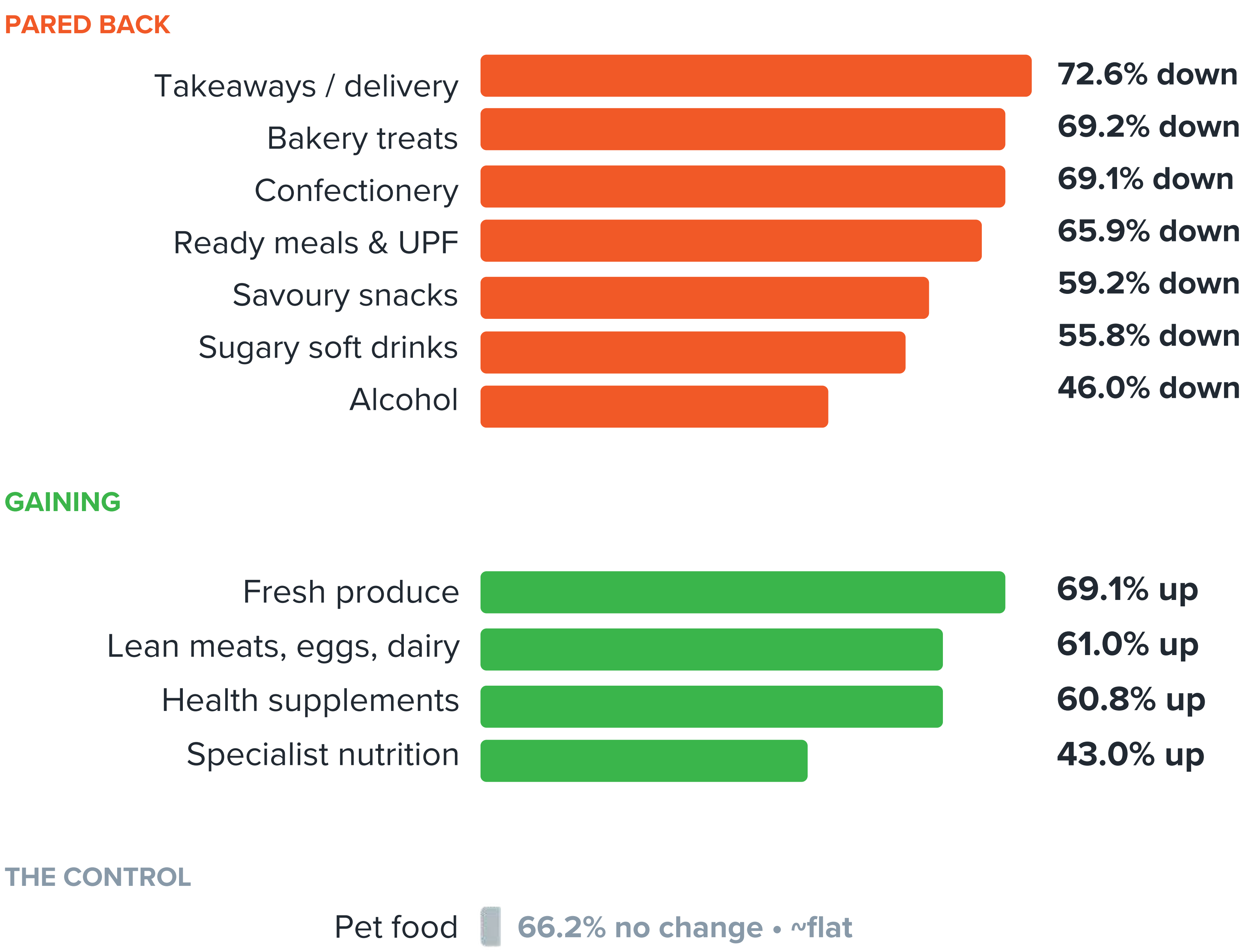
% buying less / more



All respondents (current + ex + non-users)

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TRADING UP?

ASSUMPTION:

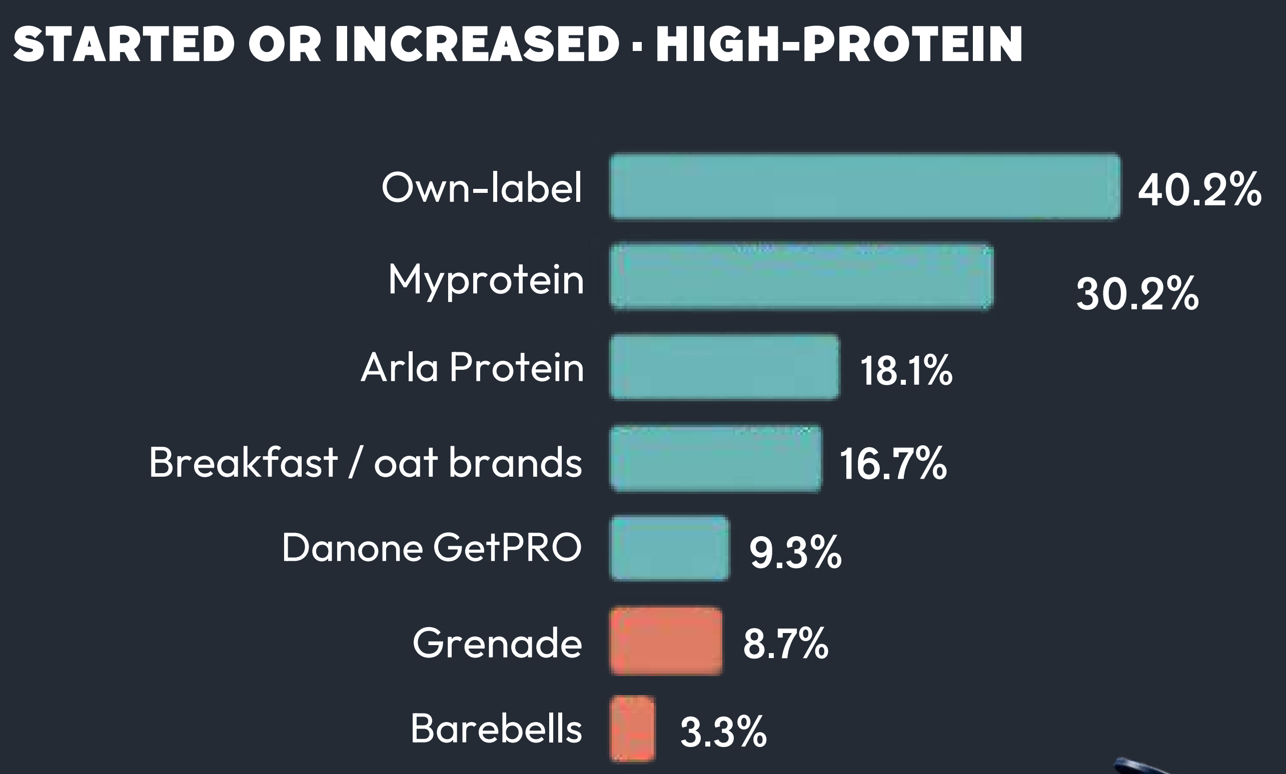
GLP-1 users trade up to premium protein brands

REALITY:

OWN-LABEL IS WINNING THE PROTEIN AISLE.

The money goes to own-label and value protein,
not the premium challengers everyone assumed.

The full table runs 21 brands deep. Ask for yours.



*Though premiumisation may still exist elsewhere. Deeper exploration ahead.

Current + ex-users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AUTOPILOT IS BROKEN.

71%

more open to brands they've never bought than a year ago

61%

swapped a favourite inside 12 months

40%

trust new high-protein brands like established ones

THE DISCOVERY WINDOW

DAY-ONE SHOPPERS.

A brand habit built over years can now break in a moment. That's pharmacologically-induced plasticity: the drug loosens loyalty long enough for these shoppers to behave like day-one buyers.

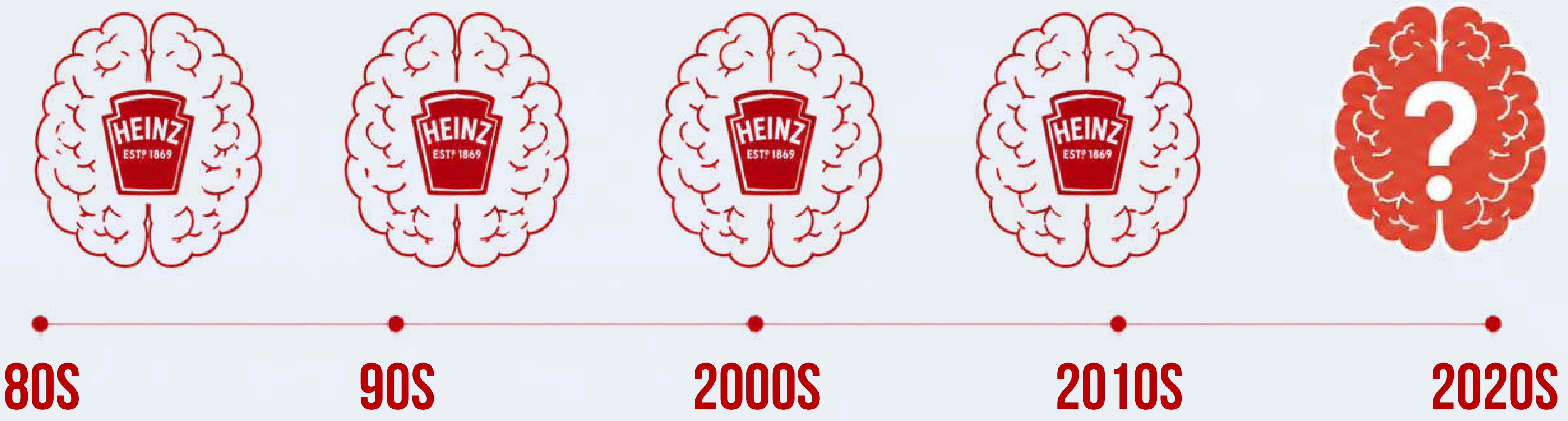
The most winnable shoppers in Britain, and they're holding the family wallet.

Current + ex-users


IT HAS TO BE
????

THE DISCOVERY WINDOW

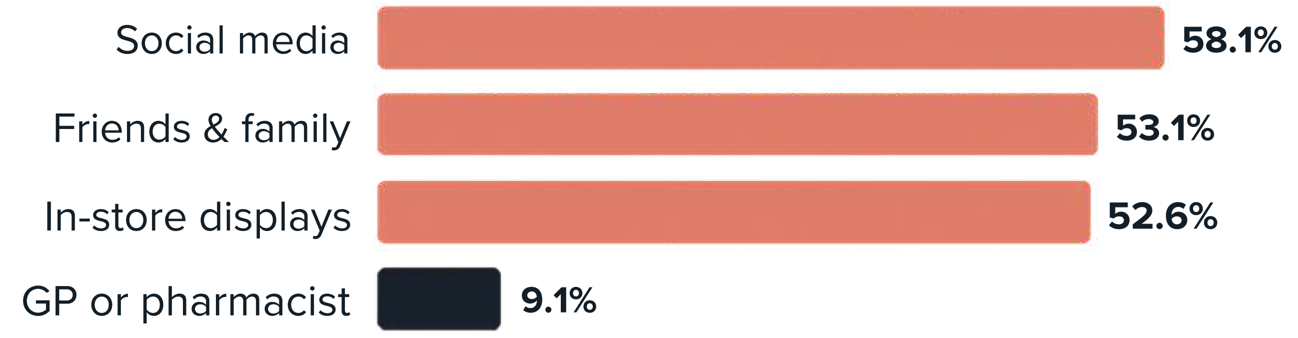
IT HAS TO BE... RECONSIDERED



71% are more open to brands they've never bought than a year ago often disrupting entrenched brand loyalty.

And social and the shelf help decide what's next.

WHERE NEW BRANDS GET DISCOVERED



Current and ex-users who are more open to new brands

THE (NOT SO) BIG SHOP.

The occasions survived. The pack sizes didn't.

The slab becomes a **premium single-serve**; the sharing bag becomes better-for-you.

And the big shop. It becomes smaller, intentional missions.

FROM SLABS

TO SINGLE-SERVE

FROM THE 'BIG SHOP'

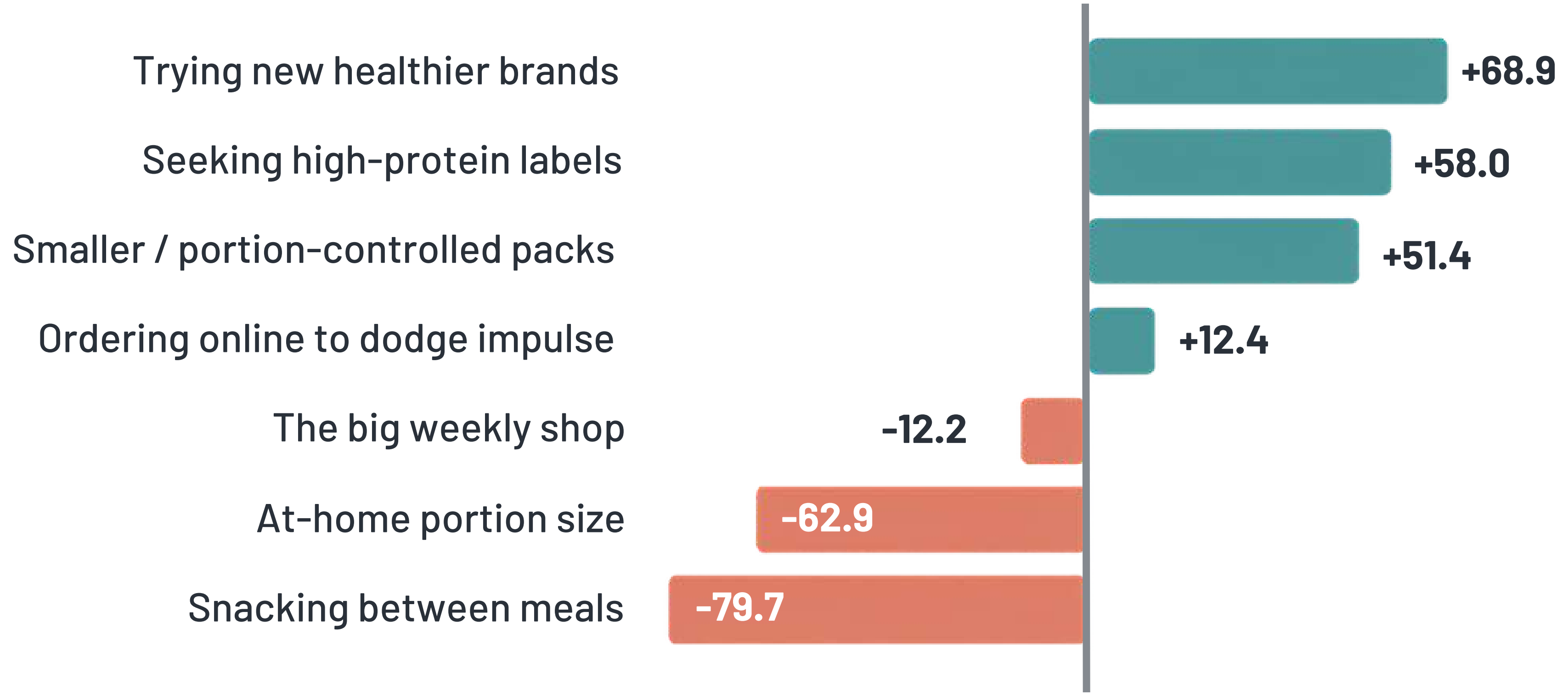
TO SMALLER, INTENTIONAL MISSIONS

Current + ex-users – June 2026. Pairings illustrative.

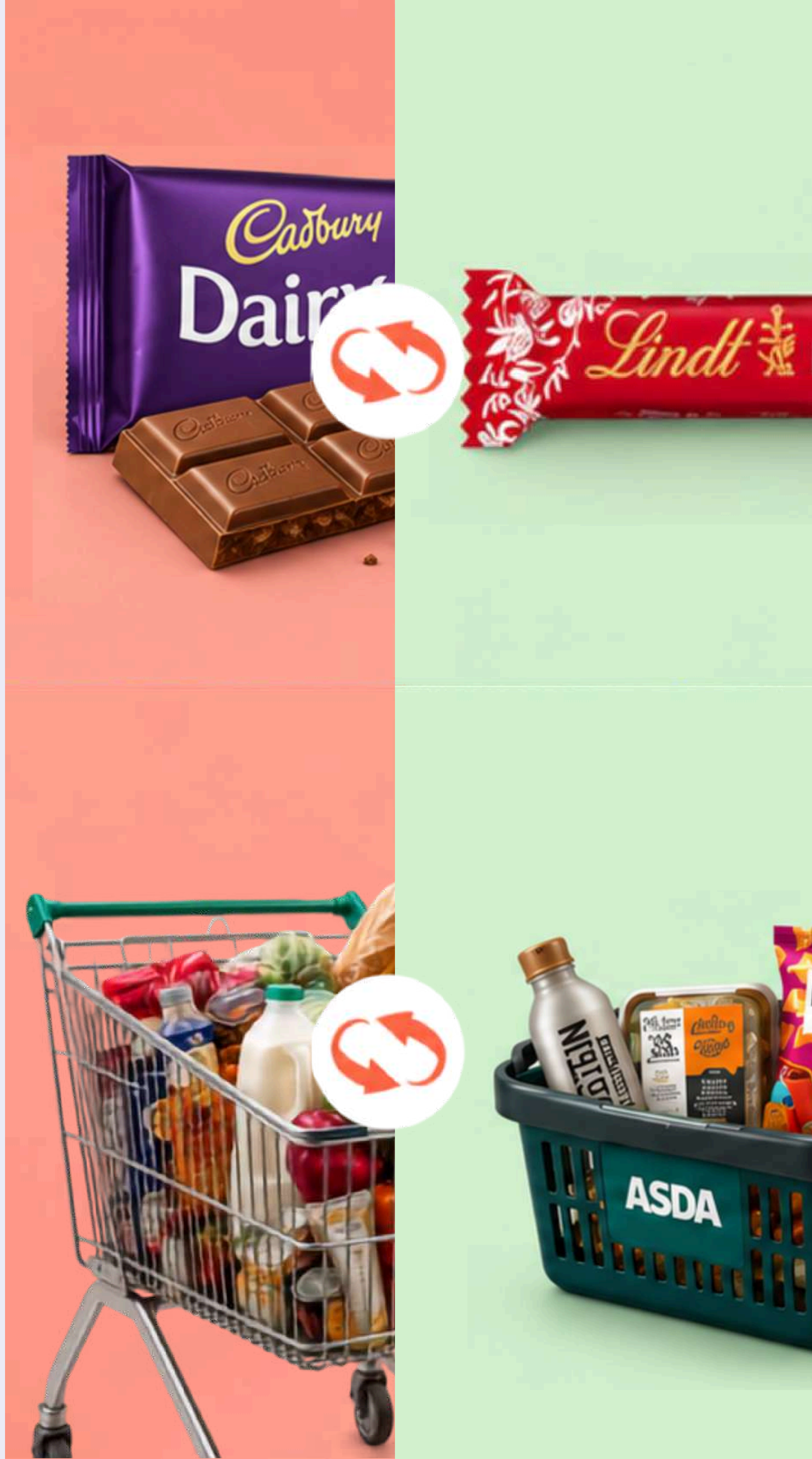
THE (NOT SO) BIG SHOP

MEASURED.

HABIT SHIFTS, NET . % more – % less



Current; net = % more – % less



CHANGING CHANNEL.

Discounters are up for everyone (GLP-1 users and non-users), that's the cost of living. Everywhere else, the swing is the drug. Premium gains, big box is flat and convenience is in serious decline.

1. Specialist health / online

+34 swing

2. Premium

+10 swing

3. Discounters

+3 swing

4. Big Box

0 swing

5. Convenience

-22 swing

6. Forecourts

-15 swing

Current vs non-GLP-1 user baseline

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THE COST CLIFF.

A churning population, not a fixed one.

60% of ex-users discontinued due to price

170% increase in Mounjaro's list price since September 2025

So you chase high churn GLP-1 consumers...

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DRUGS CHURN. HABITS PERSIST.

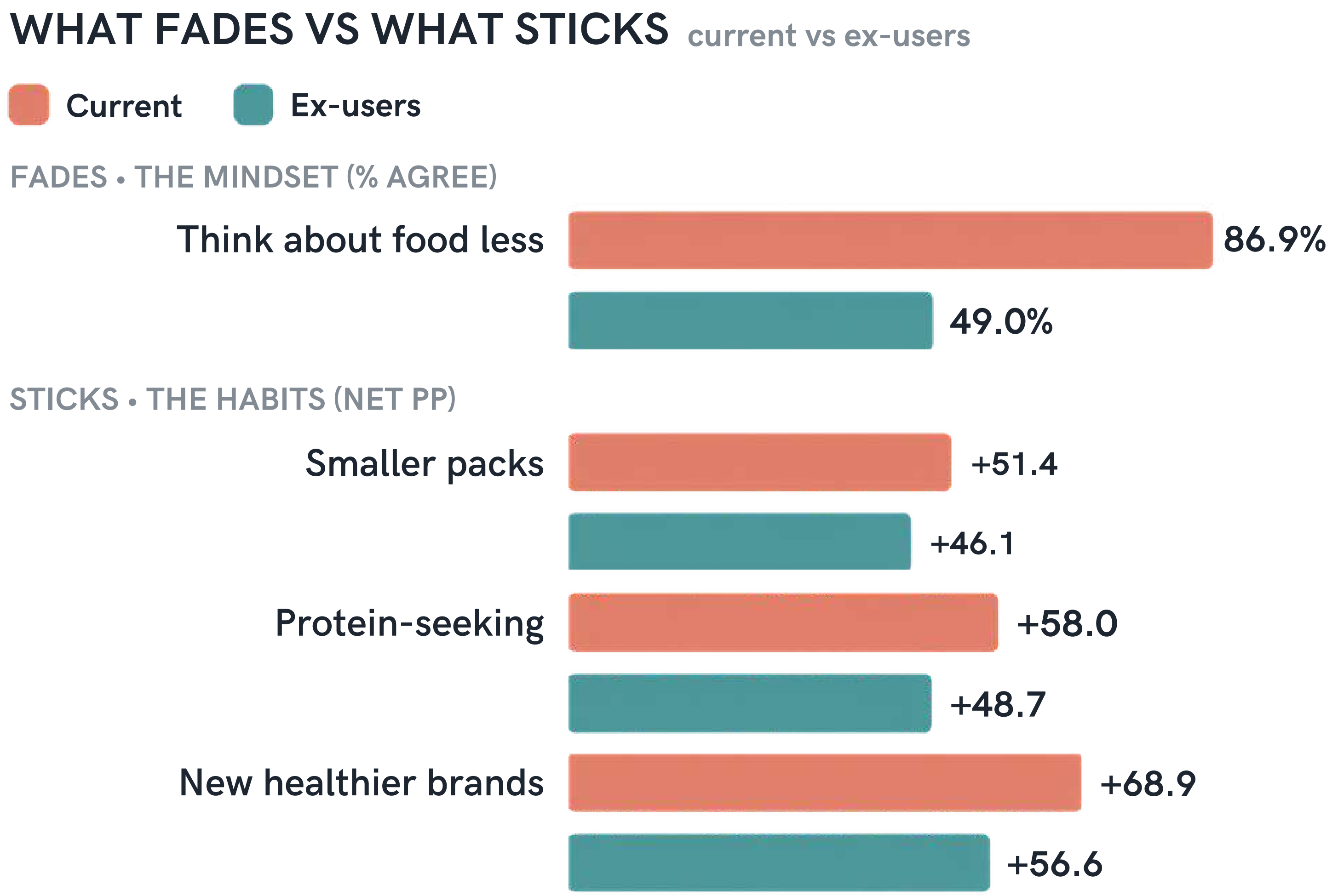
The drug may stop. The basket reset doesn't.

With a heavily private market and 74.3% self-funding, cost unsurprisingly is the main reason consumers discontinue.

Many later restart, creating a cyclical consumer. Yet even off treatment, key behaviours persist: smaller packs, more protein and healthier brand choices.

For FMCG brands and retailers, these consumers remain relevant long after the prescription stops.

Current users + ex-users



JUST THE BEGINNING.

Since conducting this study, oral GLP-1 has arrived, and it's expected to **double user numbers within twelve months**.

Of those already considering the drug in our study, 8 in 10 say they'd switch to a pill rather than an injection.

GLP-1 adoption has only just begun.

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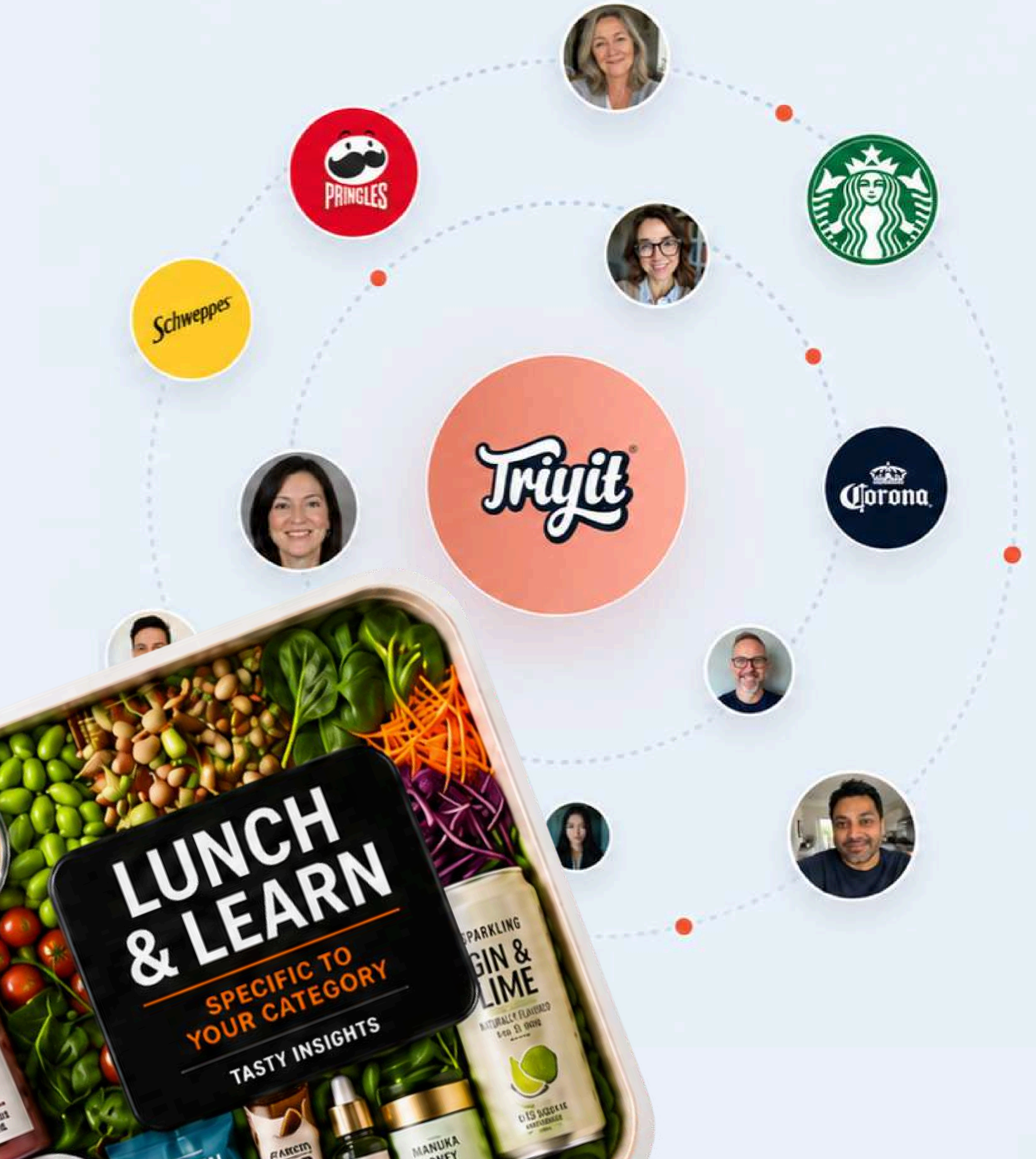

GO DEEPER.

Want a deeper read on how the rapid adoption of GLP-1 is affecting the basket, loyalty or **specifically your category**?

Book a complimentary lunch and learn session.

Book Lunch and Learn →

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