White Paper

An Agentic AI-Powered Consumer Health Revolution: Scenarios on How Foundation Models and AI Agents Could Transform Discovery, Trust, and Commerce

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Table of contents

Disclaimer

This whitepaper presents illustrative scenarios about the potential future impact of artificial intelligence, foundation models, and AI agents on the consumer health ecosystem. The views expressed are exploratory and depend on assumptions, emerging technologies, and regulatory developments that are uncertain and subject to change. The scenarios and examples described are not predictions, guarantees, or commitments and should not be interpreted as such.

Executive summary

Foundation models and AI agents are on track to become primary intermediaries between consumers, health information, and commerce. In consumer health, this could shift discovery and purchase decisions away from search engines, shelves, and brand websites toward persistent AI advisors that through a deep understanding of individuals needs, preferences, and risk profiles, acts on the user's behalf.

This paper explores plausible future outlooks rather than fixed predictions. Through scenarios, it illustrates how AI health advisors, intelligent e-commerce intermediaries, and AI-curated advertising could reshape how over-the-counter medicines, supplements, and wellness products are discovered, evaluated, and bought. Across these scenarios, four themes stand out: evidence and transparency become the core currency of trust; regulation must adapt from static content review to oversight of AI platforms; ethical questions around access and bias intensify; and human experience could remain still essential even in highly automated journeys.

For industry leaders, the opportunity lies in preparing now. Brands that invest in structured data, robust clinical and Real-World Evidence (RWE), transparent product dossiers, and AI-ready setup will be best positioned in a world where agents act as powerful gatekeepers and partners in delivering better consumer health outcomes.

Introduction

The consumer health industry stands at the threshold of potentially its most significant transformation since the advent of e-commerce. As AI evolves from simple chatbots to foundation models and autonomous AI agents, we may be entering a new paradigm for how consumers discover, evaluate, and purchase over-the-counter medications, supplements, and wellness products. Foundation models are large, versatile AI systems trained on vast datasets that can be adapted to many tasks.

For industry leaders in consumer health the understanding of these potential shifts is crucial and represents a strategic imperative for remaining competitive in an AI-mediated marketplace.

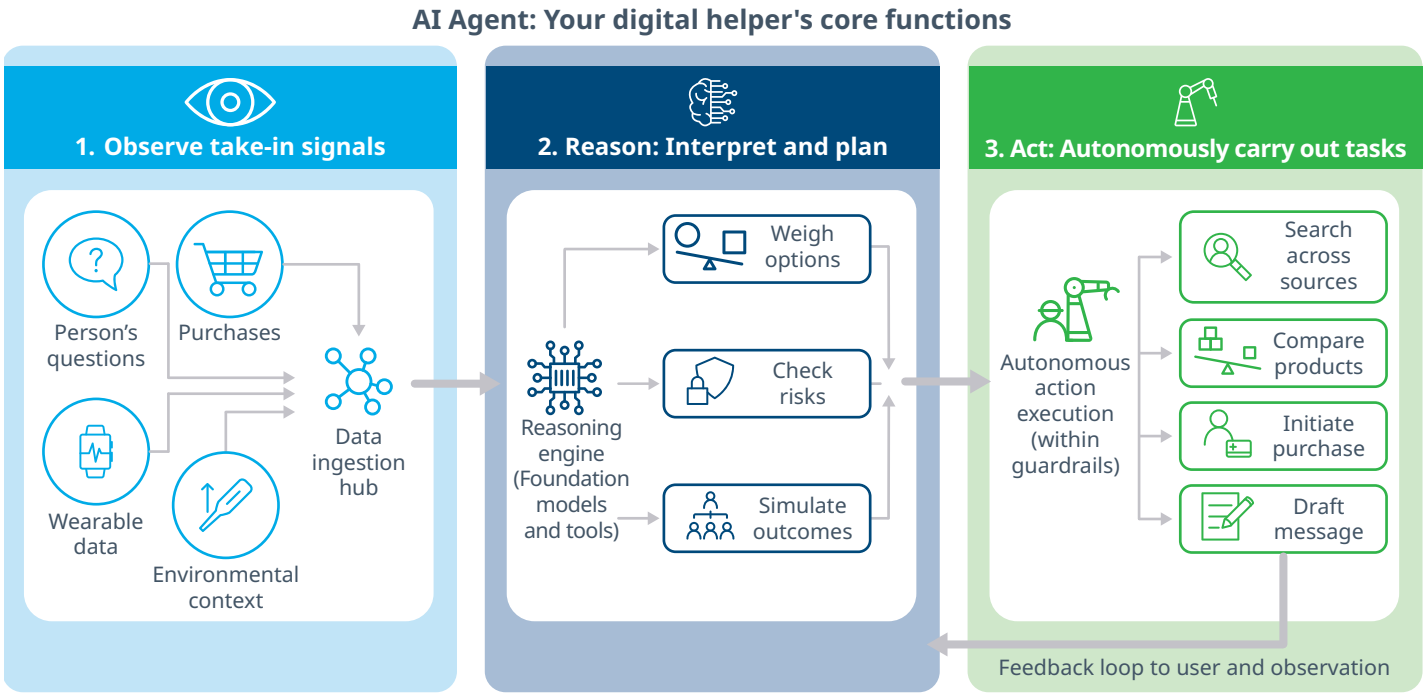
The consequences extend far beyond operational efficiency or incremental improvements to existing channels. These agents could fundamentally restructure the relationship between brands and consumers. Deploying AI Agents could mean traditional advertising models give way to dynamic, personalized product curation, and even lead to the very concept of 'shelf space' changing. This potential transformation demands that industry stakeholders start looking at how to reimagine their strategies across product development, marketing, channel management, and regulatory compliance.

What we mean by an AI "Agent"

In this paper, when we talk about AI agents, we mean something more capable than today's chatbots or recommendation widgets. An AI agent is, at its core, a "digital helper" that can:

- **Observe**: Take in signals over time, such as a person's questions, purchases, data from wearables, or environmental context
- **Reason**: Interpret those signals against goals and constraints, using foundation models and specialized tools to weigh options, check risks, and simulate outcomes
- **Act**: Autonomously carry out multi-step tasks on the person's behalf within agreed guardrails, for example by searching across sources, comparing products, initiating a purchase, or drafting a message back to the user. (see **Figure 1**)

Figure 1: The workflow of an AI Agent



Unlike a traditional chatbot that answers a single question and then "forgets," an agent can maintain a "relationship" with a person. It can remember preferences, learn what has or has not worked in the past, and coordinate actions across multiple channels and platforms. In consumer health, this means moving from "Ask once, get an answer" to "Help me manage this aspect of my health over time".

Seen from this perspective, we are currently at Point A in the AI evolutionary cycle: a world where AI already influences search, recommendations, and advertising, but mostly in isolated, channel-specific ways. The path ahead leads to Point B: a world where agentic AI becomes the primary interface between consumers, health information, and commerce, continuously curating options and acting as a proxy for the individual.

The scenarios that follow in this paper explore how that journey from Point A to Point B could unfold, and what it would mean for discovery, trust, and value creation in consumer health.

Point A — How AI already shapes consumer health today

Consumers are already surrounded by AI, even if they do not always label it as such. When someone types "best magnesium for sleep" into a search engine today, the first thing they see is no longer a simple list of links. AI-generated summaries appear at the top of the page, combining snippets from multiple sources into an instant "answer." Product carousels are ranked by opaque relevance scores. Recommendation engines surface "people like you also bought" suggestions across e-commerce platforms, pharmacies, and marketplaces. In other words, AI is already mediating what consumers see, trust, and buy, even though the experience still feels like traditional search and browsing.

On the industry side, many consumer health companies already use AI in a narrow, tool-like way. Media teams rely on algorithmic bidding and targeting to optimize digital campaigns. Customer service is partially automated through scripted chatbots and FAQ assistants. Some telehealth and pharmacy platforms offer symptom checkers that triage simple complaints, suggest over-the-counter options, or recommend seeing a physician. Recommendation systems on retailer sites combine past purchases, demographic profiles, and basic health interests to nudge consumers towards certain brands. These systems are real, and they matter, but they are still largely siloed and channel-bound. What is missing today is continuity and automated personalization to the individual.

The current generation of AI surfaces information and products in response to explicit queries or simple triggers, but it does not yet behave like an 'always on' health companion. A consumer's search history, wearable data, pharmacy purchases, and lifestyle preferences typically sit in separate systems and the AI that generates a search summary does not "remember" the supplement the person bought last month, and the e-commerce recommender does not truly understand the person's broader health goals or clinical risk factors. Today's AI is powerful at the level of single interactions, yet it remains fragmented, episodic, and mostly reactive.

At the same time, we are already seeing early hints of a more continuous, agentic future. Foundation models now power email copilots that draft replies, travel assistants that compare flights across platforms, and productivity tools that can schedule meetings or summarize documents on request. These systems are starting to move beyond one-off question answering towards multi-step tasks: they can call on tools and APIs, work through checklists, and maintain some memory of prior interactions. The technical building blocks for agents are therefore no longer speculative; they are emerging in adjacent domains and will inevitably migrate into health and wellness contexts.

Point B — An agentic future for consumer health

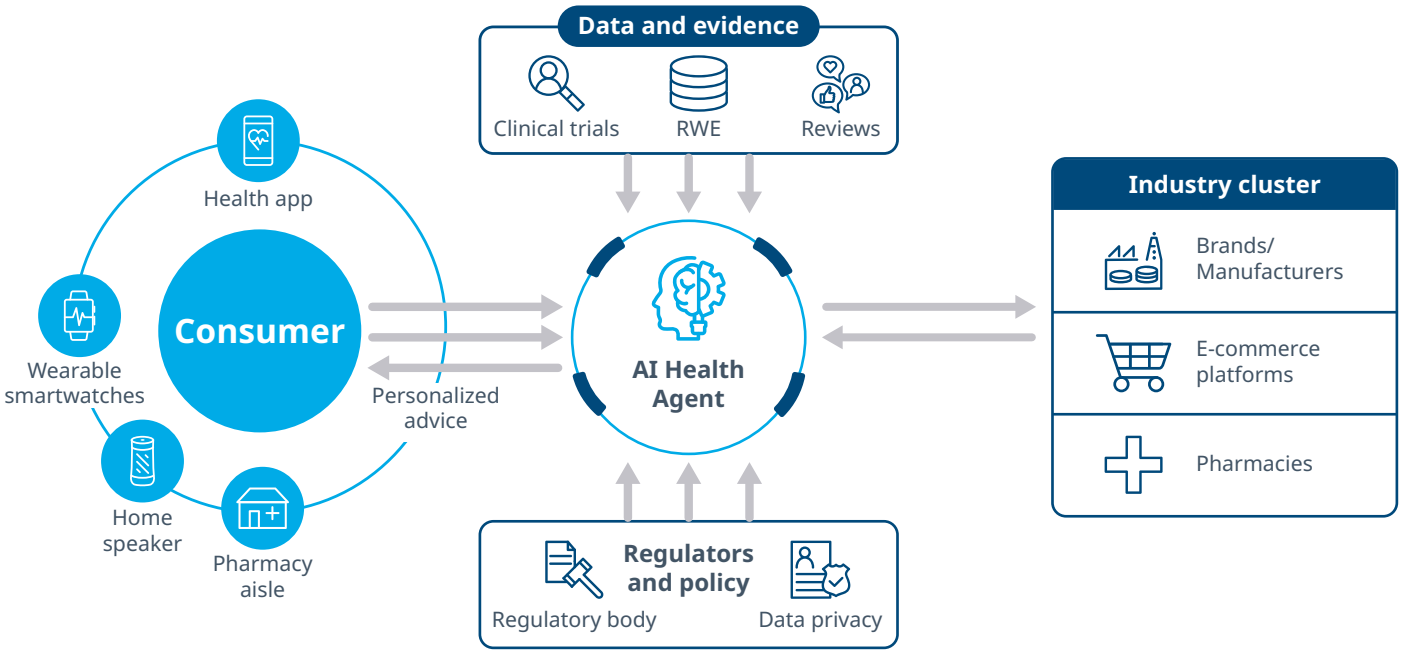
Nobody can predict with certainty how AI will reshape consumer health. Yet once we recognize how deeply AI already mediates today's searches, recommendations, and buying decisions, it becomes both necessary and valuable to explore where the next step might lead. Building on our Point A starting position with fragmented, channel-bound AI that already influences behavior we can now outline plausible paths towards Point B: a world where agentic AI plays a central role in how consumers manage their health.

The consequences of this shift extend far beyond operational efficiency or incremental improvements to existing channels. We are entering an era in which AI agents could fundamentally restructure the relationship between brands and consumers, where traditional advertising models give way to dynamic, personalized product curation, and where the very concept of "shelf space" becomes virtual, adaptive, and context specific. This potential transformation means that industry stakeholders need to look at reimagining their strategies across product development, evidence generation, marketing, channel management, and regulatory compliance.

The rise of personalized AI health advisors: From search to relationship

The shift from 'Dr Google' product discovery journey to AI-mediated health guidance represents perhaps the most profound change in consumer behavior we could witness over the next five to ten years. Today's consumers navigate a fragmented landscape of search engines, review sites, pharmacy aisles, and social media recommendations. Tomorrow's consumers will probably increasingly delegate these decisions to persistent AI agents that understand their complete health profile, preferences, medication history, and wellness goals (see **Figure 2**).

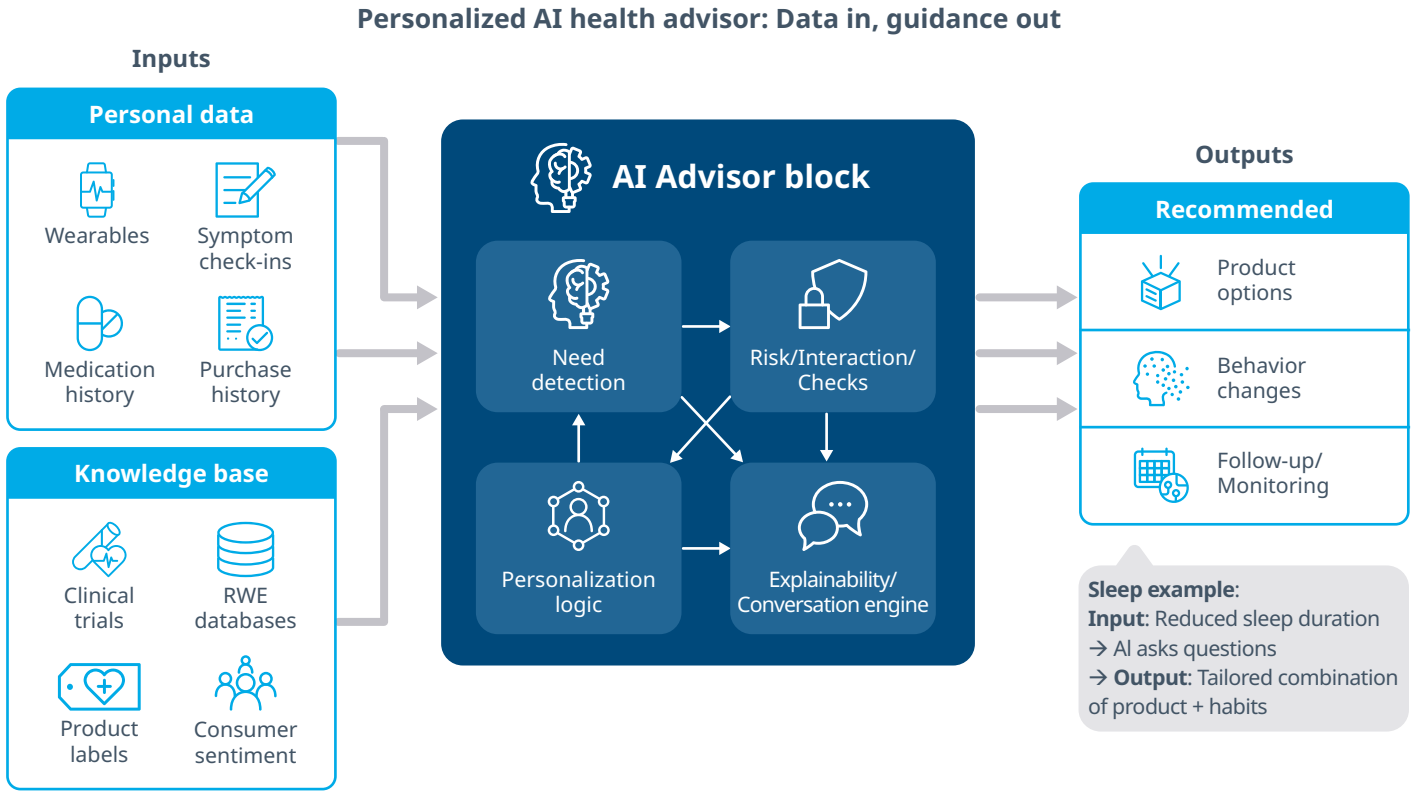
Figure 2: The AI-mediated Consumer Health ecosystem



Let´s consider a realistic scenario in the near future: A consumer experiencing persistent sleep difficulties will no longer begin by searching for "best sleep supplements" or standing in a pharmacy aisle comparing melatonin brands. Instead, their personal AI health advisor which is integrated across their smartphone, wearables, and/or home assistant environment (or completely new type of devices) will have already detected changes in their sleep patterns through passive monitoring.

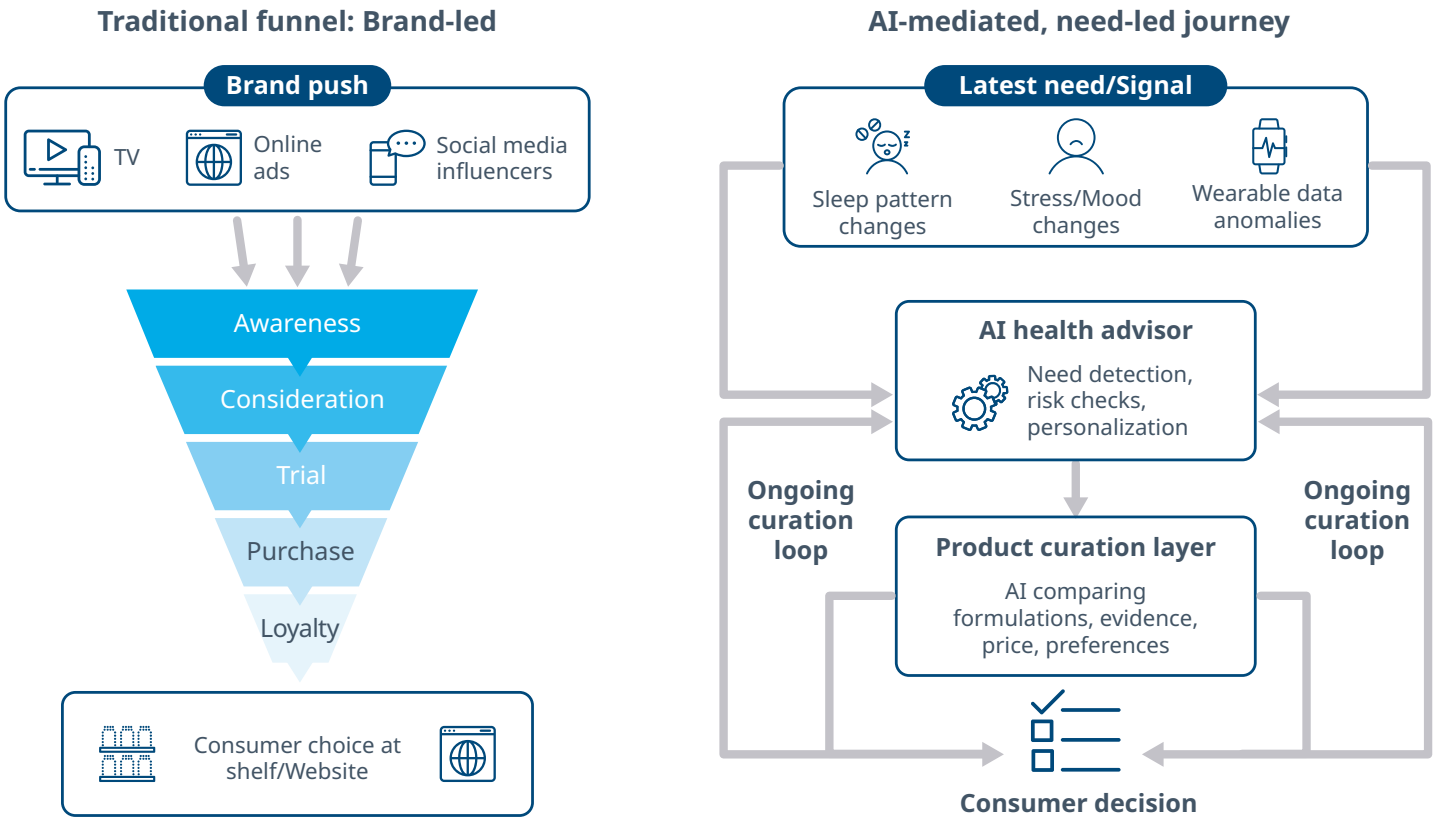
The AI agent initiates a conversational assessment, asking targeted questions about stress levels, caffeine intake, evening screen time, and medical history. Drawing from comprehensive knowledge of clinical research, ingredient efficacy, potential contraindications with the consumer's existing medications, and personalized data about what has historically worked for individuals with similar profiles, the AI advisor presents a curated recommendation that might include specific product formulations, behavioral modifications, and environmental adjustments (see **Figure 3**).

Figure 3: The new AI-driven health support journey



This scenario represents a fundamental shift from brand-led discovery to need-led curation. The traditional marketing funnel, where brands compete for attention at the awareness stage, becomes inverted. AI agents will identify a consumer's health needs proactively, often before an individual consciously recognizes them, and then will evaluate products based on personalized efficacy predictions rather than brand recognition or paid placement (see **Figure 4**).

Figure 4: From a traditional marketing funnel to an AI-mediated need-based journey



The brand that wins is not necessarily the one with the largest advertising budget, but the one whose product formulation, scientific evidence, and ingredient transparency best match the specific requirements identified by the AI agent for that individual consumer. Even when AI agents cannot anticipate needs because consumers may share only limited data, they will still act as powerful on-demand advisors, interpreting expressed symptoms or goals and matching them to suitable products whenever the consumer asks.

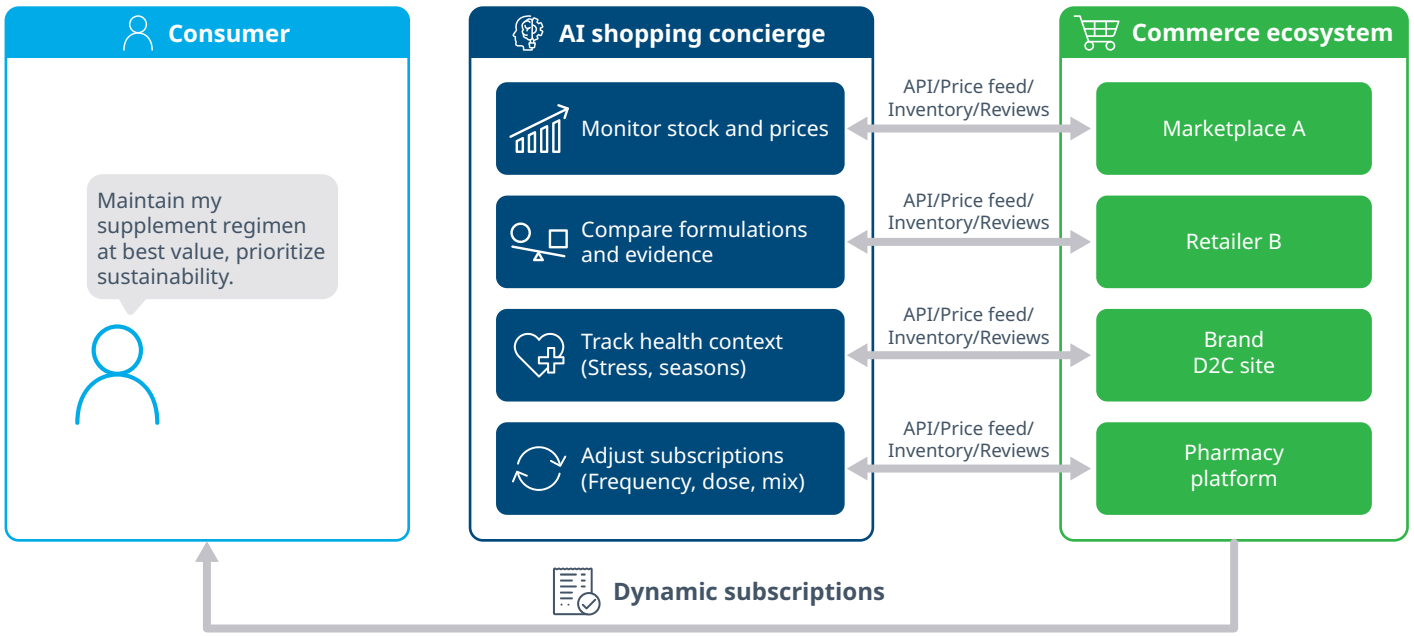
The implications for brand strategies are substantial. Companies will need to optimize not for human marketing-led discovery but for AI recommendation. This means investing heavily in machine-readable product information, comprehensive ingredient databases, clinical trial and RWE transparency, and structured data that AI agents can efficiently process and compare. The traditional mechanisms of brand building such as emotional storytelling, celebrity endorsements, and lifestyle associations will need to be complemented or may be even replaced by robust evidence packages that AI systems can evaluate objectively.

The transformation of e-commerce: From marketplace to intelligent intermediary

The evolution of buying channels could be equally as dramatic as AI agents assume the role of intelligent intermediaries between consumers and commerce platforms. They could act as a go-between for consumers filtering ads based on individual preferences, context and intent. The current model, where consumers browse digital shelves on retailer websites or marketplaces, could give way to a more complex ecosystem where AI agents negotiate, compare, and transact on behalf of users across multiple platforms simultaneously.

We should expect to see the emergence of AI-powered shopping concierges that maintain persistent relationships with consumers and possess delegated authority to make purchases within defined parameters. A consumer might instruct their AI agent to "maintain my supplement regimen at the best value, prioritizing quality and sustainability". The agent then continuously monitors inventory levels, compares pricing across retailers, evaluates new product launches against the consumer's health profile, and executes purchases automatically when certain conditions are met such as identifying a superior formulation or detecting a significant price reduction (see **Figure 5**).

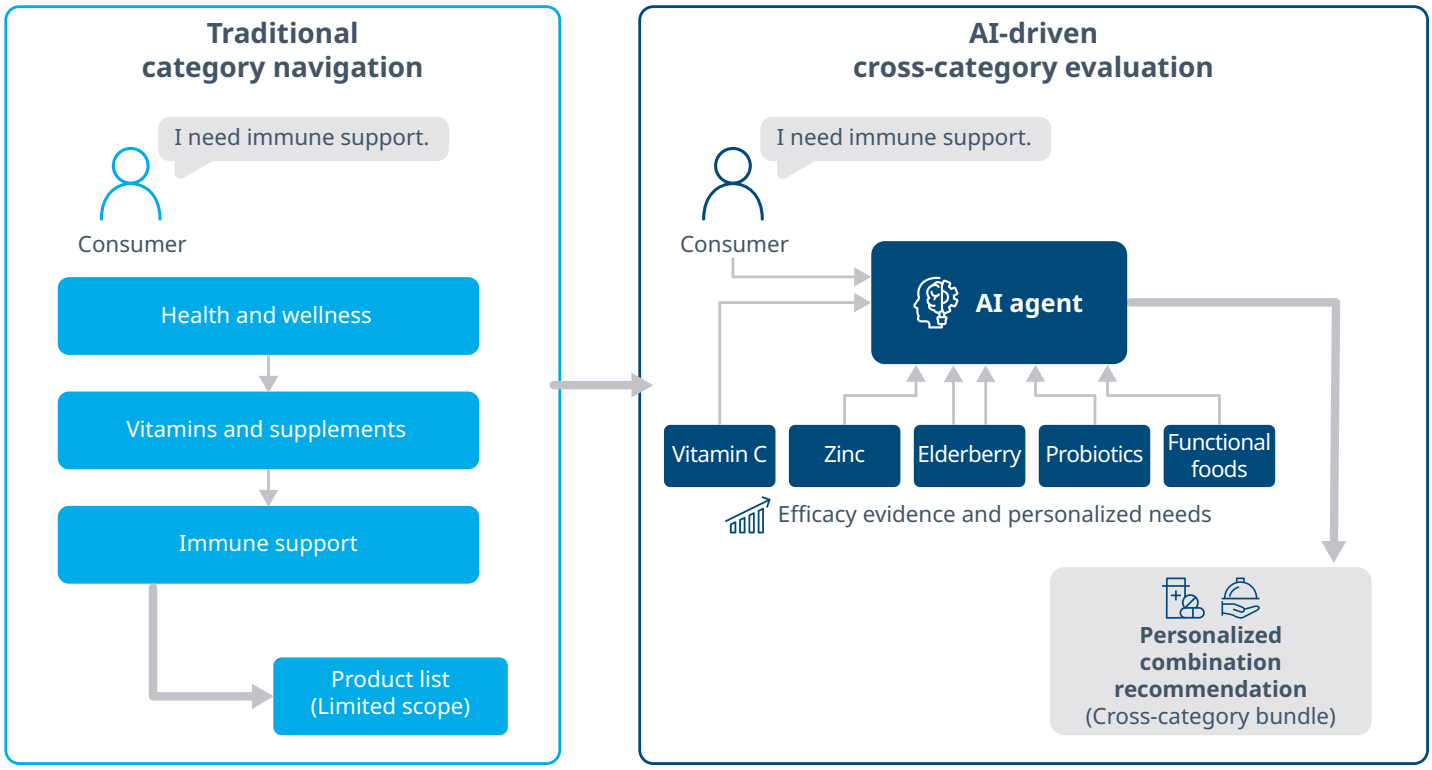
Figure 5: The new role of e-commerce — from online shelves to intelligent intermediary



AI adjusts products and purchase frequency over time base on new data.

A different, but equally likely scenario is that the role of traditional e-commerce categories and navigation could diminish as AI agents retrieve products based on functional requirements rather than taxonomical browsing. A consumer seeking immune support would not navigate through e.g., "Health & Wellness > Vitamins & Supplements > Immune Support" categories. Instead, their AI agent would evaluate products across multiple categories such as vitamin C, zinc, elderberry, probiotics, functional foods based on efficacy evidence and personalized needs, potentially recommending a combination that cuts across traditional product category boundaries (see **Figure 6**).

Figure 6: From traditional product navigation to AI-driven cross-category evaluation



These shifts could introduce a new layer of competition in the channel ecosystem. E-commerce platforms will compete not just for consumer traffic but for AI agent integration and preferential treatment in agent recommendation algorithms. We can anticipate platforms developing specialized APIs (Application Programming Interfaces) and data feeds optimized for AI agent consumption, offering incentives for agents to prioritize their inventory, and creating verification systems that signal trust and reliability to AI decision-making systems.

Subscription models could likely proliferate and become more dynamic, with AI agents managing adaptive subscriptions that adjust frequency, formulations, and quantities based on real-time health data and changing needs. For example, when an individual's AI health agent detects the person is in the midst of a high stress period thanks to its access to that person's wearables data and past incidences, it would automatically adjust that person's supplement regimen before adjusting back to the norm during periods of optimal wellness.

Reimagining advertising in an AI-curated world

The advertising industry's traditional playbook for consumer health products which is crafted around awareness building, consideration nurturing, and purchase conversion faces existential disruption as soon as AI agents assume gatekeeper roles in the consumer journey. When purchase decisions are increasingly delegated to AI intermediaries that evaluate products based on objective criteria rather than emotional resonance, the fundamental mechanisms of advertising influence must be reconceived. Advertisements will become interactive dialogues.

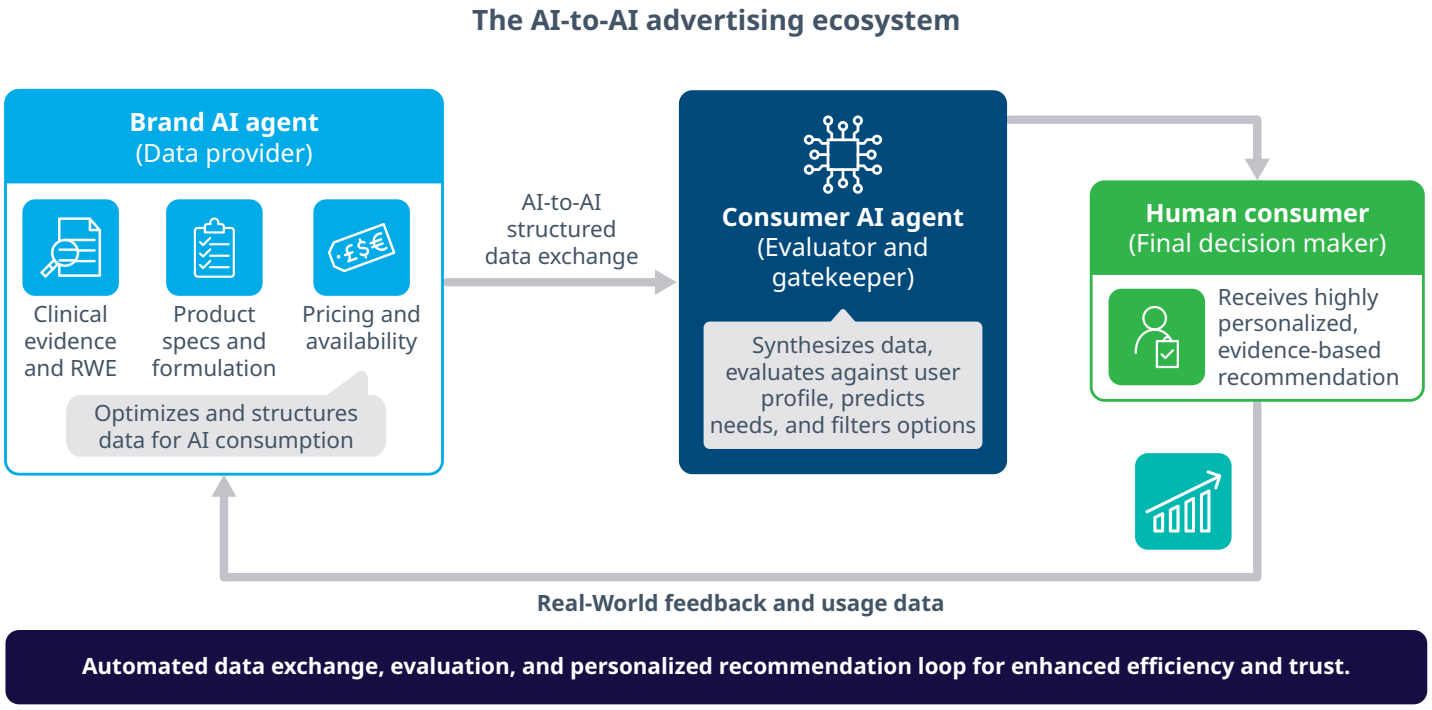
But how could this manifest in market? First, we would see the rise of what might be termed "AI-to-AI marketing," where brands communicate primarily with AI agents rather than end consumers. This would require a radically different content strategy focused on structured product information, clinical data and RWE summaries, comparative advantage documentation, and standardized data formats that AI systems can efficiently process and integrate into decision-making frameworks.

AI agents will also be able to interpret visual storytelling to ensure marketing aligns with consumer preferences and emotional states. They will leverage Convolutional Neural Networks (CNNs) — AI systems specialized for analyzing visual data by detecting patterns in images — and advanced vision models to analyze product images and videos. For example, an AI agent could detect that a video conveys "luxury" through imagery and tone, then match it to consumers who value premium experiences. Marketing teams will need to develop expertise in prompt engineering and AI reasoning patterns, understanding how AI agents will evaluate trade-offs, weight evidence, and form recommendations.

Equally critical is the integration of consumer generated sentiment into these agent workflows. AI agents will continuously ingest and normalize reviews, social posts, forums, and support transcripts, applying aspect based sentiment analysis to isolate specific attributes (e.g., taste, packaging, delivery) and the intensity of emotions. They will reconcile these signals with the clinical evidence and real world data information available to support products to calibrate recommendations and creative variants.

When negative sentiment spikes — such as complaints about delayed shipping or side effects — AI agents adjust by suppressing certain recommendation paths. Conversely, strong positive sentiment can trigger strategies like look-alike targeting, where AI identifies new customers who share similar traits with your most satisfied consumers, and co-created testimonials, which use authentic customer feedback to generate personalized, trust-building content. This real-time sentiment layer serves two roles: it provides structured signals that influence how AI agents rank marketing actions, and it drives consumer-facing personalization to keep messages empathetic, transparent, and aligned with real customer experiences (see **Figure 7**).

Figure 7: A possible AI-to-AI advertising ecosystem



Simultaneously, the personalization of consumer-facing content could reach unprecedented levels of sophistication. When AI agents do present marketing messages to consumers (whether for products requiring conscious decision-making or to build trust in recommendations) these messages will be dynamically generated to address the specific concerns, values, and context of that individual at that moment.

For example, on a Sunday evening, a health-conscious mother in her forties opens the AI health companion and searches for specific probiotic products to support her family. The AI knows she cares about mood, stress, and her children's wellbeing, so the product page she sees highlights the gut–brain connection, data on reducing school absences, and gentle formulations suitable for kids, all written in calm, reassuring language. On that same night, a twenty-something fitness enthusiast looks at the very same probiotic category through a training app. For him, the AI automatically generates messaging about improved recovery, reduced gastrointestinal discomfort during long runs, and emerging research on microbiome support for performance, framed with charts, workout tips, and links to sports nutrition studies.

The measurement and attribution models that have defined digital advertising would also require fundamental restructuring. Traditional metrics like click-through rates, conversion rates, and customer acquisition costs become less meaningful when AI agents are conducting the research and making recommendations outside of trackable advertising touchpoints. Instead, brands would need to develop new frameworks for measuring AI agent recommendation rates, share of agent-mediated purchases, and sentiment analysis of how AI systems characterize their products in consumer interactions.

Consider the evolution of influencer marketing in this context. Rather than contracting with human influencers to create sponsored content for social media platforms, brands may instead need to cultivate relationships with the foundation models and AI platforms that power consumer health advisors. This raises fascinating

questions about transparency, disclosure, and the potential for a new form of AI system "bias" toward brands that provide superior data access or integration partnerships. Regulatory frameworks would need to evolve to address whether and how such arrangements should be disclosed to consumers.

The creative function within marketing organizations would not become obsolete but could transform significantly. Creative talent would be needed to develop compelling narratives and evidence presentations that would resonate with AI evaluation criteria, to craft the underlying content that AI systems draw upon when explaining recommendations to consumers, and to design experiences for those remaining touchpoints where consumers interact directly with brand content. The skills required would blend traditional creative storytelling with data science, prompt engineering, and an understanding of AI reasoning patterns.

Evidence, transparency, and the new currency of trust

In an AI-mediated marketplace, evidence-based validation would become the fundamental currency of competitive advantage. AI agents, designed to optimize for consumer outcomes rather than marketing persuasion, would demand unprecedented levels of clinical and RWE substantiation, ingredient transparency, and manufacturing quality documentation. This shift would elevate the importance of scientific rigor and create both opportunities and challenges for consumer health brands.

A lack of appropriate clinical and RWE across claims categories would be a failing in the eyes of AI agents capable of detecting evidence gaps and tasked with a mission to compare products based on robust efficacy data. Brands that have invested in high-quality clinical research and proper RWE would find their products preferentially recommended, while those relying primarily on marketing narrative without substantiation would struggle to gain AI agent endorsement.

Industry should anticipate the emergence of new forms of evidence presentation specifically designed for AI consumption. This might include machine-readable clinical study and RWE summaries, standardized efficacy scoring systems, structured adverse event databases, and comprehensive ingredient interaction matrices. Companies that proactively develop these assets and make them accessible to AI systems could gain significant competitive advantages. We may also see the rise of specialized third-party verification services that audit and certify product claims for AI agent consumption, creating a new infrastructure layer in the consumer health ecosystem.

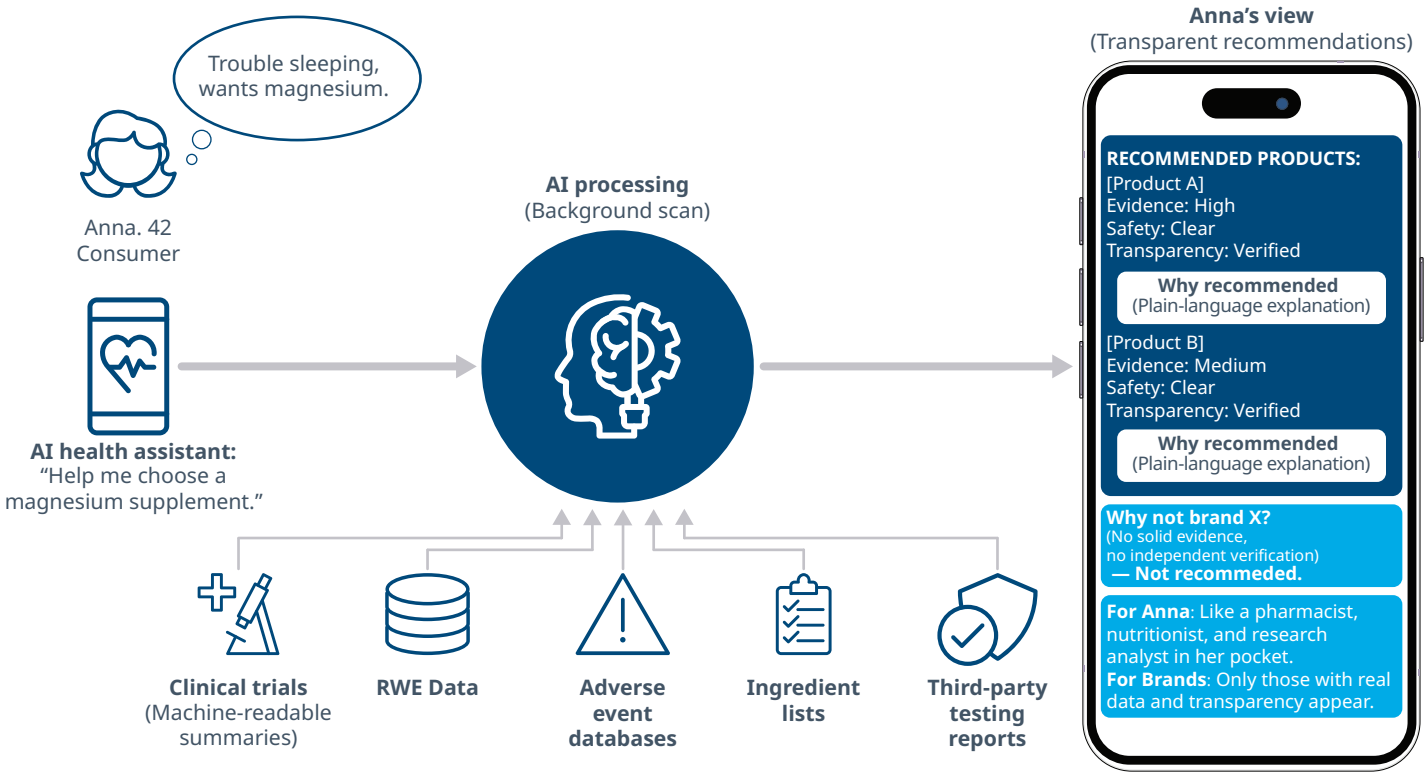
Transparency regarding formulations, sourcing, manufacturing processes, and supply chain integrity will become table stakes for AI recommendation. When an AI agent can instantaneously compare, for example, the bioavailability of different magnesium forms, the third-party testing credentials of competing brands, and the sustainability practices of manufacturers consumers will expect — and AI agents will demand — complete transparency. Brands that have historically competed on marketing rather than formulation excellence will need to fundamentally reinvest in product quality or risk being filtered out by AI recommendation engines.

A typical scenario could look like this:
Anna a 42 year old female consumer, has trouble sleeping and wants to try magnesium. Instead of scrolling through ads and influencer posts, she asks her trusted AI health assistant: "Help me choose a magnesium supplement for sleep." The AI pulls in her health data and medications, then scans hundreds of products in the background. It reads machine-readable clinical trial summaries, RWE data, adverse event databases, ingredient lists, and third-party testing reports.

The result which Anna sees is not marketing language but a short list of products, each with clear "evidence," "safety," and "transparency" scores, plus a one-page, plain-language explanation of why it is recommended: the type of magnesium, the dose, the quality of the trials, how real users reacted, and any interaction risks.

When she asks, "Why not Brand X from Instagram?" the AI explains that there is no solid evidence for its sleep claim and no independent quality verification, so it is not recommended. For Anna, it feels like having a pharmacist, nutritionist, and research analyst in her pocket. For brands, it means only those with real data, transparent sourcing, and audited claims consistently appear on her screen, while products built mainly on marketing narratives quietly disappear from her choices (see **Figure 8**).

Figure 8: Finding the best product for a consumer not knowing all the facts



The democratization of expertise through AI also means that the gap between professional-grade and consumer-grade product evaluation would narrow significantly. AI health advisors could bring pharmacist-level knowledge of drug interactions, nutritionist-level understanding of nutrient synergies, and research-level access to clinical literature to every consumer interaction. This would elevate the entire market and create opportunities for sophisticated brands to differentiate based on nuances such as specific delivery mechanisms, clinically validated dosing or ingredient combinations. These would have been lost on typical consumers but are easily evaluated by AI systems.

Navigating the regulatory frontier: Compliance in an AI-first world

The regulatory landscape for consumer health products would face profound pressure to evolve if AI agents became primary sources of product recommendations and health guidance. Current regulatory frameworks, designed for a world of human decision-making and direct manufacturer-to-consumer communication, are poorly equipped to address the complexities introduced by AI intermediaries that synthesize information from multiple sources and provide personalized health guidance at scale.

Several regulatory challenges are likely to emerge that demand proactive attention from industry stakeholders and policymakers:

1. Questions of liability and accountability when AI agents make product recommendations that lead to adverse outcomes. If a consumer experiences a negative reaction to an OTC drug or food supplement recommended by their AI health advisor, is the liability with the product manufacturer, the AI platform provider, the data sources the AI relied upon, or some combination thereof? The existing regulatory framework provides limited guidance for these scenarios, and clarity will be essential for the ecosystem to develop responsibly.

2. The distinction between regulated health advice and product information becomes increasingly blurred when AI agents provide personalized health assessments and recommend specific interventions. We must also recognize that, in the very near future, AI systems could potentially reach levels of knowledge and artificial intelligence that are difficult to even imagine today. In many jurisdictions, providing individualized health guidance constitutes medical advice requiring a medical licensee, yet AI agents could routinely perform functions that appear to offer clinical advice. Regulatory bodies would need to establish clear boundaries around what AI-powered health guidance is permissible for consumer health products versus what requires medical professional oversight.

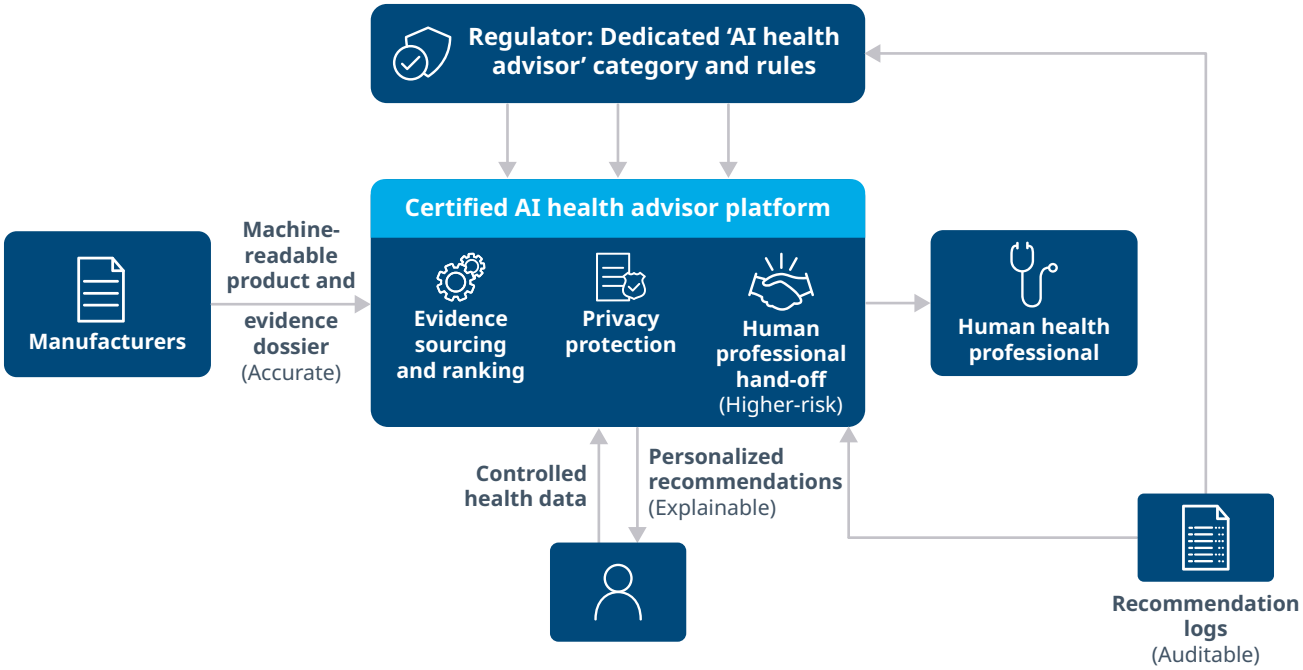
3. Data privacy and health information protection take on heightened importance as AI agents would need to collect and process extensive personal health data to deliver personalized recommendations. The integration of information from wearables, purchase history, reported symptoms, genetic data, and other sources creates comprehensive health profiles that existing privacy regulations may inadequately protect. Consumer health companies integrating with or developing AI agent technologies must proactively address data governance, consent mechanisms, and security architectures that protect sensitive health information while enabling personalized functionality.

4. Advertising and promotional claim regulations also would require substantial reconsideration. When AI agents dynamically generate product descriptions and benefit claims based on synthesized information from clinical literature, manufacturer data, and user reviews, how should regulatory compliance be assessed? The current model of pre-clearing specific marketing claims becomes impractical when the "marketing" is a unique AI-generated response for each consumer interaction. Regulatory frameworks may need to shift toward platform certification and algorithmic transparency requirements rather than content-by-content review.

In this scenario, regulators could create a new, dedicated "AI Health Advisor" category with clear rules for any system that recommends OTC drugs or supplements. Platforms must be certified before use, showing regulators how they source evidence, rank products, protect privacy, and hand off higher-risk questions to human professionals. Liability is shared: manufacturers are responsible for accurate, machine-readable product and evidence dossiers, while AI platforms are responsible for how they interpret that data and personalize recommendations.

Every recommendation is logged so that, if something goes wrong, regulators can see exactly which information and rules were used. Data protection rules are tightened so consumers can see and control which health data feeds into the AI, and breaches are treated as serious health incidents. Instead of approving individual ads, regulators focus on certifying and auditing the AI engines themselves, requiring explanations for why a product was recommended and reserving the right to suspend systems that consistently produce misleading or unsafe guidance. This would be a quantum leap around how consumer health products would be regulated. The only thing that is clear is that the advancements in AI developments and its usage happen much faster than any regulatory system (see **Figure 9**).

Figure 9: A potential approach for the regulation of AI health advisors



Shared liability: Manufacturer (data accuracy) | AI (interpretation) | Tight data protection | Regulators audit engines, not ads | AI pace >> regulatory adaptation.

To address these challenges, forward-thinking companies should engage proactively with regulatory bodies, industry associations, and policy makers to help shape frameworks that protect consumers while enabling innovation. This includes participating in pilot programs, contributing to guidance development, and investing in compliance capabilities that anticipate rather than react to regulatory evolution. Companies that position themselves as responsible stewards of AI-powered health guidance will build trust with both consumers and regulators while shaping favorable operating environments.

Ethical considerations and the democratization challenge in AI-mediated consumer health

As AI agents could become central to consumer health decision-making, ethical considerations must be considered. Fairness and equity in AI recommendations are paramount since any algorithmic bias could accidentally disadvantage particular groups of consumers or further health disparities. To manage this, companies would need to be transparent about how AI systems make decisions, explain to consumers clearly, and put in place robust mechanisms through which mistakes and unintended consequences can be addressed.

More importantly, while the efficiency of AI-mediated health guidance could lead to better outcomes for many, there is a risk that these changes might deepen the digital health divide.

The envisioned scenarios featured in this paper often rely on connected ecosystems of wearables, continuous data monitoring, and subscription-based services that may be beyond the financial capability of lower-income demographics. If the most effective forms of preventative care and personalized product curation become the exclusive domain of the technologically

privileged, then consumer health brands run the risk of alienating a considerable portion of the population.

This means that a strategic goal should be equitable access to AI-powered health guidance, with no new digital divide in which only certain populations have taken advantage of advanced technologies. Innovations need to be focused not just on “AI-to-AI” communication but also on how lightweight, accessible agent interfaces deploy high-quality, evidence-based guidance using basic mobile platforms or community health kiosks.

Ultimately, by embedding ethical principles into AI development and deployment, industry leaders could promote trust, protect consumer well-being, and contribute to a more inclusive future for consumer health - ensuring that the AI health revolution acts as a bridge to wellness rather than a barrier.

Is there a need to balance agentic efficiency with human experience?

Despite the revolutionary promise of AI automation, the industry must recognize that pure agentic efficiency will not satisfy all consumer needs, especially where the shopping experience itself holds value. The act of shopping in physical spaces carries intrinsic merits for many consumers that extends beyond functional product acquisition. Browsing pharmacy aisles or exploring wellness product displays represents a form of self-care, a tangible expression of health investment, and an opportunity for unanticipated discovery that consumers may be reluctant to fully delegate to algorithms.

The sensory experience of evaluating packaging, reading product narratives, and making conscious selections provides psychological benefits that purely automated purchasing cannot replicate. Furthermore, certain health and wellness purchases carry emotional dimensions where consumers derive satisfaction from the research process, the sense of agency in decision-making, and the act of investing time and attention in their well-being journey.

Smart brands would therefore need to design for a hybrid future that accommodates both efficiency-driven agentic purchasing for routine replenishment and experience-driven human engagement for categories where the shopping journey itself holds value. This might manifest as curated discovery experiences that AI agents facilitate, immersive retail environments that blend digital intelligence with physical exploration, or premium product lines positioned specifically for conscious, experiential selection rather than automated recommendation.

Companies that successfully balance algorithmic efficiency with experiential richness would capture both the growing segment of delegation-preferring consumers and those who resist fully outsourcing their health product decisions to AI intermediaries. In doing so, they will protect the human, emotional, and relational dimensions of self-care that underpin long-term brand loyalty.

Strategic imperatives for industry leaders

The convergence of AI agents and foundation models with consumer health would represent not merely a technological evolution but a fundamental restructuring of industry dynamics. The companies that thrive in this new landscape will share several characteristics that current leaders should cultivate deliberately (see **Figure 10**).

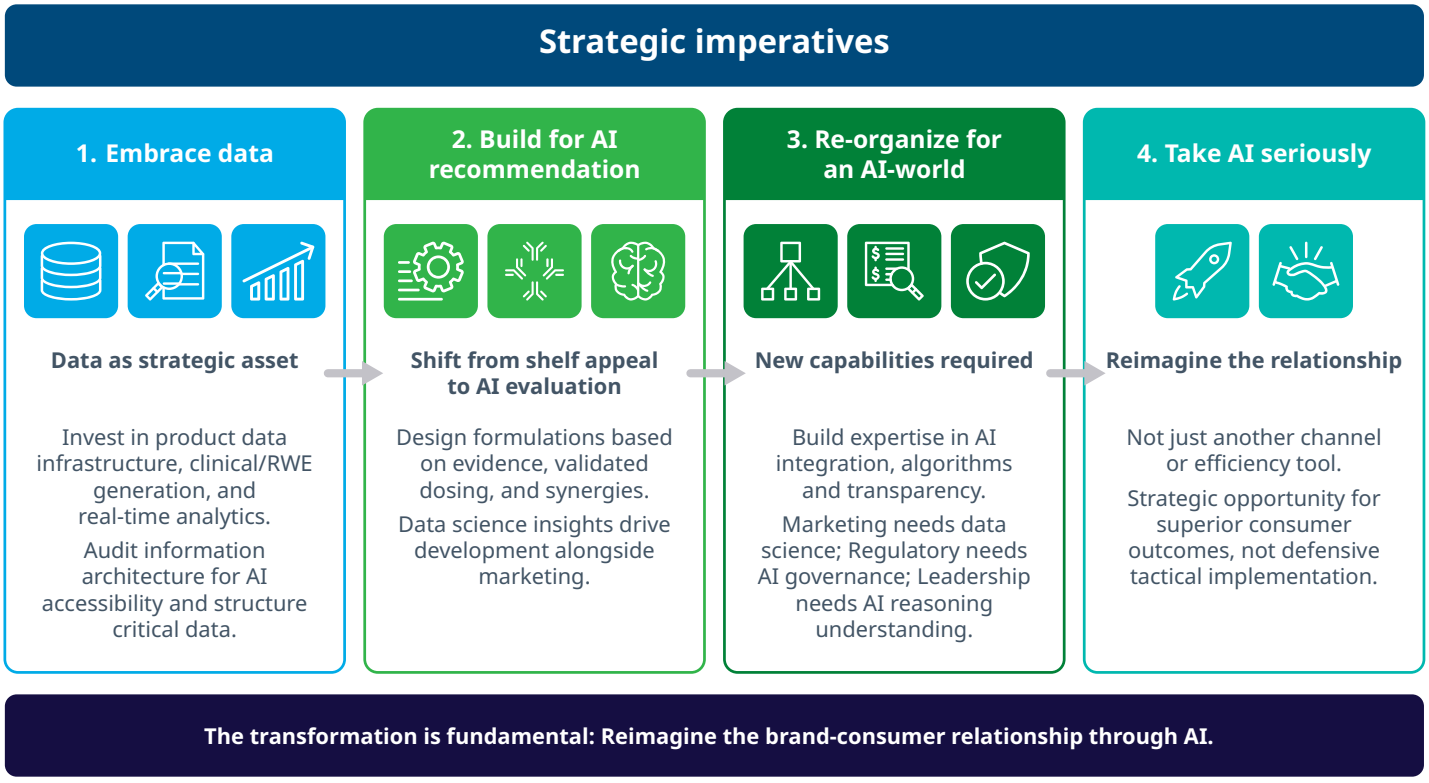
1. **Embrace Data**
   Successful organizations would need to embrace data as a core strategic asset with the same intensity they have historically reserved for brand equity. This means investing in comprehensive product data infrastructure, clinical and RWE generation, and real-time performance analytics that enable both AI integration and continuous optimization. Companies should audit their current information architectures through the lens of AI accessibility, identifying gaps where critical product attributes, efficacy data, or safety information exists in unstructured formats that AI agents cannot efficiently process.

2. **Build for AI recommendation**
   Building for AI recommendation would require a fundamental shift in product development philosophy. Rather than optimizing products primarily for shelf appeal, packaging impact, or broad market demographics, development processes should incorporate AI evaluation frameworks from inception. This would mean designing formulations based on evidence-based ingredient selection, validated dosing, and documented synergies that AI agents will identify as differentiating factors. Marketing input into product development should be complemented or potentially superseded by data science insights about what drives AI recommendation algorithms.

3. **Re-organize for an AI-world**
   The organizational capabilities required for success would differ substantially from those that defined competitive advantage in the pre-AI era. Companies would need to build or acquire expertise in AI integration, prompt engineering, algorithmic transparency, and machine learning systems. Marketing teams would require data science capabilities alongside creative skills. Regulatory and compliance functions will need to develop fluency in AI governance and algorithmic accountability frameworks. Executive leadership would need to understand not just consumer psychology but also AI reasoning patterns and decision architectures.

4. **Take AI seriously**
   Perhaps most critically, industry leaders should resist the temptation to view AI agents as simply another marketing channel or incremental efficiency tool. The transformation underway is not about doing existing activities more efficiently but about reimagining the fundamental relationship between consumer health brands and the consumers they serve. Companies that approach AI integration as a defensive necessity or tactical implementation will likely find themselves outmaneuvered by competitors who recognize it as a strategic opportunity to deliver genuinely superior consumer outcomes.

Figure 10: Strategic imperatives for an AI-driven future



Conclusion: From disruption to opportunity

The AI-powered transformation of consumer health discovery, evaluation, and purchase could represent perhaps the most significant industry inflection point since the category's emergence. While the pace and precise trajectory of change remain uncertain, the direction is clear: AI agents and foundation models could fundamentally reshape how consumers engage with health products, how brands compete for recommendation, and how value is created and captured throughout the ecosystem.

For industry stakeholders, this transformation presents both existential risks and extraordinary opportunities. Companies anchored to legacy models of brand building through emotional marketing and broad demographic targeting could struggle as AI agents prioritize objective efficacy and personalized fit. However, organizations that embrace evidence-based product development, radical transparency, and AI-native engagement strategies could reach consumers with unprecedented relevance and effectiveness.

The winners in this new landscape will be those who recognize that AI agents are not obstacles to be circumvented but partners in delivering better consumer outcomes. By providing the evidence, transparency, and product quality that AI systems will demand, consumer health companies have the opportunity to fulfill the health optimization promise that the sector has long aspired to deliver.

The journey ahead requires courage, investment, and a willingness to challenge assumptions that have defined the industry for decades. But for leaders prepared to navigate this transformation thoughtfully, the AI-powered future of consumer health offers the opportunity to build stronger brands, more loyal consumer relationships, and more defensible competitive positions than ever before possible. The question is not whether AI will transform consumer health, but which companies will lead that transformation and which will be transformed by it.

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Dr. Volker Spitzer has 30+ years of R&D experience spanning the consumer health sector, ingredients industry, and academia. Beginning his career as a professor in pharmaceutical sciences, he ascended to global positions encompassing R&D, innovation, licensing/M&A, and medical marketing at firms like Roche, DSM Nutritional Products, and Bayer Consumer Health. Since October 2017, Volker has been affiliated with IQVIA Consumer Health, serving as the Vice President for Global R&D and RWE Services. His purview primarily includes clinical research, real world evidence, virtual trials, and the burgeoning field of digital health. He has penned over 80 scientific publications, whitepapers and text books centered on science and innovation. Passionate about the unfolding digital revolution, Volker eagerly anticipates its transformative implications for consumer health and R&D.

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Dr. Stephanie Krammer-Lukas is a recognized expert in R&D and innovation in the life sciences, with a particular focus on medicine and nutrition. With more than two decades of experience, she is a trusted advisor to clients in the nutrition and dietary supplement industries. Her career spans companies such as Roche Vitamins, DSM Nutritional Products and Boehringer Ingelheim, where she has excelled in roles ranging from veterinary assistant to global R&D Center Head and Senior Product Manager. In her current role as Director of Global Consumer Health RWE and R&D Services at IQVIA Consumer Health, Dr Krammer-Lukas supports the R&D and RWE service offerings. Her role involves maintaining and strengthening relationships with a global client base and she is invested in leading R&D and innovation projects. Her efforts are focused on collaborating with customers to cultivate breakthrough ideas for the consumer health market.

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Formerly editor of OTC bulletin — the business newsletter for the consumer healthcare industry and since October 2017 a part of the Informa group — Matt has over 15 years of experience covering all aspects of the consumer healthcare market from mergers and acquisitions to regulatory developments. Matt is now responsible for content development and global content strategy at IQVIA Consumer Health.

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