

POLISHED TO PERFECTION: INSIDE THE NAIL TRENDS WOMEN CAN'T QUIT

Driven by both practicality and pleasure, today's beauty consumer views nail care as one of the most essential beauty categories, combining self-care with high-impact results. The Benchmarking Company's May 2025 survey of 3,000+ US females reveals that not only are 96% regularly polishing their nails at home or in salon, but 97% are investing in a nail care routine that goes far beyond polish. From exfoliators for hands and feet, to relaxing soaks, nourishing serums and mess-free applicators, she strives for salon-perfect fingers and toes. From trending nail colors and finishes to the products she uses most, TBC reveals the latest nail care trends, consumer preferences, and at-home manicure and pedicure habits in this month's Beauty by the Numbers™.

90% of respondents do their nails at home!

43% exclusively do their own mani-pedis at home and 47% say they do a combination of nail services and DIY

The Appeal of At-Home Nail Treatments = Self-Care + Affordability

- 87% gravitate to at-home nail treatments because it is on her schedule
- 85% offers a cost-effective alternative to a salon treatment
- 76% feels like an act of self-care

That At-Home Mani Movement: Why She Opts for At-Home Nail Care

- 77% affordability
- 54% convenience
- 44% practicality
- 31% fun
- 30% enjoyable

The DIY Woman Seeks Pro Results At-Home

- 79% are interested in at-home nail strengthening treatments
- 76% cuticle treatments
- 67% nail serums
- 62% at-home gel kits
- 55% press-on nails

At-Home Products with the Most Appeal

- Hand & foot creams
- Hydrating foot mask
- Foot masks/peels for exfoliation
- Mess-free applicators (for polish, nail design)
- Hand masks for moisturization
- Soaks
- Cuticle serums

Intriguing Innovations She's Interested in Trying

- 79% eco-friendly and sustainable nail polish products
- 79% hybrid formulations that deliver color and benefits such as strengthening
- 66% mix-and-match nail art capsule kits that include adhesive, tools and customized elements
- 65% non-toxic, vegan and clean nail color
- 63% heat or temperature sensitive polishes – changes based on body temperature
- 55% nail diagnostic tools – at-home scanning for nail health assessment

Polish is the Pinnacle of Her At-Home Routine

- 83% have bought nail polish in the past year for DIY or touch-ups
- 62% say it takes between 15-45 minutes to polish fingers/toes at home
- 35% polish nails at home weekly/27% twice a month

Perfect Match Kit – Products She'd Like to See Bundled with Her Favorite Hue

- 87% nourishing cuticle oils
- 74% probiotic hand creams
- 71% peptide-rich base coats
- 64% aromatherapy oils

Fave Mani-Colors

- 36% pink
- 14% multi-color
- 11% red
- 7% neutral or purple
- 5% clear or blue

She's Buying Polish to DIY, but also...

- 82% topcoat
- 76% nail clippers, trimmers, polish remover
- 74% nail file/emery boards
- 71% base coat
- 68% hand cream
- 55% foot cream
- 53% cuticle clipper/trimmer
- 51% cuticle oil

Her Home Mani Spend

- 72% pay between \$6-\$15 per bottle of polish
- 11% spend \$16-\$20
- 54% buy salon-polish brands

Her DIY Pet Peeves

- 49% sloppy polishing/smudging
- 45% chipping/peeling
- 40% polishing with my non-dominant hand
- 38% doesn't last as long as a salon manicure
- 34% finding time to polish/not as relaxing as a salon
- 32% takes too long to dry!

Her Nail Polish Wish List

- 77% long-lasting color
- 74% dries fast
- 67% easy to apply
- 65% no chipping for 7 days
- 49% shiny
- 38% unique colors/trendy formulations

Her Cabinets are Full of Colors & More Conscious Choices

- 87% own 7 or more bottles of nail polish
- 68% sometimes or do not match their fingernail polish to their toes (reason to own more colors!)
- 64% always or sometimes seek out polishes without harmful chemicals or toxins

What She's Tried the Past Year

- 47% gel nails
- 46% fast dry polish
- 43% French manicure
- 42% press-on nails
- 40% glitter nails
- 35% nude nails
- 33% matte polish
- 28% ombre nails

Top Nail Polish Brands Purchased

| *2013 comparison data from The Benchmarking Company's 2013-14 PinkReport™ Nailed: The Allure of Nail Color special report study | 2013* | 2025 |
|---|-------|------|
| OPI | 75% | 76% |
| Essie | 49% | 62% |
| Sally Hansen | 63% | 54% |
| Revlon | 53% | 34% |
| Wet n Wild | 37% | 32% |

Where She Seeks Inspiration for New Nail Looks

| | Gen Z | Millennials | Gen X | Baby Boomers |
|--|-------|-------------|-------|--------------|
| TikTok | 51% | 33% | 21% | 6% |
| Instagram | 43% | 44% | 32% | 13% |
| Friends/Family | 23% | 31% | 30% | 28% |
| Facebook | 16% | 23% | 23% | 15% |
| YouTube | 20% | 18% | 14% | 7% |
| At stores | 23% | 23% | 22% | 19% |
| Online browsing on Amazon, other sites | 25% | 27% | 25% | 17% |

Finishes She Favors

- 79% gloss
- 57% shimmer
- 42% glitter/pearlized
- 41% sparkle/matte
- 34% metallic
- 32% glass top
- 31% sheer
- 30% cream

Got Great Claims Like These? You Need Them!

Contact The Benchmarking Company to learn about consumer in-home use testing (IHUT) for marketing claims and risk mitigation.

"92% of users said their polish didn't chip after 10 days."

"97% of women said their skin looked radiant and felt softer in 28 days."

Results
91% said treatments removed unwanted brassiness
86% said hair looks brighter and more vibrant
85% said hair looks visibly healthier
80% said hair feels less brittle and looks less damaged

Interested in customized beauty consumer research for your brand? Call 703.871.5300 or visit [benchmarkingcompany.com](https://www.benchmarkingcompany.com) or info@benchmarkingcompany.com for information on Beauty/Personal Care Product Testing and specialized consumer research.

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Beauty & Personal Care Consumer Research

Data based on The Benchmarking Company original May 2025 online research study of 3,000+ US female beauty buyers.