

CONSUMER BRANDS ARE BECOMING HEALTHCARE'S NEXT LEADER

Examining the Convergence of Consumer Brands and Healthcare

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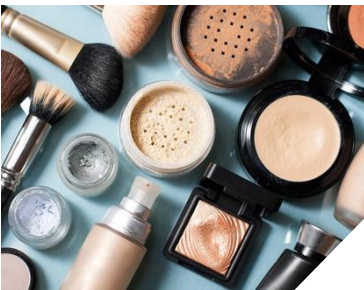
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The wellness convergence is underway – here's what's shaping it.

KEY TAKEAWAYS



Consumer brands and healthcare are competing for the same territory. The everyday health decisions that happen outside clinical settings.



The shift is already visible. Retailers, food companies, and beauty brands are expanding from products into health services and clinical adjacencies.



Strengths don't automatically transfer. Consumer expertise doesn't automatically confer clinical credibility, and clinical expertise doesn't automatically resonate with consumers. Sustained leadership requires integrating both.



The window is open but closing. The pace of capability development will shape who leads everyday wellness in the 2030s.

Consumer brands are moving into health. Healthcare is moving toward consumer experience. Both are converging on the same territory.

These two forces are **converging on everyday wellness** – and neither sector has established clear ownership.

Wellness is no longer a category – it is an expectation. What was once a niche market has become a \$2 trillion economy touching nearly every aspect of daily life: how people sleep, eat, move, manage stress, and think about their futures.

The shift is **visible in consumer behavior**.

Research from Ipsos Global Trends reveals that **79% of people globally want more control over their health** – and they're acting on it.

Two-thirds of Americans now take vitamins and supplements daily, a health behavior occurring outside clinical settings.

Consumers **increasingly think about wellness beyond traditional healthcare**: it's food, technology, mental health as much as physical.



The decision to pursue wellness is behind most organizations. The true test is **whether they can operate authentically across both consumer and clinical worlds simultaneously.**



Between these two sectors lies an established middle ground: consumer healthcare.

The recent spin-offs of major pharma consumer health divisions – Haleon from GSK, Kenvue from Johnson & Johnson, Opella from Sanofi – **signal that pharmaceutical companies view consumer healthcare as strategically distinct** from prescription medicine, requiring different capabilities, distribution models, and engagement approaches.

Kimberly-Clark's subsequent acquisitions in this space **show the pull is working in both directions:** consumer goods companies see real opportunity in health-adjacent categories.

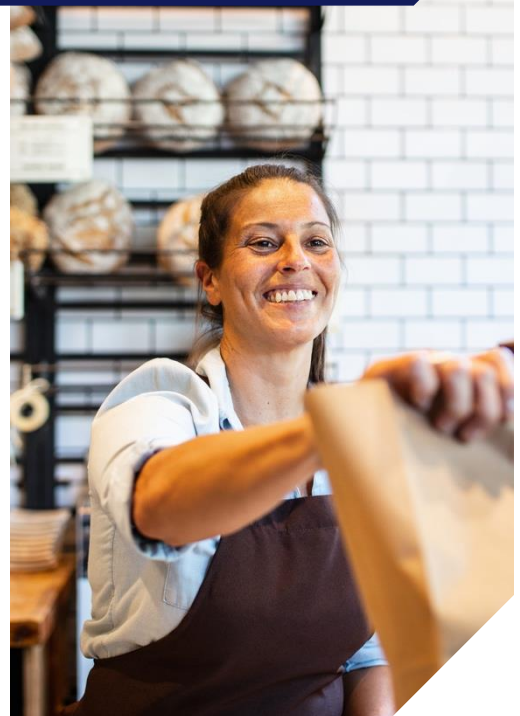
These structural moves confirm the **convergence is already reshaping corporate portfolios across industries.**



Even as corporate portfolios realign, **the gap between what consumers expect from healthcare and what they *actually* experience continues to widen.**

Consumers increasingly expect healthcare to match consumer platform experiences –

- In a 2024 Ipsos study, nearly 6 in 10 workers said healthcare would improve if it mirrored platforms like Amazon or Netflix – a sign that consumer expectations are no longer just influencing healthcare, they're redefining it.
- Yet the gap between expectation and delivery remains stark. Research from Ipsos and ixlayer found that 81% of patients expect pharma to help them access care, but only 16% feel prioritized. That gap is exactly where consumer brands are stepping in.



The daily health decisions shaping long-term outcomes are happening outside the clinic – and multiple players are racing to own them.

Everyday wellness is where these two forces meet: the daily decisions shaping long-term health, from sleep and nutrition to movement, stress, and mental resilience. These moments happen in kitchens, bathrooms, retail aisles, and workplaces, more removed from clinical settings.

Neither sector owns this space. Healthcare systems have **clinical expertise and high trust** – Ipsos research consistently ranks physicians among the most trusted professionals – but limited daily touchpoints.

Consumer brands have **daily presence and cultural relevance** but typically lack clinical credibility.

The real prize isn't wellness revenue – **it's the consumer relationship.** 45% of people heard about GLP-1 drugs from social media versus only 19% from medical professionals.

Trust is migrating from institutions to everyday touchpoints.

The brands that earn trust in daily wellness moments **may become consumers' first call when health concerns escalate.**

This is not
entirely new.



Cosmeceuticals have existed **since the 1980s**, P&G explored cross-business health and beauty initiatives **years ago**, and retailers have managed Health and Beauty Aid departments **for decades**.

What **distinguishes this moment is the scale of investment, the range of categories involved, and the speed** at which competitive positions are being established.



This is already playing out across categories – companies are expanding from products into health services and clinical territory.

RETAIL & FOOD

Leveraging daily presence to move into health territory



Walmart launched Better Care Services in January 2026 – a digital platform combining telehealth, AI-powered nutrition recommendations, and pharmacy integration, reflecting a view that healthcare works better when embedded into existing retail touchpoints.

Target added approximately 2,000 wellness products in 2025 spanning mental health, supplements, and sexual wellness – a rapid expansion signaling that everyday wellness is becoming a core merchandising category, not a niche aisle.

Nestlé reorganized around health as a core strategic pillar, building precision nutrition capabilities and identifying women's health, longevity, and weight management as key growth platforms.

Erewhon now offers med-spa treatments including lip flips and brow lifts through in-store partnerships – when a grocer provides cosmetic medical treatments, the boundary between food retail and healthcare has effectively dissolved.

Olipop and AG1 – a new wave of functional brands building clinical positioning around gut health, metabolism, and microbiome science, operating with health claims that approach therapeutic territory.

The same shift is reaching beauty – consumers now expect clinical-grade results, not just cosmetic appeal.

BEAUTY

Clinical credibility meets consumer experience



L'Oréal is pushing beyond cosmetics into longevity and anti-aging science through partnerships with luxury groups – signaling ambitions that extend well past skincare into wellness innovation.

Hims & Hers originally launched for hair loss and skincare, then expanded aggressively into GLP-1 distribution. Weight loss became one of its fastest-growing categories, demonstrating how a DTC beauty-adjacent brand can move into clinical territory while maintaining consumer-grade experience.

Sephora has responded to the clinical shift by expanding dermatologist-backed offerings and training advisors to discuss skin health – blurring the line between beauty retail and health consultation.

Moon Juice, Ritual, Armra are heading up the "beauty from within" movement which has brought supplements and ingestibles into beauty retail, with adaptogens, vitamins, and colostrum now sold alongside skincare at major retailers.

La Roche-Posay, CeraVe, and Clinique are dermatologist-partnered brands that have achieved mass-market consumer appeal while maintaining clinical credibility. La Roche-Posay is now investing in microbiome science, neuroscience research, and an acne-management coaching app, pushing further into health territory.

And it runs both directions – healthcare organizations are building consumer capabilities of their own.

1



Abbott launched Lingo, a continuous glucose monitor designed for non-diabetics seeking metabolic optimization, partnering with fitness platforms to reach wellness-focused consumers rather than patients.

2



Novo Nordisk recently re-partnered with Hims & Hers to distribute Ozempic and Wegovy through its DTC telehealth platform – a major pharma company choosing a consumer health platform as a primary distribution channel for blockbuster medications.

3



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Major health systems including Cleveland Clinic, Mayo Clinic, and Kaiser Permanente have launched consumer-facing wellness programs, nutrition services, and lifestyle medicine offerings that extend beyond traditional clinical care.



These moves reflect healthcare's recognition that the **consumer wellness market represents both a growth opportunity and a competitive threat.**

Four patterns are emerging across industries that are reshaping how companies create and capture value in wellness.

FROM PRODUCTS TO RELATIONSHIPS



Leading companies are moving beyond transactions **toward ongoing health relationships**—subscription models, personalized recommendations, continuous engagement. Strategic value shifts from share of wallet to share of health journey.

FROM CLAIMS TO OUTCOMES



Competition is evolving from marketing assertions ("better for you," "dermatologist recommended") **toward demonstrable health results** with significant implications for evidence standards and measurement approaches.

FROM STANDALONE TO ECOSYSTEMS



Many companies **pursue partnerships with clinical providers, technology platforms, and health data companies** rather than building all capabilities internally.

FROM ADJACENT TO EMBEDDED



The level of ambition is escalating. Companies that once treated wellness as a brand attribute are **approaching it as core business strategy** with corresponding investments in capabilities, talent, and infrastructure.

Consumer brands bring distinct advantages to this space – ones built for how people engage with health day to day.

Consumer brands bring infrastructure, habits, and trust already built into consumers' daily lives. Healthcare brings clinical expertise and regulatory credibility. **Both matter – but each faces a different challenge in building what the other already has.**

WHERE CONSUMER BRANDS ARE POSITIONED TO WIN



Daily embeddedness means brands show up daily, not once a year in a waiting room, creating far more opportunities to shape health behaviors.



Cultural fluency connects through aspiration and lifestyle rather than symptoms. Ipsos Global Trends reports that 68% of consumers seek health info on their own before consulting a doctor.



Experience design built over decades creates engagement people want to return to. Wellness habits stick through engagement, not compliance.



Organizational agility means product cycles in months, not years, allowing rapid response to shifting health preferences.



Retail and distribution expertise provides shelf presence, supply chain knowledge, and shopper insights that healthcare brands would need years to build.

WHERE HEALTHCARE'S STRENGTHS REMAIN DECISIVE



Clinical expertise provides proven methodologies for evaluating and measuring outcomes, essential when health decisions carry real consequences.



High-stakes trust means consumers still turn to providers when it truly matters, a credibility asset built over decades, not campaigns.



Regulatory infrastructure through FDA oversight, evidence standards, and professional licensing forms a credibility foundation consumer brands must carefully navigate.

Operating credibly across both consumer and clinical worlds remains the central challenge.

The challenge is not acquiring capabilities. Organizations hire health experts, build clinical partnerships, and add consumer design talent regularly.

The deeper difficulty is integration: consumer logic and health logic operate from different assumptions about credibility, evidence, and success.

Consumer credibility **relies on brand trust, cultural relevance, and social proof.**

Health credibility **requires clinical validation, regulatory compliance, and professional endorsement.**

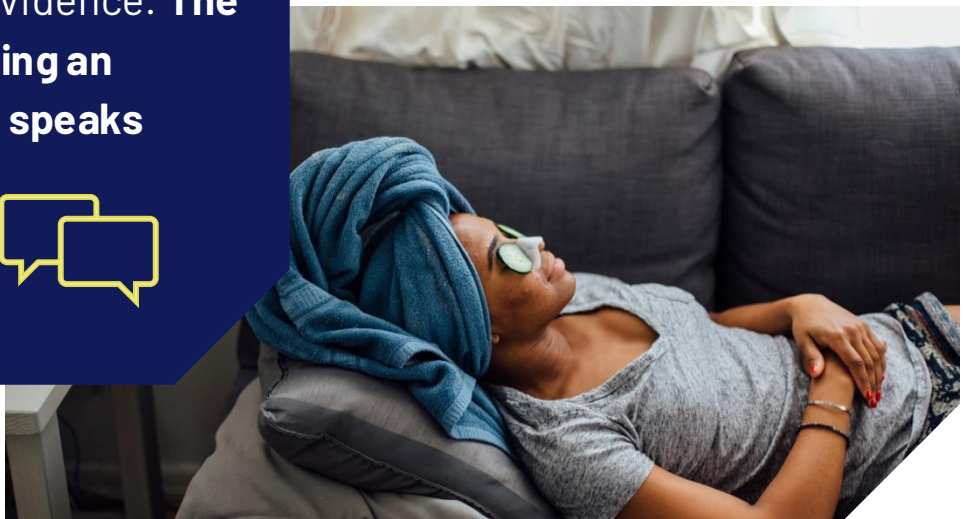
Organizations built around one logic often struggle to hold both simultaneously.

Successful integration is possible. Hims & Hers built a consumer brand with DTC design sensibility and cultural positioning yet operates with licensed clinicians, prescription capabilities, and FDA-regulated products at its core. The company did not bolt health onto consumer or vice versa; **it built the organization to hold both logics from inception.**

CeraVe demonstrates integration from a **different angle** — a skincare brand developed with dermatologists that achieved mass-market consumer appeal through accessible pricing and retail distribution while maintaining clinical credibility.

Noom combined **behavioral science methodology with consumer-grade** app design, blending clinical rigor with engagement-first experience.

Consumer brands earn trust through relevance. Healthcare earns it through evidence. **The challenge is building an organization that speaks both languages.**



Wellness engagement exists along a spectrum – and where an organization sits determines what it takes to move forward.



Most brands sit at Product Addition or Experience Creation, where required capabilities match existing strengths. The leap to Ecosystem Building is where most stall – it demands a different set of competencies.

The window is open – but who leads everyday wellness in the 2030s is being decided now.

Healthcare organizations are not standing still. CVS and traditional health systems are investing in consumer capabilities. **And consumer brands aren't waiting either** – Amazon has entered with formidable consumer expertise already built in.

Hybrid players like Hims and Ro, designed from day one to operate in both worlds, are scaling rapidly.

Organizations that **move decisively may establish positions difficult to displace.** Those that delay may find partnerships secured, talent hired elsewhere, and category standards set by others.

More fundamentally, they may find that **consumers have already decided who they trust for health guidance – and that decision was made in the wellness aisle, not the waiting room.**



As consumer brands build clinical credibility and healthcare organizations build consumer fluency, **the next generation of healthcare leaders may not look like the ones we know today.**



THANK YOU

ABOUT IPSOS

Ipsos occupies a distinctive position in this convergence – **with deep expertise across both consumer insights and healthcare strategy**. From competitive landscape analysis to wellness positioning to maturity assessment, **we help organizations build the dual fluency that wellness leadership demands**.

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