

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

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:**

The Appeal of At-Home Nail

Why She Opts for At-Home Nail Care 77% affordability 54% convenience

- 44% practicality **31%** fun
- 30% enjoyable



such as strengthening



At-Home • 79% are interested in at-home nail strengthening treatments

The DIY Woman

Seeks Pro Results

- 76% cuticle treatments 67% nail serums
 - **62%** at-home gel kits
 - 55% press-on nails

Most Appeal 1. Hand & foot creams 2. Hydrating foot mask

At-Home Products with the

- 3. Foot masks/peels for exfoliation 4. Mess-free applicators (for polish,
- nail design)
- 5. Hand masks for moisturization 6. Soaks
- 7. Cuticle serums

Perfect Match Kit – Products

87% nourishing cuticle oils

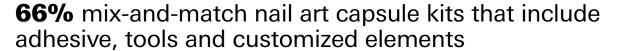
74% probiotic hand creams

71% peptide-rich base coats

64% aromatherapy oils

She'd Like to See Bundled with

79% eco-friendly and sustainable nail polish products



79% hybrid formulations that deliver color and benefits

- 65% non-toxic, vegan and clean nail color
- 55% nail diagnostic tools at-home scanning for nail health assessment

changes based on body temperature

63% heat or temperature sensitive polishes -

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

36% pink

Fave Mani-Colors

11% red **7%** neutral

14% multi-color

5% clear or blue

or purple

- Her Home Mani Spend • **72%** pay between \$6-\$15 per bottle of polish
 - 11% spend \$16-\$20 **54%** buy salon-polish brands

Her Nail Polish Wish List

65% no chipping for 7 days

38% unique colors/trendy

77% long-lasting color 74% dries fast 67% easy to apply

49% shiny

formulations

- What She's Tried

the Past Year

• **47%** gel nails

46% fast dry polish

43% French manicure

42% press-on nails

33% matte polish

28% ombre nails

- 40% glitter nails 35% nude nails
- - **Finishes She Favors 79%** gloss

57% shimmer

41% sparkle/matte

42% glitter/pearlized

- 31% sheer

and risk mitigation.

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

She's Buying Polish to DIY, but also... • **82%** topcoat • 76% nail clippers, trimmers, polish remover • 74% nail file/emery boards **55%** foot cream

• 71% base coat • 68% hand cream

Her Favorite Hue

• 53% cuticle clipper/trimmer

• **51%** cuticle oil

- Her DIY Pet Peeves
- 45% chipping/peeling • 40% polishing with my non-dominant hand

as a salon

32% takes too long to dry!

Her Cabinets are Full of Colors &

• 49% sloppy polishing/smudging

More Conscious Choices

• **87%** own 7 or more bottles of nail polish

68% sometimes or do not match their

• 38% doesn't last as long as a salon manicure

• 34% finding time to polish/not as relaxing

more colors!) • **64%** always or sometimes seek out polishes without harmful chemicals or toxins

fingernail polish to their toes (reason to own

Top Nail Polish Brands Purchased *2013 comparison data from The

2025

76%

62%

2013*

75%

49%

30%

23%

14%

22%

25%

Results

brassiness

86% said hair

91% said treatments removed unwanted 28%

15%

7%

19%

17%

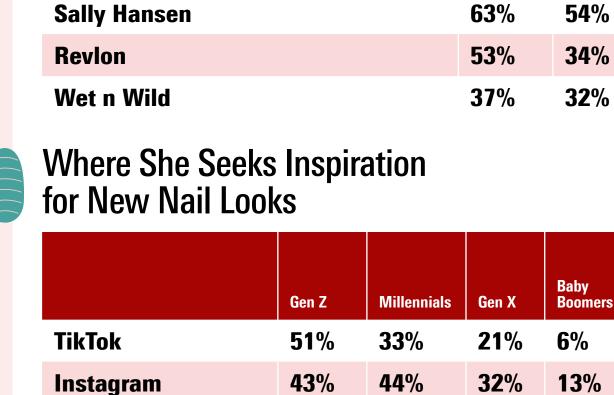
Benchmarking Company's 2013-14

Color special report study

OPI

Essie

PinkReport™ Nailed: The Allure of Nail



23%

16%

20%

23%

25%

31%

23%

18%

23%

27%

34% metallic 32% glass top

"92% of users said their polish didn't chip after 10 days." '97% of of women said their

Friends/Family

Online browsing on

Amazon, other sites

Facebook

YouTube

At stores

softer in 28 days."

skin looked radiant and felt



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

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