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The Medicalization of Beauty: Navigating the Future Through a Medical Lens

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I. Abstract

Embarking on a “longevity journey,” today’s consumers are proactively shaping their futures by embracing behavioral changes and seeking preventive, scientific solutions to look and feel better longer. Driven by a desire to not just extend lifespan but also enhance health span, the period of life spent looking and feeling good, individuals are increasingly prioritizing wellness at every stage of aging. Therefore, an individual’s biological age, the age in which their body functions, is becoming as important as chronological age, how old a person actually is. Indeed, according to Jacob Peters, founder and CEO of health preventive care platform Superpower, “biological age is becoming a new form of identity” (Scott, 2025). This evolving perspective on aging and wellness signifies a profound shift in the consumer psyche, which now turns to biological interventions as the solution to aging concerns. This goes beyond the mere pursuit of longevity and is fueling a growing demand for proactive, bio-tech based strategies that blur the lines between beauty and medicine, thereby ushering an evolution in the trajectories of the wellness and beauty industries. With the shift from “clean” to “clinical” to “medical” underway, beauty companies must rethink topical cosmetics in order to compete in this growing market through (i) the products that are launched, (ii) how technology and innovation are leveraged across a company’s portfolio, and (iii) the places where those products are sold.

Consumer desire for medicalized beauty did not happen overnight. Factors such as aging populations, lingering pandemic effects, increased access to educational resources, and technological advancements were catalysts for this change. As seen with clean beauty over the past several years, inconsistencies in the definition and the standards of “clean” led to consumer mistrust. This mistrust was further exacerbated by the varying and unreliable information disseminated through social media. Seeking information from trusted sources and data from which to draw their own conclusions, consumers look to clinical testing and professional endorsement before selecting beauty products. In fact, over half of beauty buyers prioritize clinically proven efficacy when making this selection (McKinsey & Company, 2024). Additionally, doctor recommendations rank as the third most influential factor in wellness purchases (McKinsey & Company, 2024). The market is also seeing the proliferation of technological advancements, with a link to the medical or pharmaceutical industries, which is shifting the beauty wellness market from “clinical” to “medical.” This includes tools like biohacking technology, smart wearables powered by AI, cellular optimization, and treatments such as GLP-1s - medications originally designed for diabetes that are now used to support weight management - and NAD+ therapy, which helps boost energy at the cellular level and supports healthy aging, all aimed at enhancing beauty from the inside out. The medicalization of beauty appears to be more than just a trend, but a more permanent shift in consumer behavior.

This research aims to provide a comprehensive analysis of the medicalization of beauty, examining its origins, evolution, and future trajectory. It will also highlight some of the challenges faced by traditional beauty companies as they seek to compete in this complex market, including new competitors, regulatory challenges, capability limitations, and large capital investments. Nevertheless, by understanding the dynamic convergence of beauty, wellness, and medicine, clear opportunities for the beauty industry emerge, not only for effectively navigating those challenges, but also to entirely revolutionize topical cosmetics and succeed in this growing market.

A. A Medicalized Beauty Ecosystem Within the Corporate Core.

In the rapidly evolving beauty landscape, a centralized medicalized beauty unit—a center of excellence—is crucial for driving innovation and building the foundation for sustainable growth. This unit will house cross-functional teams of experts, fostering collaboration and leveraging strategic partnerships to unlock new category potential. By spearheading research and development, overseeing portfolio expansion through strategic mergers & acquisitions (M&A), and implementing robust clinical training beyond what is traditionally done for cosmetics today, this unit will transform the retail experience, creating hybrid health-beauty destinations and positioning beauty conglomerates as leaders in the beauty-health convergence. This structure will also help manage costs for multi-brand companies since expensive technology and innovation can be leveraged across brands.

B. Portfolio Management: Expand Through Strategy, Not Saturation.

In the rapidly converging worlds of beauty and health, strategic portfolio management is no longer a supporting tactic, but the very engine of future growth. Consumers are not simply seeking beauty products; they are demanding holistic biological solutions and experiences grounded in breakthrough technology. This paradigm shift presents an unprecedented opportunity for beauty companies to redefine their role, evolving from cosmetics marketers to architects of comprehensive beauty-health ecosystems. This requires a decisive and proactive approach to portfolio management, prioritizing strategic acquisitions, collaborations, and investments in biotech, medicine, and pharmaceuticals. Favorable conditions, including decreased biopharma acquisition costs and expiring drug patents, create a fertile ground for strategic investments by beauty companies, particularly in smaller, agile medical or pharmaceutical companies with disruptive technologies and global potential. This strategic vision, exemplified by Amazon’s acquisition of One Medical and Sanofi’s development of an mRNA acne vaccine, is not simply a trend response; it is the blueprint for long-term leadership and enduring success in the dynamic beauty landscape of tomorrow.

C. Product Innovation: Build for Efficacy, Formulate for Credibility.

To effectively compete in this market, beauty companies must also re-think product offerings beyond traditional cosmetics. This involves drawing inspiration and expertise from the medical field and new ingredients, in addition to prioritizing scientifically backed product development. Claims aren’t just supporting messages, instead they are driving purchases through proof of diagnostic data, clinical trials, and expert validation. Beauty companies should invest in breakthrough claims and testing that take a cue from the medical or pharmaceutical industries, such as complementing or comparing their effects to those of procedures or medical aesthetic treatments. Beauty companies should move away from traditional cosmetic packaging components and should invest in innovative packaging that does not merely look clinical, but is also functional. Brands like Mantle, with its dedicated longevity line, exemplify this forward-thinking approach (FIT CFMM Sweden Field Study, 2025). Additionally, South Korean brand Medicube is a prime example of disruptive innovation, as it offers a stabilized capsule-in-gel vitamin C product that contains niacinamide and ascorbic acid while the gel boasts ferulic acid and vitamin E (Li, 2025). “The next 20 to 30 years will see AI-driven skincare, peptide technology, and gene-based interventions take centre stage,” says Dr. Nyla Raja, cosmetic doctor, dermatologist, and founder of Dr. Nyla Medispa (Scott, 2025). Focusing on advanced product innovation rooted in biological science is key to lead in this new era.

D. Personalized Omni Experience: From Diagnosis to Delivery.

Post-pandemic consumers demand a seamless and elevated omnichannel experience, reaffirming the importance of physical retail alongside digital channels. This necessitates a reimagining of the in-person experience, prioritizing convenience, speed, personalization, and tapping into natural synergies between beauty and medicine. Disruptive models like Tia Health and HerMD demonstrate this shift, offering integrated health care solutions within a one-stop-shop environment, a concept ripe for adaptation within the beauty sector. Furthermore, integrating technologies like virtual try-on tools and wearables enhances the consumer journey and provides valuable data-driven insights. Closely analyzing these evolving retail landscapes, particularly the convergence of beauty and wellness within innovative spaces, is crucial for brands seeking to thrive. Ultimately, success hinges on embracing a flexible and forward-thinking approach to omnichannel retailing, continually optimizing and integrating the consumer experience across all touchpoints.

II. Introduction

Beauty is evolving. Medicine is the future. The medicalization of beauty, where consumers increasingly view beauty concerns as medical or medical-adjacent, is reshaping the industry by blending aesthetics with medical science and expanding the traditional roles of estheticians, dermatologists, and medical professionals. As consumers gravitate toward science-backed, medically driven beauty solutions, the beauty industry must adapt with new approaches to innovation while navigating barriers to entry, inclusive of regulatory complexities and threats from non-beauty competitors.

Over the past century, life expectancy has more than doubled (Dattani et al., 2023). In the United States, people are now living longer and, as a result, staying in the workforce longer. The number of U.S. employees age 65 and over increased by more than 33% percent over the past 10 years (The Seniors Trust, 2025). People are also in the dating pool longer since, on average, people are getting married at an older age and divorce rates are rising. Therefore, the age that people are expected to look and feel is increasingly misaligned with their chronological age. As a result, consumers today are obsessed with the concept of longevity, or looking and feeling younger for longer. People today actually feel 20% younger than their real age (Rubin & Berntsen, 2006). Beauty brands have jumped on this trend, with a multitude of longevity-based products entering the market over the past couple of years and more in the launch pipeline. The current consumer trend of longevity, however, is not just a trend or based on a new concept. It is just a new incarnation of looking to wellness, or the holistic, mind-body-appearance connection, to solve beauty concerns.

As consumer interest shifts from surface-level beauty to performance-based and longevity-focused care, the convergence of beauty and medicine becomes increasingly pronounced. Clinical claims and aesthetics-related procedures, ranging from injectables to prescription-strength topicals, are now normalized by social media, promoted by “dermfluencers,” and the proliferation of med-spas. The influence of social media has also democratized access to medical beauty narratives.

Consumers’ desire to look and feel good is not going anywhere; in fact, because of the aforementioned social forces, it will only intensify in the next decade. While today consumers

are looking to longevity to help solve their beauty concerns, it's important to uncover what they will look for in the upcoming years. Consumers are increasingly divided between prioritizing long-term skin and body health and opting for quick-fix beauty solutions. Longevity-focused consumers invest in skin health, metabolic function, and regenerative skin care through practices like biohacking, functional nutrition, and red-light therapy, demanding scientifically backed, holistic solutions. Conversely, others prioritize immediate aesthetic results, turning to interventions like Botox, fillers, and prescription weight-loss drugs, reflecting a cultural tension between long-term wellness and instant gratification. The future likely lies in a hybrid approach that combines longevity science with clinical interventions to address both lasting health and immediate aesthetic enhancements. Despite this tension, what both of these paths have in common is their reliance on science and medicine.

Beauty brands will have to participate in this space in order to compete and remain relevant. The brands that want to adapt to new consumer expectations will face significant barriers to entry, like new and unfamiliar competitors from the medical and pharmaceutical industries, as well as the need to adjust to how, where, and what products are sold. This research aims to provide the beauty industry with a roadmap of strategic recommendations on how beauty brands can effectively navigate these challenges and participate in the competitive medicalized beauty space.

III. Methodology

This research aimed to gain insights on the intersection between beauty and medicine and to provide strategic recommendations for the beauty industry to succeed in a rapidly evolving landscape where consumers are increasingly viewing beauty concerns through a medical lens. To address these key areas of focus, qualitative research, including expert interviews and extensive secondary research, was conducted. From a quantitative perspective, a consumer survey was launched to support secondary research. Lastly, an international field study was executed to better understand the global relevance of the topic.

This qualitative research initiative began with expert interviews designed to explore the growing convergence between beauty and medicine and how this evolving dynamic is shaping consumer behavior and corporate strategy. By engaging leaders from across the beauty, finance, and health care sectors, the research aimed to uncover the influence of clinical science, aesthetic innovation, and long-term health trends on shifting beauty norms, product development pipelines, and the broader future of personalization. In addition to these key areas of focus, the interviews also addressed the strategic role of M&A in this transformation—highlighting trends such as minority stake investments and the increasing participation of pharmaceutical and medical companies in the beauty space. Among those interviewed were industry leaders such as Wendy Liebman of WSL, Larissa Jensen of Circana, and Leslie Harris and Thomas Reedman of L'Oréal. Innovation and product development experts at L'Oréal, including Rachel Weiss, Jessica Chen, and Alesia Lanzo, were also interviewed. Additional perspectives were provided by Marissa Lepor of the Sage Group and Therese Rodriguez of Boll & Branch to gain insights into the state of portfolio management and M&A. Erika Sheyn of Guidepoint and Will Flaherty of Ro provided unique insights regarding the impact of aesthetics and pharmaceuticals in their respective businesses. An interview with doctor and founder of his own skincare brand, Dr.

Dennis Gross, was also conducted to gain insights on the innovation pipeline. Through these conversations, the project has begun to surface key insights into the opportunities and challenges companies face at this intersection of beauty and medicine.

To support and extend the insights gathered through primary interviews, a range of secondary sources were analyzed. These included expert-led industry reports, published case studies, previously conducted focus groups, and academic papers on relevant topics. These resources helped frame the interview questions and identified key gaps that were explored further through ongoing primary research.

Parallel to the qualitative work, a quantitative research study was conducted to measure consumer awareness, attitudes, and behaviors related to the medicalization of beauty. This study aimed to systematically assess how consumers perceive, adopt, and interact with innovations such as clinical skincare, prescription-based products, aesthetics and technology, and in-store beauty clinics. This was a U.S.-specific survey, in which we received 516 respondents to gain significant insights. Consequently, medical expertise becomes a more integral part of beauty branding and experience, this data will be crucial for brands, retailers, and health care providers looking to lead in this fast-evolving space.

Complementing the quantitative research, secondary data sources such as market reports, sales statistics, census data, and published analyses have been incorporated into the project. This foundation will also support the introductory section of the final presentation, ensuring a robust contextual understanding of the marketplace.

Finally, international field studies conducted across India, Finland, and Sweden offered valuable insights into the global landscape of the medicalization of beauty. In India, while Ayurveda, the traditional system of medicine, remains a dominant force, there is growing consumer interest in scientifically validated products. This shift is fueled by a rising presence of dermatologists, estheticians, and aesthetic procedures, though the category remains five to 10 years behind the United States. Local success stories, like Dr. Sheth's, a brand that fuses Ayurveda with clinical science, highlights the importance of cultural and scientific localization. At the same time, Bollywood, the Indian movie industry based in Mumbai, in addition to the wedding industry are helping drive this intersection forward. In Finland, medicalized beauty exists but is less prevalent than in the United States, with a national preference for minimalist, functional skincare. Finnish consumers are particularly engaged in biohacking and wellness tracking, with a popular sauna culture. Meanwhile, in Sweden, the intersection of medicine and beauty is more integrated, though still guided by values of sustainability and simplicity. Med-spas and clinics are more visible, and product innovation often channels scientific breakthroughs, such as jellyfish collagen and lactobionic acid, into skincare. These international insights will help shape the final product innovation recommendations in the capstone presentation.

Through these methods of research, key insights regarding the increasing intersection between beauty and medicine were collected, ultimately supporting our recommendation of a strategic framework with three key pillars, demonstrated through a consumer journey, that the beauty industry can utilize to succeed in this ever-evolving landscape.

IV. The Wellness Economy and Evolution

The pursuit of well-being, a fundamental human aspiration, has shaped civilizations since the beginning of time. From ancient healing traditions to cutting-edge scientific advancements, the concept of wellness has undergone a remarkable evolution, giving rise to the dynamic global industry today. In order to anticipate how the market is evolving, it's critical to understand all aspects of wellness, including the rich historical trajectory of the industry, its multifaceted definition, the key sectors driving its economic impact, the statistical landscape shaping its market dynamics, and the diverse forces influencing its trajectory.

The origins of wellness can be traced back to ancient civilizations that intuitively grasped the interconnectedness of mind, body, and environment. In India, the 5,000-year-old practice of Ayurveda, with its personalized approach to health incorporating diet, lifestyle, and herbal remedies, sought to achieve balance and prevent disease. Similarly, traditional Chinese medicine, emphasizing energy flow (Qi) and harmony, provided a holistic framework for understanding and maintaining well-being. Ancient Greece, with its focus on physical prowess showcased in the Olympic Games and philosophical schools promoting mental acuity, further contributed to the evolving concept of wellness. The Greek physician and philosopher Hippocrates, revered as the “father of medicine,” advocated for preventive care and a holistic view of the human body, establishing the bedrock of modern medical ethics. The Romans, renowned for their sophisticated public health systems, including public baths and aqueducts, recognized the vital role of environmental factors in overall health and well-being. These time-honored traditions, while distinct in their methods, shared a unifying principle: a proactive approach to cultivating health and preventing illness, rather than solely treating disease.

While the term “wellness” gained widespread acceptance in the mid-20th century, wellness continues to integrate ancient traditions with modern advancements, reflecting a growing consumer focus on holistic living (Figure 1). The 19th century witnessed the rise of alternative healing modalities like homeopathy and naturopathy, challenging conventional medical approaches and emphasizing the body's inherent self-healing capacity. People were starting to feel that a purely solution-driven approach to health was missing something. They began turning toward more natural and holistic approaches to healing, looking for ways to care for themselves that felt more complete. The 20th century saw wellness extend through diverse aspects of society. Corporate wellness programs emerged, acknowledging the connection between employee well-being and productivity. The fitness revolution of the 1970s and 80s, fueled by the aerobics craze and increasing awareness of exercise benefits, brought physical fitness into the mainstream. Simultaneously, the spa industry flourished, offering an array of treatments and services centered on relaxation, rejuvenation, and aesthetic enhancement. These developments collectively propelled wellness into the public consciousness, setting the stage for its exponential growth in the 21st century.



Figure 1: The evolution of wellness

Source: Global Wellness Institute. (n.d.). History of wellness. Global Wellness Institute.

<https://globalwellnessinstitute.org/what-is-wellness/history-of-wellness/>

Wellness in the modern context goes beyond the mere absence of illness; it represents an active, ongoing pursuit of optimal physical and mental well-being. It embraces a holistic perspective, recognizing the interconnectedness of various dimensions of life. The eight commonly recognized dimensions of wellness provide a comprehensive framework for understanding this complex concept: physical (exercise, nutrition, sleep), emotional (self-awareness, emotional regulation), occupational (workplace well-being, career fulfillment), spiritual (purpose and meaning), social (relationships, belonging), environmental (connection with nature, sustainable practices), intellectual (continuous learning, cognitive stimulation), and financial (security, stress management) (Stoewen, 2017). This multifaceted approach acknowledges that true well-being requires attention to all facets of life, fostering a balanced and fulfilling existence.

The Global Wellness Institute (GWI) defines the wellness economy as encompassing industries that empower consumers to integrate wellness into their daily lives (Global Wellness Institute, 2024). This broad definition reflects the pervasive influence of wellness across diverse sectors, contributing to its substantial economic impact. The GWI identifies 11 key sectors within this burgeoning economy: mental wellness, physical activity, wellness real estate, workplace wellness, wellness tourism, spa economy, thermal/mineral springs, healthy eating and nutrition, personal care and beauty, preventive and personalized medicine, and traditional and complementary medicine (Global Wellness Institute, 2024). These sectors represent the diverse

wellness landscape, spanning from mental health support and fitness activities to personalized medicine and beauty treatments.

The wellness market exhibits dynamic growth and regional variations. The United States currently dominates the global wellness market, valued at about \$2 trillion, a staggering 32% of the almost \$6.3 trillion global wellness economy (McClear, 2025), which is double the size of the second-largest market, China, at \$790 billion (Global Wellness Institute, 2024). This underscores the significant consumer spending power dedicated to wellness in the United States. Within the United States, the breakdown of the about \$2 trillion wellness economy in 2024 reveals key sector contributions: physical activity (\$339 billion), personal care and beauty (\$310 billion), healthy eating, nutrition and weight loss (\$289 billion), wellness tourism (\$259 billion), public health, prevention and personalized medicine (\$222 billion), wellness real estate (\$176 billion), mental wellness (\$87 billion), traditional and complementary medicine (\$82 billion), spas (\$26 billion), workplace wellness (\$18 billion), and thermal/mineral springs (\$1 billion) (Global Wellness Institute, 2024). These figures highlight the diverse range of wellness offerings and the substantial economic activity within each sector. Globally, the wellness economy is projected to experience robust growth at an annual rate of 7.3% from 2023–2028, indicating continued expansion and investment in this market.

The concept and implementation of wellness vary across different markets, reflecting cultural influences and regional priorities. While the United States leads in innovation and product diversity, India's wellness market is experiencing rapid growth fueled by renewed interest in traditional practices like Ayurveda and yoga, coupled with a growing middle class. The Nordic countries prioritize a holistic approach grounded in nature, simplicity, and mindfulness, emphasizing the interconnectedness of physical and mental well-being. Emerging trends indicate a polarized market, with high-tech, medically focused “hardcare” wellness coexisting alongside simpler, less intense “softcare” options. This polarization reflects the diverse needs and preferences of consumers seeking wellness solutions (CFMM International Field Studies, 2025).

The wellness economy is poised for continued expansion and transformation, driven by technological advancements, personalized approaches, and a growing emphasis on preventive care. Wearable devices, personalized medicine platforms, and artificial intelligence (AI) are revolutionizing how individuals manage their health and well-being, providing data-driven insights and personalized recommendations. The increasing integration of wellness into various facets of life, from workspaces to residential developments, reflects its growing importance in modern society. As consumers become more discerning and seek holistic solutions tailored to their unique needs, the wellness industry must adapt and innovate to meet these evolving demands. The future of wellness hinges on its ability to seamlessly blend ancient wisdom with modern science, creating a truly personalized approach to lifelong well-being.

V. Current State of Beauty and Wellness

In the United States, the wellness market has reached a value of \$2 trillion, growing at an annual rate of 5%–10% (McKinsey & Company, 2024). Within this rapidly expanding sector, appearance-related purchases—such as cosmetic procedures, hair care, and skincare products—

consistently rank as the most frequent across all age groups, surpassing categories like fitness, nutrition, sleep, and mindfulness. Amid this growth, consumers are increasingly demanding proof, not promises. Efficacy and scientific credibility have emerged as leading criteria when selecting wellness products, now ranking above previously valued markers like organic or natural ingredients.

A major development reshaping the beauty industry is the transition from clean to clinical, science-backed solutions. While clean beauty gained traction amid heightened environmental and ethical awareness, its lack of standardized definitions and reliance on retailer-specific certifications has led to growing consumer skepticism. For instance, the European Union bans over 1,300 ingredients from use in cosmetics, whereas the U.S. Food and Drug Administration (FDA) bans only 11 (Safronova, 2023).

As consumers become more informed and discerning, they increasingly favor products that are backed by measurable scientific data and focused on longevity. Fifty-two percent of U.S. consumers cite “clinical effectiveness” as a top purchasing driver, compared with just 20% who prioritize “clean or natural formulations” (McKinsey & Company, 2024). Additionally, over 60% of respondents agreed it’s “extremely” or “very” important to purchase longevity products, and 70% are planning to buy more products in the future (Pione & Shenai, 2024).

This shift is further reflected in the rapid growth of the dermocosmetics segment, products that bridge the gap between cosmetic appeal and dermatological efficacy. Dermocosmetics are formulated with active ingredients designed to support the treatment or care of various skin and hair conditions. The global dermocosmetics market is projected to grow from \$48 billion in 2025 to \$95 billion by 2032, reflecting a compound annual growth rate (CAGR) of 10% (Fortune Business Insights, 2025). Brands that establish trust through dermatologist partnerships and clinical validation are outperforming competitors. In fact, 63% of consumers report being more likely to trust beauty brands endorsed by medical professionals (Prime Matter Labs, 2024). This dynamic has fueled demand for advanced, physician-aligned products that address aging and holistic health needs.

Moreover, the post-pandemic emphasis on medical expertise gave rise to a new breed of online authority: the dermfluencer. As in-person office visits declined, many dermatologists expanded their digital presence to meet consumers where they were, on platforms like TikTok. There, they offered bite-size, accessible skincare advice and became prominent voices in what’s now known as DermTok. On TikTok, many educational videos on skincare and treatment options are shared by health care professionals, 13% of whom are board-certified dermatologists (Turk et al, 2024). These dermatologists gained massive followings by educating the public about skin conditions and demystifying aesthetic treatments. Their ability to quickly correct misinformation helped reshape the narrative around beauty, health, and wellness on social media. Notably, this visibility also led to a measurable increase in new patient visits, especially among individuals previously hesitant to engage with traditional dermatology. However, as brand sponsorships have become more common, the authenticity of dermfluencers is being questioned. Growing consumer awareness of paid endorsements might begin to erode trust in their recommendations.

Concurrently, the industry is witnessing a paradigm shift from reactive care to preventive and longevity-focused beauty practices. In fact, 80% of consumers are inclined toward a

preventive approach, preferring to maintain their appearance through consistent care rather than reactive measures (National Online Consumer Survey, 2025). Consumers are moving beyond short-term fixes, embracing long-term strategies rooted in biohacking, cellular optimization, and personalized medicine. Preventive Botox and advanced treatments such as GLP-1 and NAD+ therapies are becoming mainstream. For brands, staying relevant means innovating with products and services that align with this evolving philosophy of beauty—from the inside out.

Longevity clinics and personalized wellness programs are at the forefront of this transformation, offering tangible, science-driven solutions to extend both lifespan and healthspan. One example is Fountain Life, a science-backed longevity center powered by AI that seeks to extend members' healthspan through a foundation of functional medicine-based protocols leveraging a network of physicians and scientists (Fountain Life, 2025). These programs integrate precision diagnostics such as genetic testing, biofield therapies, and tailored nutrition protocols aimed at cellular repair and regeneration. Therapies like biofield frequency optimization, personalized hormone balancing, and energy-based detoxification are gaining attention for their potential to reverse aging-related damage and restore physiological equilibrium. As a result, ingredients traditionally associated with medical treatments are now being incorporated into beauty products, signaling a convergence of wellness, medicine, and aesthetics driven by the modern consumer's desire for both vitality and visible results.

VI. The Wellness Consumer

Globally, consumers are increasingly prioritizing wellness, driving demand for products and services that promote holistic well-being or health from the inside out. With 97% of people being concerned about aging (Scott, 2025) and adults over 40 years of age feeling 20% younger than their actual age (NIH, 2021), consumers are looking for solutions for longevity. This focus on overall well-being has led consumers to couple traditional beauty practices with changes to lifestyle habits such as improved diet and stress management. Consumers' desire for convenience and accessibility continues to transform the health and wellness retail landscape. Beauty rituals evolve to include more on-demand services, in-person clinics, at-home diagnostics, and professional treatments that minimize daily upkeep. Today's beauty consumer falls into one of three evolving categories:

A. Clinical Maximizers

The clinical maximizers are those who demand performance and precision, trusting diagnostics and data to drive personalized routines. Motivated by continuous self-improvement, these consumers use wearables and technology to track health and performance and tailor routines based on precise data. The clinical maximizer experiments with new beauty technologies for precise results (e.g., LED masks, microneedling devices) and looks for clinical brands (e.g., Curology, Musely) with hyperpersonalized benefits and proven efficacy backed by dermatologists. These consumers are the first to favor medical beauty solutions from cellular health to regenerative skincare. The idea of longevity and preserving youth should be measured through improved data.

B. Holistic Minimalists

The holistic minimalists are those who prioritize simplicity, leaning into nature, mindfulness, and low-tox rituals. This consumer looks to a clean, holistic lifestyle and more natural beauty solutions. Skeptical of medical interventions, the holistic minimalist focuses on supporting beauty through diet, mindful practices, and consciously choosing products low in toxins. Obsessive about ingredient labels, this consumer favors natural remedies, herbal supplements, and holistic practices like gua sha (a technique using a smooth-edged tool to boost circulation and relieve muscle tension) and acupuncture over injectables and laser treatments. They seek reassurance that chosen products and treatments align with their wellness values and actively seek education on natural alternatives to medicalized beauty.

C. Preventive Optimizers

The preventive optimizers are those that blend early intervention with wellness to preserve youth on their own terms, maintaining their appearance and health. Focused on preventing aging rather than reversing it, they embrace both medical and holistic beauty solutions. From Botox to collagen supplements and regular hydra-facials, the preventive optimizer actively seeks evidence-based approaches and readily adopts trending products and treatments. The dedication to youth preservation extends to a 10-step skincare routine, regular exercise, and the use of beauty tools like Nuface and gua sha, demonstrating a willingness to invest time and resources in their future-focused beauty regimen.

VII. Disruptive Innovations

Beauty is increasingly being approached from the inside out, targeting what you can and cannot see. Consumer comfort with clinical solutions to appearance has increased, backed by the rising interest in science-forward beauty like B12 shots, NAD+ IVs, and biofield therapies. Biohacking—defined as a DIY form of human enhancement that seeks to improve health, performance, or well-being by making small, strategic changes to habits and behaviors—has surged, encompassing practices like cold plunges, saunas, red-light therapy, and even stem cell transfusions (Rebecca LaMarca, 2025). Physical health biohacking includes cold therapy, where individuals immerse themselves in water below 60 degrees to boost immunity, combat depression, improve circulation, increase metabolism, and reduce inflammation and pain. Heat therapy, or thermotherapy, involves exposure to high temperatures to encourage relaxation, detoxify the body, improve sleep, and tone the skin. Red-light therapy, which uses specific wavelengths of light to energize cells and repair damaged tissue, delivers benefits such as healthier skin and hair, pain and inflammation reduction, and mood improvement through the stimulation of serotonin and other neurotransmitters.

These biohacking practices are becoming increasingly accessible through “spaces for transformation” like Othership, purpose-built wellness studios that blend physical, mental, and emotional therapies in a communal setting. These spaces aim to democratize advanced wellness techniques by offering guided sessions, workshops, and immersive experiences that help individuals integrate biohacking into their daily routines, making what was once niche or exclusive more approachable and experiential. In addition to physical therapies, age biohacking

targets cellular longevity and regeneration whereas technologies such as stem cell therapy and non-ablative laser treatments aim to combat cellular senescence, a state where cells permanently exit the cell cycle and stop dividing, but do not die. Brain biohacking focuses on cognitive enhancement through nootropics, or “smart drugs,” which improve memory, alertness, concentration, and energy; these range from prescription medications like Adderall and Ritalin to over-the-counter options such as caffeine, creatine, B vitamins, fish oil, and herbal supplements. Finally, NAD⁺ (nicotinamide adenine dinucleotide), a coenzyme essential to metabolism, DNA repair, and gene expression, is being used in supplement and injection form to slow aging, enhance cognitive function, reduce premature skin aging, and support overall metabolic health as part of a growing effort to preserve youthfulness. Collectively, these innovations underscore a powerful shift: Beauty and longevity are increasingly being targeted from within, reinforcing the belief that true, prolonged youthfulness starts at the cellular level.

Beauty is becoming preventive. Algorithms anticipate needs before visible signs appear, with artificial intelligence increasingly capable of anticipating a consumer’s skincare needs before visible signs of aging or skin issues emerge. This is possible through sophisticated technologies that analyze lifestyle factors, environmental data, and even genetic predispositions, offering preemptive solutions that target underlying skin concerns. The global AI-powered skincare market is projected to reach almost \$4 billion by 2026 (Statista, 2022), highlighting the growing trend of predictive beauty solutions that tailor skincare routines to individual needs.

Beauty is becoming measurable. Skin health is tracked and quantified like fitness. Consumers are now able to track and measure their skin health much like they do their physical fitness. Devices such as wearable skin analyzers (e.g., Oura, WHOOP), applications that assess hydration and elasticity, and home-use diagnostic tools are making it easier to measure key skin metrics like texture, moisture levels, and pigmentation. The global market for skincare devices was valued at \$14 billion in 2024 and is projected to reach \$25 billion by 2030, growing at a CAGR of just under 10% from 2024 to 2030. Within this market, the skincare diagnostic devices segment is expected to reach \$3 billion by 2030 at a CAGR of 10%, driven by increasing demand for data-backed insights into skin aging and overall condition. (Global Newswire, 2021). This trend aligns with the broader health and wellness movement, where consumers expect quantifiable results.

Beauty is becoming emotional. Mood and stress are recognized as beauty metrics. As emotional factors and mental well-being are increasingly recognized as key metrics of beauty, the connection between mental health and skin health has gained substantial attention. Research shows that stress, anxiety, and poor sleep can directly impact the skin, causing conditions like acne, eczema, and premature aging (American Academy of Dermatology, 2020). As a result, neurocosmetics (i.e., products designed to interact with the skin’s neurosensory system and aim to improve both skin health and mental well-being) are growing. Beauty brands are incorporating mental wellness elements into their products, offering solutions that not only address skin concerns but also aim to improve mood and reduce stress. For instance, adaptogens, CBD, and other mood-balancing ingredients are used in formulations to cater to the growing demand for products that support emotional well-being. Between 60% and 80% of visits to primary care physicians are stress-related, underscoring the importance of integrating emotional health into the beauty equation (Nerukar et al, 2015).

Today's consumer demands both visible results now and lasting improvements over time. Rather than merely addressing visible signs of aging—such as oxidative stress, inflammation, and cellular senescence—aiming to prevent damage before it manifests. This has heightened demand for clinically proven ingredients like peptides, stem cell extracts, and adaptogens that support long-term skin vitality. Additionally, the intersection of beauty and wellness is becoming more pronounced, with formulations that blend topical and ingestible approaches, reflecting the growing emphasis on beauty from within. Longevity's focus on personalization is also inspiring the rise of tailored beauty regimens, where products are customized based on individual biomarkers, genetic profiles, and lifestyle factors. Furthermore, with consumers adopting a “lifetime” mindset, there is increasing attention on sustainability and skin compatibility over prolonged use.

As beauty shifts toward more medicine, grounded in clinical results, professional expertise, and bioactive formulas, we enter the era of medicalized beauty. It's no longer just about appearance, but measurable outcomes and trusted guidance. Winning means delivering science, speed, and service at every touchpoint.

VIII. Defining Medicalized Beauty

Medicalized beauty is the convergence of aesthetics and medicine, where beauty concerns are reframed as physical ones. Consumers will seek to tap into or leverage biology or the understanding of natural functions to achieve an aesthetic result. As biology and natural functions have traditionally been the realm of medicine, and aesthetics that of cosmetics, consumers are now blurring the boundaries between beauty and health care in the name of self-optimization that can be seen in the mirror (not to mention social media).

This is more than a fleeting trend—it's a shift in consumer expectation, particularly in the skincare and haircare categories. Competitive dynamics in the beauty, medical, and pharmaceutical industries will shift to meet this evolution in the consumer psyche and behavior. In order to stay relevant and compete effectively in this new landscape, beauty brands must define their role and differentiated value proposition, not only versus other beauty brands, but also versus medical and pharmaceutical players who have emerged as new competitors.

While not every brand will need to participate in the medicalized beauty space, certainly all brands in treatment categories like skincare, body care, and haircare need to play in this space in some capacity to remain competitive. For certain brands, it may not be overly relevant to its consumer base, while for others it will be a natural fit for the brand DNA. An example where this might not be beneficial is a color cosmetics brand with a younger consumer, such as Glossier. Brands that will play and engage with medicalized beauty will vary based on the unique elements of the brand, including positioning. Luckily, to the consumer, this concept exists on a spectrum, from concerns that have a light, more holistic wellness focus to those that require a high-performance dermatological intervention for dramatic visible results. Understanding where a brand plays on this scale is crucial to ensure consumer trust, competitive differentiation, and ultimately brand equity. Understanding the spectrum of medicalized beauty is also important for beauty conglomerates in order to better manage and diversify their brand portfolios.

IX. The Codes of Medicalized Beauty

Regardless of where a brand falls within the medicalized beauty spectrum, there are five key codes or hallmarks to follow:

- A. Body-Mind Appearance Alignment:** Nexus between body, mind, and appearance as one system. In this system, appearance can be altered positively or negatively by affecting the human body or mind. Beauty is linked to internal health and emotional well-being.
- B. Science-First Storytelling:** Product efficacy is primary, so clinical support and strong scientific backing are integral in product and brand storytelling.
- C. Professional Authority:** Experts in lab coats signal trust and efficacy. Consumers expect deep scientific knowledge backed by experts. This includes medical professionals, aestheticians, and scientists.
- D. Clinical Aesthetic:** A scientific aesthetic evokes high efficacy or medical grade performance. This extends beyond brand identity through packaging and product to evoke precision, efficacy, and trust.
- E. On-Demand Access:** Access to beauty mirrors telehealth and on-demand prescription services with fast, seamless, personalized experiences that leverage cutting-edge technology.

These codes build trust and credibility with performance-driven consumers. Not every brand needs to tap into all five codes to participate. Some may be more pronounced than others for certain brands depending on the brand's unique DNA.

X. Unmet Needs in the Modern Beauty Industry

The beauty industry stands at a pivotal juncture, poised for transformation amid evolving consumer expectations and a growing convergence with the wellness and health care sectors. This section examines the key unmet needs within the current beauty landscape, exploring the gaps between consumer desires and existing offerings across product development, retail experiences, and portfolio management strategies. By addressing these unmet needs, the beauty industry can unlock significant growth potential and establish itself as a vital component of a broader wellness ecosystem.

A. The Demand for Clinical Efficacy and Clarity

As consumers are increasingly sophisticated and discerning, seeking beauty products that deliver tangible, measurable results similar to clinical interventions, many brands are not keeping up. Current offerings often fall short of meeting these heightened expectations. Many products lack robust clinical trials and measurable performance data, leaving consumers skeptical about their true efficacy. Navigating the overwhelming array of products can be daunting, with

inconsistent claims and confusing terminology adding to the complexity. Consumers crave clearer product navigation, simplified ingredient lists, and transparent communication about expected results. The shift toward a more science-driven approach with product development, prioritizing clinical validation, and transparent communication is critical to build consumer trust and deliver on the promise of tangible results.

B. The Rise of Personalized Treatments and the Need for Credible Guidance

The one-size-fits-all approach to beauty is becoming obsolete. Consumers are seeking personalized experiences tailored to their individual needs and concerns, including specific medical conditions like polycystic ovary syndrome (PCOS) and rosacea. This demand for personalization extends beyond product recommendations to encompass the entire retail experience. However, the current retail landscape often lacks the diagnostic tools and expert guidance necessary to deliver truly personalized solutions. While some brands offer online quizzes and virtual consultations, these often lack the depth and credibility required to address complex skin concerns. Consumers desire access to medically credible advisors, such as dermatologists, who can provide personalized recommendations based on a thorough understanding of their individual needs and skin conditions. Integrating diagnostic tools, personalized consultations, and expert guidance into the retail experience will be crucial for meeting the evolving demands of today's beauty consumer.

C. Beyond Product: Scaling Services, Biologics, and Clinical Training

The beauty industry's current M&A strategies often prioritize product acquisition, overlooking the significant potential of scaling services, biologics, and centralized clinical training. This product-centric approach limits the industry's ability to fully embrace the medicalization of beauty and deliver comprehensive wellness solutions. Acquiring or partnering with companies specializing in services like personalized skincare consultations, aesthetic treatments, and wellness coaching can enhance the consumer experience and create new revenue streams. Furthermore, investing in biological research and development can lead to innovative skincare solutions that address the underlying causes of skin aging and other concerns. Establishing centralized clinical training programs for beauty professionals can elevate the industry's overall credibility and ensure consistent delivery of high-quality services. By rethinking M&A strategies, the beauty industry can unlock significant growth potential and solidify its position within the broader wellness ecosystem.

D. Reimagining Beauty: A Health-Aligned, Science-Backed Ecosystem

Meeting the evolving needs of today's beauty consumer requires a fundamental shift in the industry's mindset. The traditional beauty model must be reimagined as a health-aligned, science-backed system that seamlessly integrates product, retail, and portfolio management strategies. This transformation necessitates a commitment to clinical validation, personalized experiences, and a more holistic

approach to beauty and well-being. By embracing this new paradigm, the beauty industry can not only meet the demands of today's discerning consumer but also establish itself as a vital player in the rapidly expanding wellness economy. The future of beauty lies in its ability to empower individuals to achieve their desired aesthetic outcomes while simultaneously promoting overall health and well-being.

XI. Strategic Framework: Building a Medicalized Beauty Ecosystem Within the Corporate Core

To thrive in the rapidly evolving beauty landscape, conglomerates must establish a centralized medicalized beauty unit, similar to a center of excellence, dedicated to the convergence of beauty, biotech, and clinical innovation. This unit will house cross-functional teams of experts, from dermatologists and data scientists to marketers and regulatory specialists, fostering collaboration and driving innovation grounded in scientific credibility. By integrating these disciplines and building strategic partnerships with biotech startups, diagnostic platforms, and emerging technology providers, the unit can unlock entirely new category potential and deliver measurable, consumer-first outcomes. This team won't simply advise on innovation; it will actively lead development and commercialization.

In addition to research and development, this unit will oversee portfolio expansion through thoughtful M&A, with an emphasis on acquiring clinical brands, diagnostic ecosystems, and performance-driven solutions that complement the broader strategy. To ensure these advancements scale effectively, a clinical onboarding and education platform will support consistent training across all brands, equipping retail and service teams with the knowledge they need to deliver personalized, data-backed recommendations with confidence.

Taken together, this approach has the power to reshape the beauty experience, from isolated product moments to connected health-beauty ecosystems. In doing so, it will foster deeper consumer trust, enable long-term loyalty, and position the organization as a leader in the future of beauty health.

XII. Strategic Recommendation #1: Portfolio Management: Expand Through Strategy, Not Saturation

In the evolving beauty landscape, strategic portfolio management is no longer a supporting player, but the star of the show. As the line between beauty and medicine blurs, consumers increasingly look to medicine to solve beauty concerns; beauty conglomerates must adapt their portfolios to reflect this shift. This means actively seeking acquisitions in biotech, personalized medicine, and clinical aesthetics, focusing on brands that offer scalable, science-backed solutions. This strategic approach will position beauty companies as providers of comprehensive medicalized beauty ecosystems.

The current M&A climate, while cautious, presents unique opportunities. Smaller brands with strong global potential and innovative technologies, particularly in biotech and personalized medicine, offer significant long-term value. By strategically acquiring or partnering with such companies, beauty conglomerates can quickly gain access to cutting-edge advancements, expand their market reach, and establish themselves as leaders in the medicalization of beauty. This proactive portfolio approach is crucial for long-term success in the rapidly converging beauty and medical-adjacent industries.

A. Medical Inspiration

Recognizing that investors in the beauty sector are focused on profitability, operational efficiency, strong customer engagement, and scalable models, there is an opportunity to look in the medical space to achieve this. Categories like biotech are gaining attention (The Business of Fashion, 2024). Mergers and acquisitions in the health industries, such as pharmaceuticals and health care services, are expected to rise in 2025 due to improving macroeconomic conditions, lower interest rates, and potential regulatory changes (PwC, 2025). Large pharmaceutical companies are targeting biotech, especially late-stage biotech companies, while health care services are focusing on digital and AI technologies. EY (formerly known as Ernst & Young) reported an uptick in the volume of biopharma deals in 2024, with the number of these transactions rising 17% year-over-year (Philippidis, 2025).

There are four key factors why beauty companies need to take a closer look into this space: political openness, decrease in costs, aging patent exclusivity, and strategic spending. With recent socio-political shifts in the United States, there is expected to be less resistance to M&A deals through the Federal Trade Commission (FTC). This is not necessarily industry-specific, but instead brings a new perspective to companies who may have hesitated to acquire in the past few years. Inflation rates are decreasing, but so are the costs of biopharma M&A deals. In 2024, there was a 51% decrease in the average dollar value of biopharma acquisitions (Philippidis, 2025). Additionally, Deloitte's U.S. Life Sciences Sector Leader explains that some of the biggest-name blockbuster drugs of recent years stand to lose their patent protection over the next five years (Philippidis, 2025). Outside of M&A, pharmaceutical companies are also investing spend and resources in different areas. In fact, pharmaceutical companies spend, on average, nine times more on research and development than beauty companies, whereas beauty companies spend seven times more on advertising and promotion than pharmaceutical companies (Depraeter-Montacel et al., 2023). This investment disparity demonstrates the opportunity to accelerate beauty M&A through industries outside the traditional playbook.

The convergence of favorable market conditions, including increased political openness to M&A, decreased biopharma acquisition costs, and expiring drug patents, creates a prime opportunity for beauty companies to explore strategic acquisitions in the medical and biotech sectors. This strategic move aligns perfectly with investor priorities, offering potential for enhanced profitability, operational efficiency, and scalable growth models. By capitalizing on these converging trends, beauty companies can position themselves for long-term success in the rapidly evolving medicalized beauty landscape.

B. Critical Collaborations and Joint Ventures

Portfolio management will feature creative deal structures, including collaborations and joint ventures, with private equity funds active in med-tech and digital health sectors. This landscape presents an opportunity for beauty brands to start thinking outside of the traditional categories and consider new verticals to help better prepare for this future. According to McKinsey, the aesthetics injectables market is poised for up to 14% growth annually (Leclerc, Peters, Scaglione, & Waring, 2024). L'Oréal took advantage of this growing sector by acquiring a 10% stake in Galderma, one of the world's largest players in injectable aesthetics (L'Oréal Groupe, 2024). This strategic investment indicates growing potential for M&A in the dermatology and aesthetics businesses and indicates appetite for companies to buy outside of their traditional expertise.

C. The New Hero Ingredient Story

Portfolio management should also consider targeting biotech and pharma-adjacent startups repurposing drugs with aesthetic and cosmetic potential. FDA-approved drugs are the new hero ingredients, offering clinically proven solutions that bring biotech-grade performance to skincare. What will be the next GLP-1? The future of beauty innovation lies in drug repurposing, leveraging FDA-approved pharmaceuticals and biologics with aesthetic side benefits. In 2024 alone, the FDA approved 50 novel drugs, some of which hold significant promise for application within the beauty industry. For instance, Ebglyss, approved for the treatment of atopic dermatitis, could potentially be repurposed for addressing skin inflammation and sensitivity in cosmetic formulations. This approach to ingredient discovery offers a unique opportunity to develop highly efficacious skincare solutions grounded in rigorous scientific research and clinical validation (FDA, 2025). Companies should consider looking into drug trials, clinical studies and ingredient forecasting to discover the next juncture of this shift.

D. Cutting-Edge Technology

Companies with the opportunity to build the ecosystem through strategic portfolio management should consider acquiring biotech labs, diagnostic platforms, and personalized technology. All three markets are expected to grow in the next five years. According to GlobeNewswire (2025), the biotechnology and personalized medicine markets have projected compound annual growth rates (CAGR) of almost 14% and 9%, respectively. Key drivers of biotechnology growth include advances in gene therapies and regenerative medicine. More specifically, bioprinting and biostimulators pose interesting opportunities for the beauty industry.

From a personalization perspective, Amazon's recent nearly \$4 billion buyout of One Medical is a prime example of what's on the horizon. By combining Amazon's technology with One Medical's health care insights, consumers will increasingly seek comprehensive approaches that address not just external beauty treatments but also the underlying factors affecting aging and hair health, such as hormones, lifestyle, and genetics. The ability to track and manage these variables through a unified platform will appeal to health-conscious consumers who desire a more integrated approach to aging

and wellness (Amazon, 2023). They also provide new avenues for data collection that companies can take advantage of for product marketing and targeting.

Another company to watch is Sanofi. While various treatments exist to manage acne symptoms, a novel approach is gaining traction: an acne vaccine. Acne is estimated to affect 231 million people worldwide, therefore being one of the most prevalent diseases globally. Acne is also one of the top causes of years lived with disability and nonfatal disease burden. Despite being one of the most prevalent diseases worldwide, the mainstays of acne treatment have remained largely unchanged over the past 30 years. To date, there is still no safe and effective treatment that can prevent and cure this disease (Sanofi). That was until now. Currently in Phase I/II clinical trials, Sanofi's mRNA vaccine aims to modulate the body's immune response to *Cutibacterium acnes*, the primary bacteria associated with acne. This innovative approach addresses the need for a more targeted and potentially curative treatment, as current options often involve long-term use and unpleasant side effects. This pursuit of an acne vaccine underscores the growing influence of technology in the medical field, particularly the application of mRNA technology in developing targeted therapies for various conditions. Further research and clinical trials will be crucial to determine the vaccine's long-term efficacy and potential to reshape the acne treatment landscape (Cooke, 2025).

Strategic portfolio management is crucial for beauty companies to thrive in the evolving medicalized beauty market. This involves actively pursuing acquisitions and partnerships in biotech, personalized medicine, and clinical aesthetics, focusing on brands with science-backed solutions and demonstrable results. Favorable market conditions, including decreased biopharma acquisition costs and expiring drug patents, create opportune moments for strategic investment in these areas. This approach positions beauty companies not just as cosmetic providers but also as engineers of comprehensive beauty-health ecosystems.

Beyond traditional acquisitions, creative deal structures like collaborations and joint ventures with med-tech and digital health companies are essential. Drug repurposing, leveraging FDA-approved pharmaceuticals for cosmetic applications, presents exciting opportunities for innovation. Investing in biotech labs, diagnostic platforms, and personalized technologies further strengthens the portfolio, aligning with projected market growth in these sectors. Examples like Amazon's acquisition of One Medical and Sanofi's development of an mRNA acne vaccine highlight the increasing convergence of technology and health care, offering a glimpse into the future of beauty. By embracing these advancements, beauty companies can effectively cater to the growing demand for integrated, personalized wellness solutions.

XIII. Portfolio Management Considerations

While portfolio management, including M&A, will be used as a tool for beauty companies to participate in the medical space, it doesn't come without challenges and risks. While the potential benefits of M&A are significant, successful integration requires careful planning and execution. One of the most significant challenges is the potential for training gaps and cultural clashes. Retraining diverse teams across multiple markets on new science, safety protocols, and service standards requires significant time and resources, potentially delaying synergy realization and disrupting ongoing operations.

Bridging the cultural gap between the beauty and medical sectors is essential for avoiding miscommunication and maximizing the potential of the partnership. M&A can either elevate or dilute brand equity, depending on how effectively the acquired clinical credibility is integrated into the parent brand. Careful execution is paramount to ensure that the acquisition enhances consumer trust and strengthens the brand's position within the market. As highlighted by *Harvard Business Review*, a significant percentage of mergers and acquisitions fail due to challenges in integration and cultural alignment (Gelfand, Gordon, Li, Choi, & Prokopowicz, 2018). Therefore, a strategic and well-executed integration plan is critical for realizing the full potential of these partnerships, including the introduction of one ecosystem that has many expressions and standards that work across multiple brands and a playbook on how to integrate pharma into beauty.

To maintain credibility in a diversified brand ecosystem, clinical standards must be adaptable to the unique demands of each category, region, and consumer expectation. A unified clinical framework can provide consistency and reliability in this new fused space, but a one-size-fits-all approach risks diluting brand relevance and hindering speed to market. It is imperative brands remain flexible in their application of medicine in beauty to resonate with the target audience while still addressing regional differences and consumer preferences. Adaptability is crucial to ensuring success and relevance of a brand's offering, especially when introducing biotech and pharma.

The integration of biotech and pharma into the beauty industry is a double-edged sword. While repurposed drugs can provide credibility by offering proven efficacy and safety profiles, they also introduce a new level of complexity. Brands must carefully translate the scientific and regulatory requirements, such as precise dosing, language, and compliance with FDA guidelines, into beauty products that feel safe and intuitive for consumers. This delicate balance between clinical rigor and consumer-friendly presentation is key to successfully integrating repurposed drugs into beauty offerings without compromising the integrity or usability of the products.

Furthermore, creating a successful blend of clinical credibility and consumer appeal is key. As biotech and diagnostics scale across multiple brand categories, they must retain distinctiveness while maintaining shared clinical capabilities. This necessitates a careful balance: Clinical standards and protocols must be aligned with each brand's voice and purpose, ensuring that the product feels authentic to its category. By doing so, brands can stay true to their identity while leveraging the credibility of biotech and diagnostics, ultimately delivering products that meet the evolving needs and expectations of their consumers.

XIV. Strategic Recommendation #2: Product: Build for Efficacy, Formulate for Credibility

The future of beauty is increasingly shaped by the rigor and credibility of medical science. As consumers demand faster, more effective results, beauty brands are moving beyond superficial enhancements toward clinically inspired formulations that mirror medical-grade precision. These innovations are rooted in biotechnology, dermatological insights, and regenerative science, offering a new standard of beauty performance defined by efficacy, safety,

and measurable outcomes. Advanced delivery systems, bioengineered actives, and growth factors derived from stem cell science are now being leveraged to help dramatically accelerate visible performance, reducing the time between use and results.

A. Formulate Bioactive, High-Performance Products

1. Borrowing from Medicine and Biology to Redefine Beauty Performance

Emerging technologies are playing a pivotal role in reshaping the beauty and wellness landscape. Precision health tools like genetic and microbiome testing are enabling hyperpersonalized beauty solutions tailored to an individual's biology. Artificial intelligence is being used to analyze skin conditions and predict product efficacy, while bioengineered ingredients, such as lab-grown collagen and plant-derived retinol alternatives, offer powerful, sustainable alternatives to traditional actives. Wearables and diagnostics are evolving to monitor hydration, skin elasticity, and environmental exposure in real time, enabling consumers to proactively adjust their beauty regimens. These innovations are bringing a clinical rigor to beauty, making the future of skincare deeply intertwined with medical diagnostics, biotechnology, and data science. Given this context, beauty brands need to look to medical procedures for inspiration both with respect to the end result as well as the mode of action. For example, aesthetic medical treatments that resculpt the face, including deep plane face lifts and fat replacement surgery, are becoming increasingly popular. Beauty brands could develop formulas that aim to re-volumize the appearance of facial contours and even showcase the mode of action of those products by advertising before and after images of skin's surface using a specialized cutometer tool that shows increased skin density. Leveraging biotechnology in cosmetic products is also key. Formulations should incorporate bioidentical ingredients derived from or mimicking the human body, such as growth factors, peptides, or microbiome-friendly compounds, to drive functional results. This can include technology or ingredients that relate to other parts of the body besides skin.

2. Finding Cosmetic Adjacencies With Medicine

Procedure-adjacent products, designed to support recovery after treatments like microneedling, laser resurfacing, and injectables, are rapidly gaining traction. These products often feature calming active ingredients, repair-boosting agents, and barrier-reinforcing ingredients that help enhance skin regeneration and reduce downtime. The rise of post-procedure care reflects consumers' desire for comprehensive, end-to-end wellness experiences. Brands that develop credible companion products to aesthetic procedures are establishing stronger ties with medical professionals and consumers alike. This not only offers maintenance but also a clinical assurance that results will be maximized and protected. A commercial innovation could be for beauty brands to develop kits for specific procedures (e.g., microneedling care kits, post-hair transplant shampoo and conditioner), that could even be sold in travel retail outlets in medical tourism destinations such as Turkey and South Korea. In addition, beauty brands can launch cosmetics in Western markets that are considered medical devices, special function cosmetics, or cosmeceuticals in Asia in order to enjoy a medical halo effect from the regulatory category in the Eastern world.

Beauty brands should also launch products that address aesthetic issues resulting from cosmetic medicine treatments. With approximately 15 million Americans now using GLP-1 drugs like Ozempic (Lebsack, 2024), there is an urgent need for supportive skin care that addresses the side effects of rapid weight loss for face and body, such as skin dehydration, facial hollowing, and laxity. Products that stimulate collagen and elastin production through ingredients like retinoids and peptides will be critical, as will solutions that promote skin tightening and overall dermal health such as moisturizers, exfoliators, and sunscreens.

Other medical aesthetic treatments from which beauty brands can take product development inspiration are:

- **Genetic and Microbiome-Based Skincare:** Develop treatments based on an individual's DNA and skin microbiome to tailor skincare regimens.
- **Prejuvenation:** Focus on collagen stimulation and mild interventions before significant aging signs appear (e.g., bio-stimulatory injectables like PLLA or CaHA-based fillers promote natural collagen production).
- **Regenerative Aesthetics:** Use of exosomes, stem cells, and platelet-rich plasma (PRP) for skin rejuvenation and hair restoration.
- **Therapies to Improve Appearance from Within:** Bioidentical hormone replacement therapy (BHRT) involves using hormones that are chemically identical to those produced naturally in the body, such as estrogen and progesterone, to manage hormone imbalances that occur during menopause and other life stages. Peptide therapy is a medical treatment that utilizes small chains of amino acids (peptides) to influence various bodily functions and promote healing and regeneration.
- **AI Diagnostics and Treatment Planning:** Use AI to analyze facial features, skin conditions, and even symmetry to recommend customized procedures or products.

By aligning innovation with aesthetic medicine, beauty brands can establish relevance in a new era where efficacy, science, and personalization are paramount.

B. Packaging That Performs Like a Procedure

Not only do beauty formulas need to evolve, but packaging must do so as well to communicate scientific intent and support product efficacy. Today's consumers increasingly expect packaging to play an active role in the treatment process, reinforcing trust in the clinical nature of the product. Brands should consider integrating delivery systems such as dissolvable microneedle patches, measured-dose ampoules, and applicators that mimic medical tools to enhance precision and reinforce the product's functional credibility. These formats not only elevate perceived effectiveness but also align with consumer expectations for products that resemble professional-grade treatments. By designing packaging that educates users on precise application and visibly signals a scientific, results-driven purpose, brands can bridge the gap between cosmetic appeal and pharmaceutical influence.

c. Disruptive Performance Claims That Earn Trust

As clinical innovation becomes the benchmark for beauty efficacy, the industry is shifting toward comparative and companion claims that reinforce medical legitimacy. Comparative claims such as “delivers results equivalent to a fractional laser” or “as effective as prescription tretinoin” are backed by clinical trials and head-to-head testing. These claims elevate consumer confidence by directly aligning product performance with well-known procedures or pharmaceutical benchmarks. Simultaneously, companion claims (e.g., “pairs with Botox to extend results,” “visibly reduces redness post-chemical peel,” “visibly lifts and firms sagging facial skin due to rapid weight loss from GLP-1s”) position beauty products as essential extensions of clinical treatments. This strategic alignment allows brands to carve out a niche in the rapidly growing space between beauty and medicine, offering consumers not just products but also integrated wellness solutions. Visuals such as syringes, bandages, or scissors can also be used as a tool to communicate medical efficacy or clinical strength.

XV. Product Considerations

A. Cosmetic Versus Drug: Walking the Line

In today’s rapidly evolving beauty landscape, the boundary between cosmetics and drugs is increasingly blurred. While regulatory frameworks worldwide maintain a legal distinction between the two, the line often hinges on nuanced criteria such as ingredient concentrations, delivery mechanisms, and marketing claims. For example, ingredients like hydroquinone or certain retinoids may be classified as cosmetic at low concentrations but cross into drug territory when potency increases. Additionally, products administered via novel delivery systems that penetrate deep within skin, such as microneedles, usually can be administered only by a medical provider or licensed professional and are subject to drug regulations, including pre-clearance requirements (U.S. Food and Drug Administration, n.d.).

Marketing claims are also a key regulatory trigger. In the United States, the Food and Drug Administration (FDA) defines drugs as products intended to diagnose, treat, mitigate, or prevent disease, or to affect the structure or function of the body (U.S. Food and Drug Administration, n.d.). When beauty products make claims about altering gene expression, increasing collagen synthesis, or extending cellular longevity, they may fall under scrutiny as unapproved drug products. High-profile enforcement actions, such as the FDA’s warning letters to specific beauty companies for suggesting products could affect gene activity, underscore the risks of overstepping into drug claims territory (U.S. Food and Drug Administration, n.d.). Trending claims like “increasing cell longevity” further blur these lines. On social media, indie brands and influencers often operate with lower risk profiles than larger beauty companies, and they can potentially create a consumer perception that cosmetics offer therapeutic benefits reserved for drugs.

B. Emergence of New Competitors: Beautification of Medicine

Pharmaceutical companies are beginning to compete more directly with beauty brands by introducing product lines that are aesthetics-focused, rather than strictly therapeutic. These lines include prescription offerings for weight loss like GLP-1s, hair loss, and skincare (W. Flaherty,

personal communication, May 2, 2025). These pharmaceutical companies are offering exciting and breakthrough aesthetic product innovations that are available by prescription only, and therefore, not available from traditional beauty brands. The practice of dermatology has also expanded with 55% of dermatologists dedicating a portion of their practice to cosmetic services (American Academy of Dermatology, 2007). In addition, medical spas have proliferated in the United States in the past decade and gained in popularity as a destination to treat aesthetic concerns like anti-aging and hyperpigmentation (Grand View Research, 2023).

XVI. Strategic Recommendation #3: Place: A Personalized Omni Experience

The evolution of beauty retail has always mirrored cultural and technological shifts, but never has it faced a transformation as foundational as the one posed by medicalization. The future of omnichannel is a seamless, clinical, and credible experience. It's an omni-intentional, full-service journey from diagnosis to delivery. This will deliver a more precise and trusted beauty journey through three key pillars: beauty destination elevation, personalization and technology, and upskilling talent.

A. The New Beauty Destination

Beauty companies need to rethink the beauty destination through this lens, as consumers are looking for a full-service experience both online and offline.

Despite the retail landscape shifting to become more omni, offline retail is here to stay. Consumers across the globe are increasingly drawn to the physical retail spaces not just for product innovation but also for the social and experiential value these environments offer. This highlights a strong desire for in-store shopping to be tactile, communal, and relaxing. In fact, 53% of shoppers prefer to shop in store, and 66% of shoppers are visiting a store because it's a good way to socialize (Intel, 2024). Also, a 2023 Global Wellness Institute report found that 79% of wellness consumers worldwide prefer brands and services that integrate health care, mental health, fitness, and beauty, indicating a desire for comprehensive solutions that address well-being in a unified, accessible environment (Global Wellness Institute, 2023). Many retailers within the beauty world as well as in the health care space are already seeing a surge toward this new retail model of the future.

There are several early adopters of this new, integrated model including retailers such as Ulta Beauty, Sephora, and Target that have actively expanded their wellness-focused offerings. Ulta Beauty's Wellness Shop, now present in over 1,330 locations, integrates ingestibles, clinical-grade skincare, and biohacking products alongside spa-inspired store designs. They also have educational displays designed to enhance product discovery and customer engagement (Retail Dive, 2023). Sephora has similarly integrated wellness technology through partnerships with companies like HigherDOSE, offering in-store infrared saunas and PEMF (pulsed electromagnetic field) mats. Sephora's partnership with SheSpot in the UK has introduced sexual wellness and intimate care products to its online marketplace, further expanding the definition of beauty retail (Digital Beauty, 2023). Target has significantly grown its wellness assortment, adding over 600 exclusive products as part of a broader self-care initiative targeting affordability

and accessibility, particularly for Gen Z consumers. This focus on wellness contributed to a 3% sales increase in the last fiscal quarter (Q4 2024), driven by skincare, sexual health, and wellness categories (Target Pressroom, 2025).

Even mass-market players are responding to this shift. Walgreens and CVS have both piloted HealthHUB concepts that offer wellness services and chronic condition management, hinting at this growing intersection. These examples reveal the viability and scalability of hybrid health-beauty ecosystems.

We're seeing similar concepts within the health space. HerMD, a women's health care company that offers services ranging from gynecology to aesthetic procedures, builds its entire business around blending medical care and beauty seamlessly. Similarly, Tia Health combines mental health, primary care, and gynecology with services like Botox and nutrition coaching. These companies demonstrate that consumers are not only open to but also actively seeking convenient, holistic platforms that cater to both their health and appearance.

The integration of medically informed services within beauty spaces is further exemplified by the growth of the global medical spa market, which was valued at almost \$37 billion in 2024 and projected to reach over \$70 billion by 2034, growing at a CAGR of almost 7% (GlobeNewswire, 2024). This model blends aesthetic treatments with clinical-grade services such as injectables, laser therapies, and wellness consultations. These models bridge the gap between traditional dermatology practices and beauty retail. Companies like Heyday and Skin Laundry have established hybrid retail-medical spaces, offering clinical-grade facials and laser treatments in high-traffic urban and suburban retail centers. Heyday operates over 25 facial shops in the United States, while Skin Laundry has expanded globally to more than 50 locations (Heyday Skincare, 2024; Skin Laundry, 2024).

The pharmacy beauty market, particularly in Europe and Asia, has also emerged as a significant growth sector. The global dermocosmetics market surpassed \$65 billion in 2023 and is projected to grow at a CAGR of almost 10% through 2032 (Global Market Insights, 2024). Pharmacies in these regions have expanded their beauty aisles to include high-end, dermatologist-recommended skincare products, wellness ingestibles, and AI-powered skin diagnostics. Digital prescription services and telehealth consultations have further positioned pharmacies as integral hubs in the beauty and wellness ecosystem.

B. Personalized and Advanced Technology

This convergence is being accelerated by consumer preferences for holistic, personalized care backed by technology. It's crucial for companies to meet the consumer where they are and infuse technology that better understands what the consumer wants and needs to drive the purchase. Consumers aren't looking to be sold to, but instead to be understood. Year over year, they are also getting more tech savvy; in fact, 30% of consumers already expect biometric personalization in beauty (Mintel, 2024).

This merging of health care and retail taps into deeper consumer psychology. Consumers experience a psychological benefit from personalization. Diagnostics offer a feeling of control over their beauty outcomes, increasing both product satisfaction and brand loyalty. This shift in expectation positions beauty omni experience as a key access point for broader health and

wellness services, potentially democratizing access to medically informed skincare and preventive care.

One advanced example of a personalized health care model is Parsley Health. Parsley Health operates as a membership-based, holistic health care provider that integrates functional medicine, nutrition, mental health support, and clinical aesthetics under one roof (Parsley Health, 2024). This model reflects the growing consumer expectation that aesthetic care should be backed by medical expertise and personalized to individual health profiles.

Digital-first brands such as Hims & Hers and Curology have democratized access to prescription skincare, hair growth treatments, and mental health services through telemedicine and direct-to-consumer (DTC) models (Fierce Healthcare, 2024). By bypassing traditional health care gatekeepers and providing affordable, medically backed treatments, these brands have broadened access to clinical solutions for younger, tech-savvy consumers.

One of the most significant drivers of this convergence is the rapid adoption of wearable health tracking devices, which now permeate mainstream consumer culture. In the United States, approximately 44% of adults own a wearable device capable of monitoring metrics such as heart rate variability, sleep patterns, and stress levels (Rock Health, 2023). These devices, originally designed for fitness and wellness applications, are increasingly informing skincare routines through real-time biofeedback on factors like skin hydration, fatigue, and environmental stressors. Not only can they track this information but also curate product recommendations that align with their physiological data. Recent developments in wearable sensor technology have made it possible to detect variations in skin elasticity, UV exposure, and inflammatory responses, empowering consumers to make informed, real-time adjustments to their skincare regimens (Emotion Master, 2023). Neutrogena Skin360 is a great example of this, as it's an AI-powered tool that utilizes your smartphone camera to assess skin health and track changes over time (Kenvue Brands LLC). Unilever's BeautyHub PRO, an AI-powered personalization platform, has already reached over 3 million consumers, with users being 43% more likely to complete a purchase than those engaging through traditional channels (Unilever, 2024). International markets offer further proof points. In Japan, Shiseido piloted Optune, a personalized skincare system that uses an app and cartridge-based dispensing unit to deliver daily regimens based on real-time environmental and skin data (Shiseido Co., 2019).

As diagnostics and biofeedback tools become more sophisticated, the very nature of product sampling is also being reimagined. Historically, beauty sampling has revolved around shade-matching or fragrance trials. The next generation of sampling will move toward need-based trials, with consumers receiving curated products based on diagnostic assessments from AI-powered kiosks or wearable feedback data. Early market research indicates significant consumer appetite for this model: A 2023 report found that 72% of U.S. beauty consumers would prefer sampling products specifically tailored to their skin condition and lifestyle factors over traditional open-sample trials (Allied Market Research, 2023). This evolution enhances both consumer satisfaction and product efficacy, while reducing waste and improving inventory control for retailers.

C. Reskilling and Upskilling Talent

Central to this vision is the redefinition of expertise. The beauty advisor of the past, trained to match shades or explain ingredient benefits, is being replaced by clinical concierges, estheticians, registered nurses, nutritionists, and wellness coaches who can interpret diagnostic data, recommend preventive regimens, and speak credibly about medical-adjacent therapies. This professional presence elevates the legitimacy of the retail experience. Medical estheticians, in particular, undergo specialized clinical training to address complex dermatological concerns such as acne, rosacea, and post-inflammatory hyperpigmentation, traditionally managed within a medical setting (HealthcareDegree.com, 2024). As beauty retail spaces integrate more medical-grade products and devices, the expertise required to guide consumers through these offerings has similarly advanced.

For brands, this means investing not only in retail but also staffing and education platforms. One company doing this well is L'Oréal. L'Oréal's Dermatological Beauty division supports and educates health care professionals with skin health resources, offering a wide range of dermatological skincare solutions developed with dermatologists. They offer continuing medical education, such as SkinChat and Dermoscopy, which is not only offered for professionals but also for internal employees and consumers (EADV Congress, 2024).

Looking ahead, the future of omnichannel beauty may be more medical than cosmetic. We envision a world where consumers begin their skincare journey with an at-home diagnostic kit or AI-powered consultation. That data feeds into an app, syncing with in-store diagnostics or teledermatology services, which then customizes their regimen. These platforms may offer subscription-based replenishment or adaptive routines, adjusting products seasonally or based on biomarker changes. Retail locations may double as diagnostic labs, wellness centers, and skincare dispensaries, offering both the emotional experience of beauty and the clinical rigor of medicine. The integration of science, health data, and beauty retail represents not only a commercial opportunity but also a critical evolution in how consumers engage with self-care and preventive health. As this convergence continues, future growth will hinge on brands' ability to navigate medical regulations, train a hybrid workforce, and invest in advanced diagnostic and personalization technologies.

XVII. Place Considerations

Despite its promise, the path to omnichannel transformation is not without obstacles. The implementation of diagnostic tools, AI-driven product recommendations, and clinical staff at retail touchpoints carries significant cost and complexity. Brands must grapple with data security regulations, particularly if biometric or health-related data is collected. Questions around HIPAA compliance, consumer consent, and data storage will become increasingly relevant. Furthermore, staffing these environments with appropriately trained professionals may require cross-industry partnerships with medical education institutions. As this convergence deepens, regulatory scrutiny is likely to increase, with implications for talent development, operational protocols, and consumer safety standards (Euromonitor International, 2023).

As beauty spaces begin to resemble medical environments, the stakes for consumer trust grow exponentially. Visual cues like white coats, stainless steel counters, and diagnostic devices create expectations of clinical rigor, and any gap between perception and delivery can rapidly erode credibility. Hygiene standards, data privacy, professional training, and transparency must all rise to meet these expectations. Failure to do so not only diminishes the customer experience but also risks undermining their perception of the brand.

Expertise must outweigh aesthetics. While beautiful store design still plays a role in brand storytelling, it cannot replace the need for clinically credible service. Traditional sales tactics may no longer serve these environments. To succeed in this new reality, brands must shift their ethos from selling to serving. The retail experience should be defined by empathy, education, and care, not transactions. This includes offering diagnostic consultations without obligation to purchase, implementing membership-based care models, and creating environments that feel safe, welcoming, and aligned with clinical standards.

In this rapidly changing environment, medicalized beauty - a convergence of aesthetics and health care - is no longer an emerging niche but also a commercial imperative. Beauty concerns are reframed as physiological ones, and solutions are increasingly rooted in biotech, clinical protocols, and data-driven personalization. For legacy brands and new entrants alike, this demands a fundamental rethinking of the beauty model: not just in what is developed but also how it is retailed, supported, and scaled.

XVIII. The Consumer Journey

The consumer journey in a medicalized beauty model begins with discovery and education in the digital space. Consumers may first encounter science-backed messaging through dermatologists or medical experts on platforms like Instagram, YouTube, or TikTok, where content focuses on the efficacy and clinical foundation of new products or services. Website hubs and brand apps offer diagnostic quizzes and AI-driven consultations that help consumers assess skin needs, track conditions, or receive ingredient education. Wearable integration with devices like Oura or Apple Health allows the brand to provide real-time, bio-personalized product recommendations based on stress levels, hydration, sleep, or environmental exposure.

In the consideration phase, users may engage further with augmented reality (AR) or tele-dermatology experiences, consulting estheticians, registered nurses, or medical experts virtually. Seamless ecommerce integrations allow users to select curated regimens built on biometric or diagnostic input. These platforms could include subscription models where skincare evolves based on monthly skin assessments or seasonal biomarker changes.

As the consumer transitions into the physical retail environment, the journey becomes more tactile and immersive. A shopper enters a flagship or partnered retailer offering diagnostic kiosks or facial scans, which instantly recommend personalized treatments and products based on skin condition, hydration levels, and environmental exposure. Beauty advisors, trained in clinical onboarding, act as medical-adjacent experts, translating scan data into protocol suggestions. Physical merchandising reflects this personalization, with curated assortments for conditions like rosacea, melasma, or post-procedure care.

The post-purchase journey integrates both physical and digital follow-up. Users may receive reminders for check-ins through brand apps, schedule follow-up consultations, or upload new biometric data to refine their routines. This cyclical loop creates a closed feedback system between product, performance, and evolving consumer needs.

This integrated consumer journey creates a seamless and highly personalized beauty experience, one that empowers, educates, and builds long-term trust. It also allows beauty brands to tap into emerging health-tech ecosystems and redefine what consumer engagement looks like in the next era of beauty retail.

XIX. Conclusion

In conclusion, the medicalization of beauty marks a pivotal transformation in the industry, one driven by a consumer shift toward long-term wellness and scientifically validated results. Modern consumers seek products and experiences that support both immediate aesthetic outcomes and long-term health benefits. They are influenced by performance, efficacy, and personalization. This change reflects a broader cultural evolution, where beauty is increasingly viewed through the lens of medicine, longevity, and preventive care. For brands, the challenge is no longer simply about keeping up with trends but instead about integrating deeper scientific credibility, medical-grade ingredients, and holistic wellness principles into their core strategies to gain trust and credibility. Those that embrace this shift will not only meet current demand but will also future-proof their offerings for a generation that sees health and beauty as intrinsically linked.

By creating a centralized ecosystem, companies will be able to have the right framework of education, expertise, and consistency to remain competitive in this new era. This will provide an opportunity for them to also view their portfolio in a more strategic way that extends beyond the conventional boundaries. Acquiring expertise and technology from the medical and wellness fields is not just an opportunity; it is a necessity. Omnichannel innovation plays a crucial role in delivering this new vision of beauty. As physical retail spaces evolve and integrate wellness and clinical care models, the beauty sector must rethink how it connects with consumers at every touchpoint, such as through virtual diagnostics to in-store consultations mimicking med-spa experiences. Investing more in biologically driven formulations and not only clinical but also functional packaging will be key to building trust with the consumers of today and tomorrow.

Ultimately, the convergence of beauty, wellness, and medicine is redefining what it means to be a beauty brand in the 21st century. By adapting to this evolution through science-driven innovation, strategic partnerships, and forward-thinking retail experiences, beauty brands can play a vital role in consumers' lifelong wellness journeys. The medicalization of beauty is not a passing trend but rather a foundational shift that will continue to reshape the industry. Brands that rise to meet this moment will not only earn consumer trust but also help to redefine beauty as a pillar of holistic, preventive health in the years to come.

XX. Appendix

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