IA | INTERIOR ARCHITECTS

The Aesthetic Evolution

Designing for a New Era of Consumers

HumanX by IA Retail | January 2025

AUTHOR

Carlotta Dove
Director of Consumer Experience
IA Retail

Get in Touch with Carlotta:
c.dove@interiorarchitects.com

CONTRIBUTORS

Ryan Benson
Design Director, IA Retail

Emma Morris
Designer, IA Retail

Caitlin Eicher
Interm. Designer, IA Retail

Ron Singler
Creative Director, IA Retail

The Aesthetic Evolution

HumanX by IA Retail is a research initiative dedicated to transforming design through a deep understanding of consumer needs and behaviors. We delve into industry trends, challenges, and opportunities that shape the marketplace.

In this third installment, we are taking a deep-dive into the world of medical aesthetics, exploring consumer attitudes and design solutions for clinics, medical spas and treatment centers.

The global market for medical aesthetics is currently being valued at $20 billion and expanding at 8%. As consumer interest in wellness continues to surge, brands are uniquely positioned to capture a wider audience—provided they know how to strategically appeal to evolving preferences.

How can brand, experiences and environment interplay to tap into a new era of aesthetic seekers?

Join us as we uncover the answer.

DATA COLLECTION

Unlike traditional research which informs on the state of things, HumanX insights are geared to be future-centered, actionable and practical for our retail clients to leverage. That's why we enrich our research with both academic and design exploration, starting with a large-scale survey analysis and ending with an exploratory design innovation sprint.

Evolving Archetypes

PAGE 5

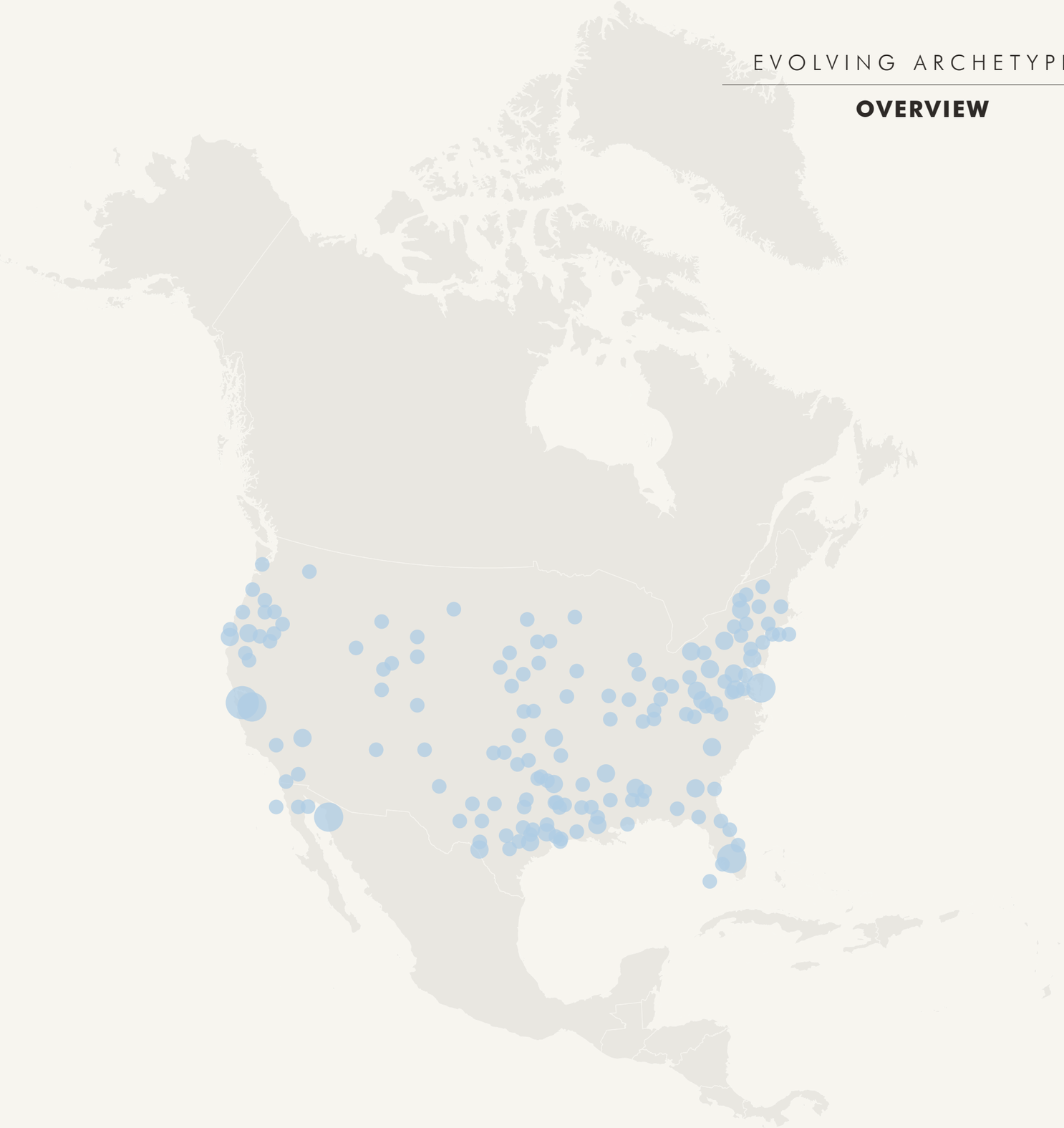
To pinpoint core consumer groups with high potential for engagement in the medical aesthetic market, along with promising adjacent segments.

Crafting Well-topia

PAGE 15

To innovate on future design and experience solutions for medical aesthetic providers. Includes journey mapping, zonal strategies and renders.

OVERVIEW



Insights were developed using a multi-faceted data collection approach: existing external research provided a foundation in industry trends, while internal discussions distilled actionable project learnings.

Social listening captured real-time consumer sentiment and emerging trends, and a survey of 485 consumers offered direct feedback on preferences and behaviors.

Respondents were carefully selected to mirror the US census in regards to age, gender, household income and location, to allow for generalization of findings to the wider US population (margin of error +/- 4.5)

OVERVIEW

Our research identified four core archetypes that speak to the changing attitudes of consumers towards medical aesthetics. The two major groupings included the Somatic Sage and the Elite Escapist, with the Worried Well and the Wanderlush making up smaller portions of the population.

THE SOMATIC SAGE

49%

WARMTH - PERSONALIZATION - HOLISTIC WELLBEING

THE ELITE ESCAPIST

34%

EFFICIENCY - INDULGENCE - SOCIAL SHARING

THE WORRIED WELL

12%

HYPER-AWARE - HEALTH -OBSESSED -LONGEVITY

THE WANDERLUSH

5%

EXPERIENCE-SEEKER - REVITALIZATION - COMFORT

ESTABLISHED ..... EMERGING

"I seek aesthetic treatments that offer a holistic, welcoming experience, connecting to my well-being."

"I value relaxation, natural results, and practices that nurture my inner balance."

ABOUT ME

Frequent visitors to aesthetic centers, committed to holistic wellness and beauty, prioritize non-invasive treatments paired with self-healing practices. They value expert guidance and professional care delivered in a warm, welcoming environment.

ATTRACT ME

Warm, welcoming 'sanctuary' vibes

Tailored consultations emphasizing wellbeing

Transparent sourcing and ingredients

THE SOMATIC SAGE

DRIVERS

FREQUENT USERS

Most experienced in medical aesthetics, undergoing regular treatments.

46% receive aesthetic treatments multiple times a month.

A WARM ATMOSPHERE

"Looking for a brand that feels clinically safe, with lots of privacy and a calm, soothing ambiance. I want to feel in good hands."

59% see a clinical or sterile atmosphere that feels unwelcoming as the biggest barrier to choosing an aesthetic provider.

SNAPSHOT

DEEP UNDERSTANDING OF INGREDIENTS

"I want to know more about what goes into my body. Is there a way to provide me with personalized info?"

31% view virtual pre- and post- support as the biggest driver for choosing an aesthetic provider.

TURNED OFF BY STERILE

"Treatment providers have taken 'sterility' and 'cleanliness' so far that the space feels cold and unwelcoming."

THE ELITE ESCAPIST

EFFICIENCY - INDULGENCE - SOCIAL SHARING

"Beauty treatments are my 'me-time,' but I'd love to share the experience with friends."

"Personalization is key, along with understanding my needs before I even walk in."

ABOUT ME

Experienced with aesthetic treatments, seeking a brand that offers the perfect blend of top-tier, innovative services, relaxation, and a rejuvenating community experience.

ATTRACT ME

Digitally enhanced personalization

Indulgent treatments curating respite

Immersive, community-driven experiences

ELITE ESCAPIST

DRIVERS

AESTHETICS AS AN ACT OF SELF-CARE

"I often find myself too stressed to prioritize myself - looking for a space that allows me to disconnect."

34% crave aesthetic treatments that offer luxurious escapes to disconnect from daily life and rejuvenate.

EMBODYING ALL SENSES

"Introduce steamed towels, various aromas, and after spa amenities such as lotion on the go or essential oils for aroma."

54% prefer immersive treatments with customizable lighting, music and aromatherapy, and are looking for holistic mental and stress relief.

SNAPSHOT

BRINGING FRIENDS ALONG

"Self-care is something to be celebrated, not be ashamed of. Love the idea of inviting my friends to come along, chat, connect while investing in myself."

51% like to take their time when visiting treatment centers and make use of amenities such as cafes and lounges.

PERSONALIZATION THROUGH DIGITIZATION

"Assess my needs and preferences before I walk into the door, and match treatments to my vibe."

42% view self-guided digital tools for tracking treatment progress and accessing information as the biggest driver for choosing an aesthetic provider.

THE WORRIED WELL

ANXIOUS - HEALTH AND SAFETY - LONGEVITY

"I would be interested in dipping my toes into aesthetics, but it needs to benefit my long-term needs, and be clinically safe and sound."

"Where do I start in my journey?"

ABOUT ME

Approaching middle age and interested in future-proofing inside and out. Limited knowledge of treatment options and unsure where to start.

ATTRACT ME

Expert guidance to ease concerns and build confidence

Pre- and post consultation and caretaking

THE WORRIED WELL

DRIVERS

LIMITED EXPERIENCE

"I need to know treatments and machines are up to standard before committing."

55% report having never undergone aesthetic treatments.

IN GOOD HANDS

"An environment that feels clinically safe, with lots of privacy and a calm, soothing ambiance."

48% report that anxiety about procedures or uncertainty regarding safety is their biggest barrier

SNAPSHOT

SHORTER STAYS TO START WITH

"As I'm getting comfortable with visiting aesthetic treatment centers, I want practitioners to focus on efficiency."

34% prefer to be in and out quickly when getting aesthetic treatments.

LONGEVITY BENEFITS OF INTEREST

"I want to know how can aesthetics benefit my long-term wellbeing. Can improvements be tracked and measured?."

42% view self-guided digital tools for tracking treatment progress and accessing information as the biggest driver for choosing an aesthetic provider.

THE WANDERLUSH

TRAVEL EXPERIENCES - TRANSPARENCY - COMFORT

"I am passionate about combining travel with both inner and outer rejuvenation."

"Transparency and safety in treatments and prices is super important for these ad hoc visits."

ABOUT ME

Seeks treatments as part of their travel experiences, rounding of a full program of growth and exploration. Looking for unique treatments in familiar settings.

ATTRACT ME

Welcoming entry and storefront experience, with intuitive wayfinding

Expert guidance to ease concerns and build confidence

Transparency in treatments and pricing

THE WANDERLUSH

DRIVERS

AUTHENTIC TRANSPARENCY

"When I'm traveling, I'm looking for ease and transparency —think packages, in-person chats and discounts."

48% see limited knowledge or not being sure where to start as the biggest barrier to visiting medical aesthetic providers.

TRAVEL-BASED USERS

"I like exploring wellness and aesthetic offers while I travel - something different to try."

33% indulge in aesthetic treatments 1-2 times per year.

SNAPSHOT

ENTICING ENTRY

"Need ease of entry - hard to know what's inside the store from outside. Would be more likely to stay longer if there was a cafe or community space."

42% say that lack of transparent pricing has led to concerns around cost in the past.

SKEW TOWARDS MALE DEMOGRAPHICS

53% of the wanderlush cohort is male - and have reported looking for more targeted promotion to their needs.

COMMON THREADS

Despite varied experiences and preferences, all consumer groups seek brands that holistically address their needs in a warm, welcoming space. Trust is key—through transparent treatments, pre- and post- treatment care-taking, and personalized support that reduces anxiety, boosts confidence, and fosters celebratory self-care.

Aesthetics as a holistic practice of self-care in trying times

More than Skin Deep

From hidden to visible, and from isolated to connected and celebrated

Personalization

Integrating tech and wearables to personalize

Celebratory Experiences

Community

Embodying the Whole Human

Anxiety and lack of confidence on where to start as key barriers deterring potential consumers

Reducing Anxiety and Building Confidence

How can we re-imagine medical aesthetic spaces as havens of self-care, built on trust, personalization, and a sense of community?

How do we shape experiences that both serve existing consumers and attract new ones?

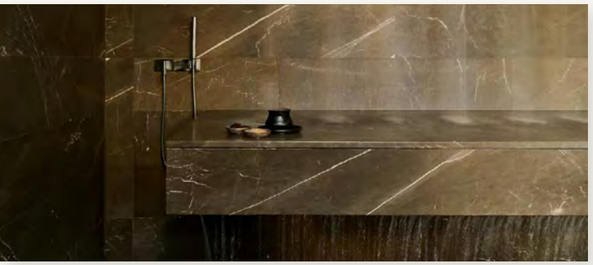
Introducing *Well-Topia*, a verdant landscape growing self-care in all facets of the human experience—aesthetic, embodied, and rooted in community.

EXPERIENCE DRIVERS

- sensory enrichment
  - clean, not sterile
  - holistic perception
- empowered self-care
  - authenticity
  - community
- educational nourishment
  - always approachable
  - care-taking
- tailored personalization
  - predictive AI
  - storytelling

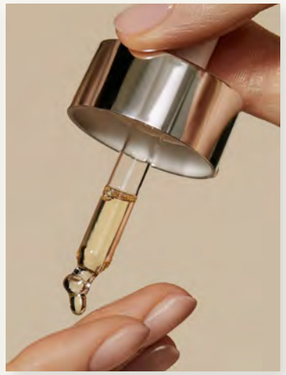
VISUAL POSITION

COMFORTING



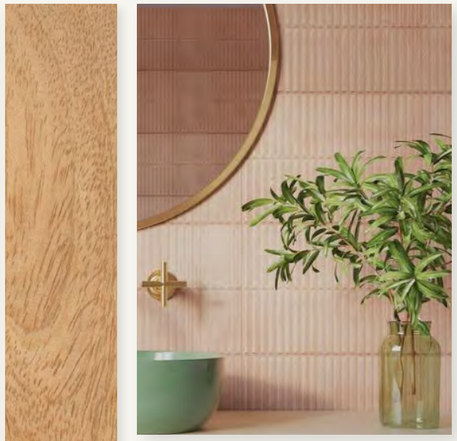
INCLUSIVE

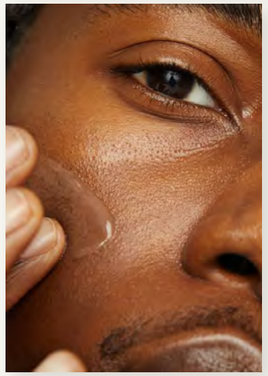
NATURAL

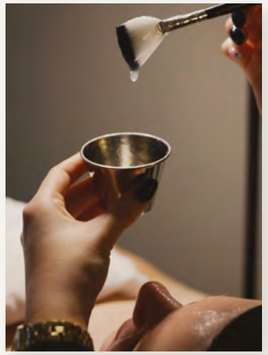


CONSULTATIVE

PERSONALIZED







SENSORIAL

CATERING TO THE SOMATIC SAGE

PRIVATE CONSULT

Trusting Assurances
- private conversations/concerns
- can help to further build personal profile, ease anxiety, build trust

Rejuvenation Station
- (independently owned) offering selection of juices, espresso drinks, bubbles and healthy snacks
- shared space at storefront for separate entry, open to waiting area/lounge

BOH/PREP SPACE

Prepare
- space to service cafe/juice bar
- sterile storage & prep space for procedures

CAFE/ JUICE BAR

REST ROOM

ARRIVAL

ENTRY

CHECK-IN DESK

Seamless Transitions
- clear signage/ identification
- dedicated parking (where possible)

Always Approachable
- non-toxic, branded (subtle) curated scent
- ease of wayfinding

Concierge to Calm
- check-in via attendant
- clear sightlines from entry for personal greeting
- BOPIS pickup point

PRE-TREATMENT PODS

Pampered Pre-Treat
- semi-private spaces for pre-consultations and smaller treatments
- soft lighting, comfortable reclining chair, small fridge
- digital/AI visualization of treatment

WAITING AREA/ LOUNGE

Rest and Respite
- comfortable, varied seating groups
- natural elements and warm lighting, access to daylight
- clean but not clinical - layered
- combined with Cafe/Juice Bar - a sense of community, space for gathering

DIGITAL/ ONLINE

Ease and Transparency
- realistic photos of the space
- transparent pricing, duration, and benefits
- verified customer reviews
- appointment management app
- personalized reminders with care instructions
- custom digital profile for preferences and health info

EXIT

Maintaining Brand Connection
- follow-up appointments as-needed
- free product samples, discounts for future visits
- post-treatment care instruction and follow-up

RETAIL

Retail Therapy
- curated medical-grade skincare
- personal recommendations
- demonstration/test area
- easily accessible for grab & go, post-treatment add-on

TREATMENT ROOMS

Healing Havens
- equipped with cutting-edge equipment/tech
- calming palette, natural materials where possible
- soft/subdued lighting

CATERING TO THE ELITE ESCAPIST

PRIVATE CONSULT

Trusting Assurances
- private conversations/concerns
- can help to further build personal profile, ease anxiety, build trust

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CATERING TO THE WORRIED WELL

PRIVATE CONSULT

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CATERING TO THE WANDERLUSH

DIGITAL/ ONLINE

Ease and Transparency
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- transparent pricing, duration, and benefits
- verified customer reviews
- appointment management app
- personalized reminders with care instructions
- custom digital profile for preferences and health info

ARRIVAL

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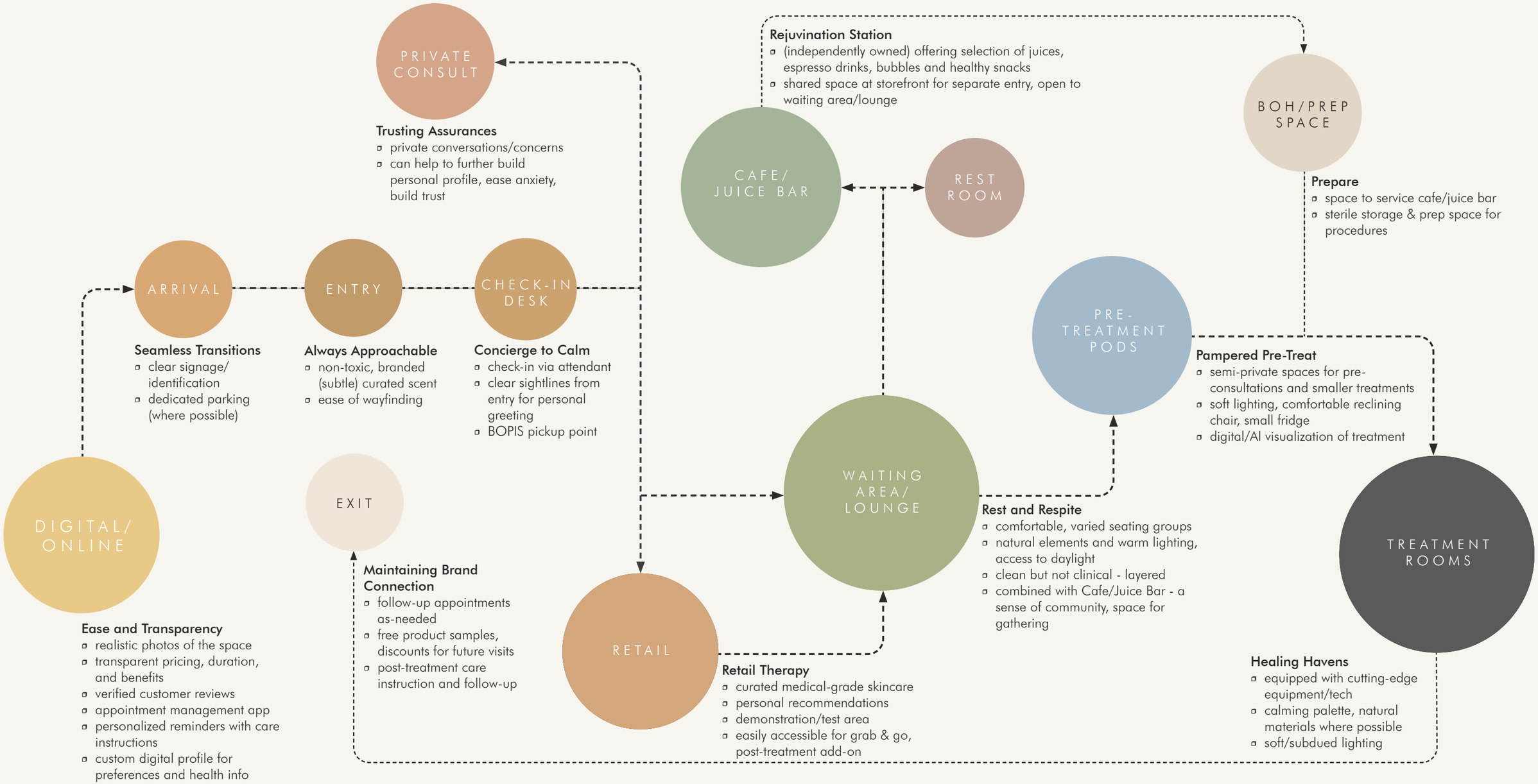
CONSUMER JOURNEY



ALWAYS APPROACHABLE

clear signage and branding visible from parking lot/street

natural materials used on exterior to reflect interior aesthetic

designated parking available adjacent to store, validated parking

corner entry, business hours displayed clearly

CONCIERGE TO CALM

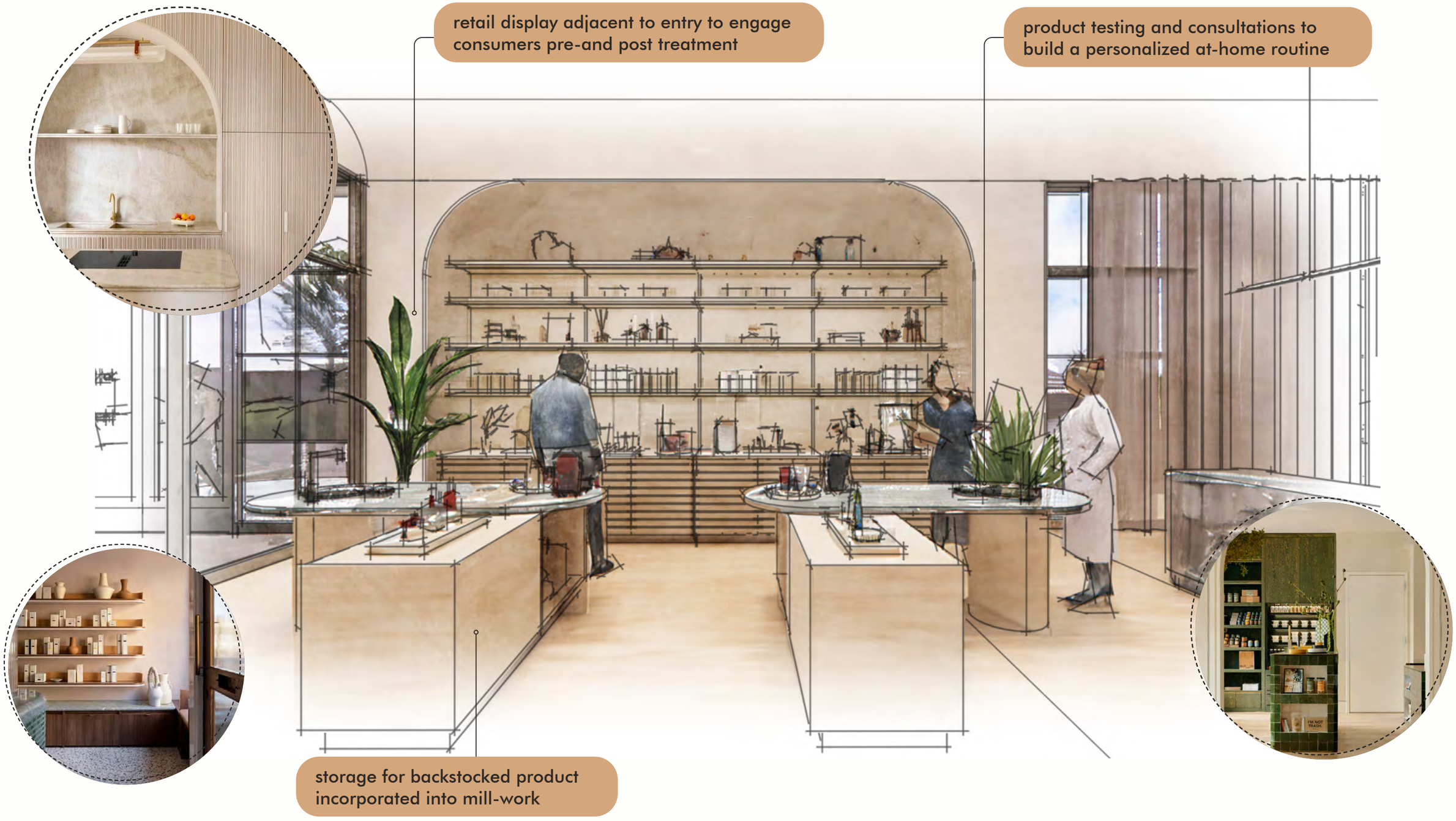
use of semi-sheer curtains to soften/diffuse light

staffed check-in desk with mobile options for service-first mentality

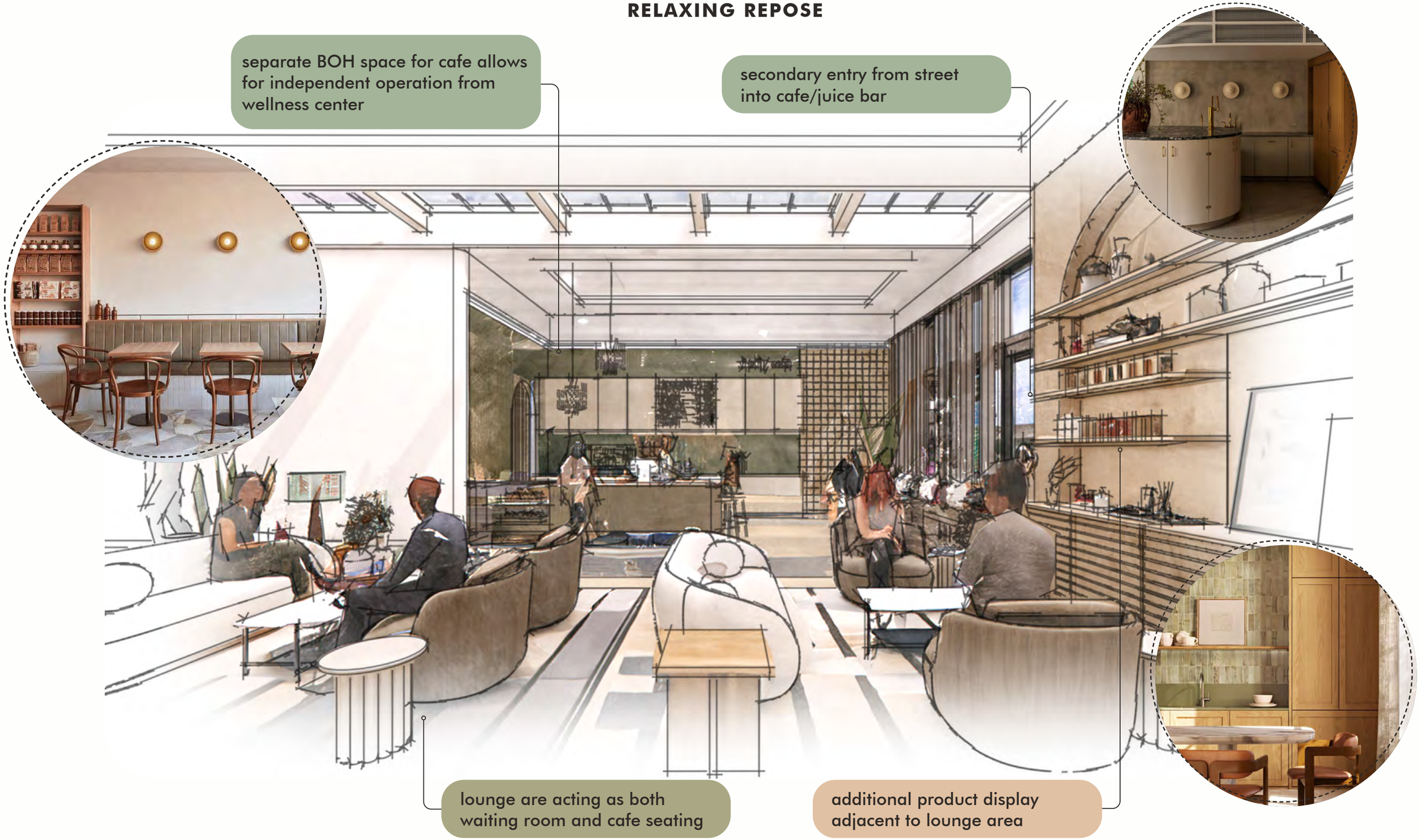
private consultation area available for sensitive queries

product testing and demonstrations to foster educational nourishment

RETAIL THERAPY



RELAXING REPOSE



PAMPERED PRE-TREAT

moveable partitions between pre-treat pods control level of privacy and accommodate social groups

dry-bar in each pod to offer beverages and snacks pre-treatment

semi-private spaces for consultations to inform and ease any anxieties around upcoming procedures

HEALING HAVENS

cave lighting gives a relaxing glow to each treatment room as opposed to harsher overhead lighting

niche for product display and additional storage

non-permeable materials used in treatment rooms to maintain sterile environment

AUTHOR

Carlotta Dove
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Get in Touch with Carlotta:
c.dove@interiorarchitects.com

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Into the Next Layer

Aesthetic brands walk a fine line between contrasting identities: providing part clinics, part sanctuaries, equal parts glamorous retreat and potential source of anxiety.

Historically, design choices leaned toward a clinical aesthetic to reassure consumers about the safety of the procedures offered. Our research reveals that next-generation consumers seek reassurance through a new approach—one that emphasizes sensory-rich environments, digitally integrated pre- and post-operative care, and immersive visual storytelling, all while celebrating self-care as a community-centered value.

To meet the growing demand for safe, wellness-driven beauty treatments, brands must move beyond superficial offerings. This requires a deep understanding of consumer needs, motivators, and perceived barriers, while focusing on experience design and integration that underscore their unique value propositions in an increasingly competitive landscape.

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