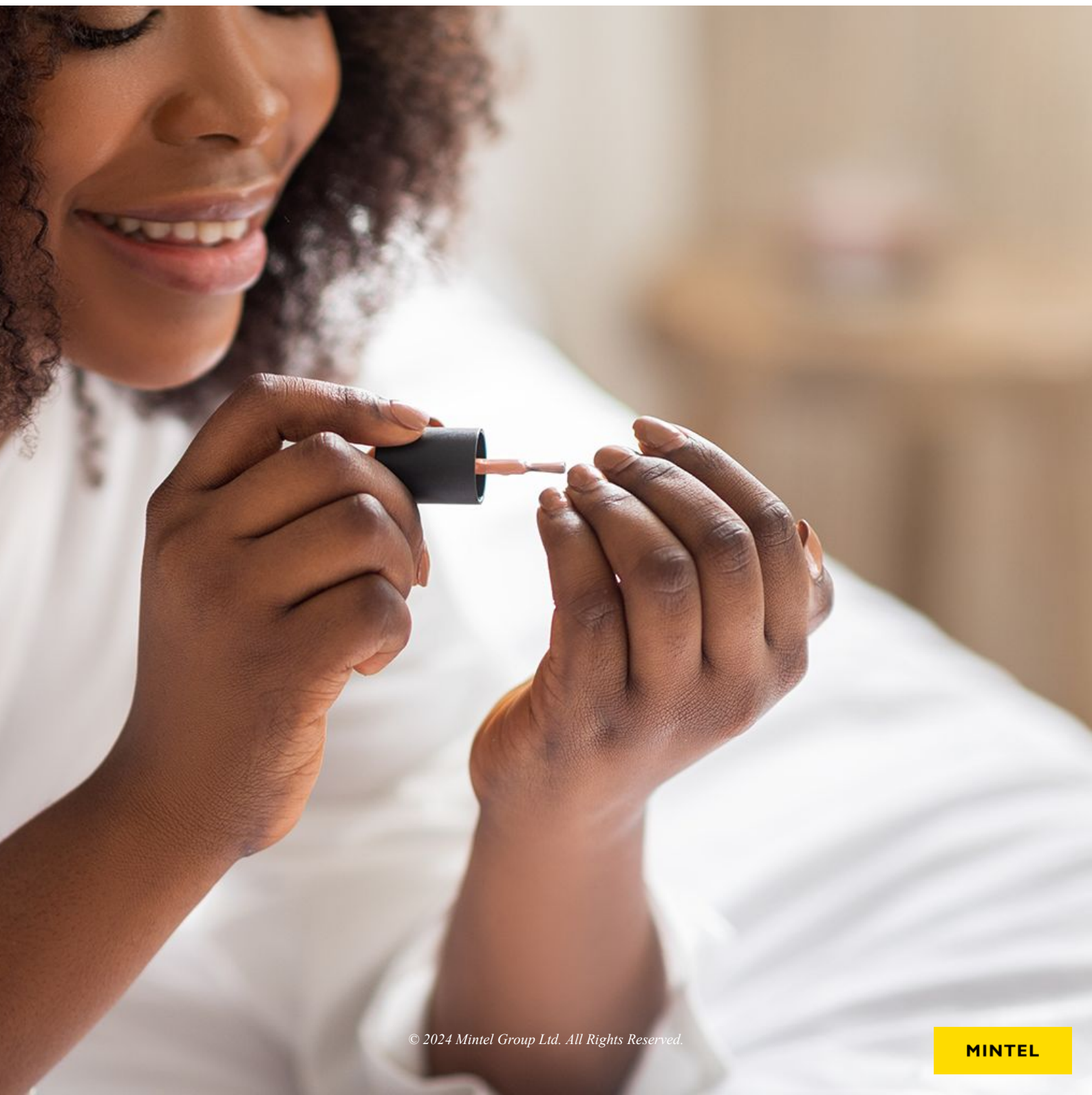


NAIL COLOUR AND CARE – CANADA – 2023

Consumers are reevaluating nailcare spending and are looking to brands to reduce common barriers like lack of time or skill to boost perceptions of value.



Meghan Ross, Senior
Research Analyst - Home
& Beauty



Nail Colour And Care - Canada - 2023

This report looks at the following areas:

- Nail service participation
- DIY vs salon visits for nail services
- Professional salon visit motivators
- Nail products and tools used at home
- Nail product shopping channels
- Willingness to pay for nail innovations and benefits
- Nail colour and care attitudes and behaviours

Overview

Consumers are making adjustments to their nailcare routines as a result of current economic conditions. Over half (56%) have had to cut back on nailcare due to budget. While discretionary spending on beauty products is assessed more carefully and salon visits are scaled back to save costs, nailcare can be positioned as an affordable way to boost confidence and moods.

The emphasis on clean formulations is somewhat muted in the category, with 64% agreeing that how well a nail product works is more important than its ingredients. Consumers may be apprehensive that cutting out traditional ingredients could compromise quality and longevity, so they will need reassurances from "clean" brands that this is not the case.

There is an opportunity to focus on products that promote nail health. Given the fact that many are opting for more natural nails, brands supporting healthy-looking nails without



Consumers are reevaluating nailcare spending and are looking to brands to reduce common barriers like lack of time or skill to boost perceptions of value.

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having to hide under polish will resonate. Consumers who rely on more damaging services can also be supported with products that protect and preserve nail health.

There is a need for further educational supports to boost confidence and give consumers the push they need to care for their nails more effectively. Strong interest in watching video tutorials shows that consumers have an appetite for additional learning in this category.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer Trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Nail services done in the past 12 months

- Tried and true basic services are relied upon most
 - Graph 1: nail services done in the past 12 months, 2023
- Nailcare continues to skew female
 - Graph 2: nail services done in the past 12 months, men vs women, 2023
- Encouraging expanded repertoires
- Artificial nails have strong appeal for younger consumers
 - Graph 3: nail services done in the past 12 months, by age and gender, 2023
- South Asian consumers are an involved (and growing) demographic
 - Graph 4: nail services completed in the past 12 months, South Asian consumers vs overall, 2023

DIY vs salon nail services

- Ease of application encourages more at-home services
 - Graph 5: DIY nails vs salon services, 2023
- Salon treatments are becoming accessible to home users
- Cost and convenience are salon barriers
- Formats positioned as time-saving alternatives to salon visits
- Confidence and comfort align with at-home services for women
 - Graph 6: DIY nails vs salon services, men, 2023
 - Graph 7: DIY nails vs salon services, women, 2023
- Younger consumers are more likely to take a hybrid approach to nail services
 - Graph 8: those who have done their nails at home and at a salon, by age, 2023

Professional salon visit motivators

- Professional nail services are relied upon for pampering and precision
 - Graph 9: reasons for having nail services done at salons, 2023

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- Helping consumers replicate professional results
- Traditional salon services are heading home
- Self-care is a strong driver for salon visits for women
 - Graph 10: reasons for having nail services done at salons, men vs women, 2023
- Physical limitations impact nail service choices
 - Graph 11: those citing not being able to easily reach/see toenails as a motivator for salon pedicures, age, 2023

Nail products used at home

- Traditional formats are most commonly used
 - Graph 12: nail products used at home, 2023
- Younger consumers are open to a wider variety of nail formats
 - Graph 13: nail products used at home, by age, 2023
- Shaping tools are relied upon by most
 - Graph 14: nail tools used at home, 2023
- Identifying multiple benefits to boost value
- Women's stronger engagement with the category encourages larger tool repertoires
 - Graph 15: nail tools used at home, men vs women, 2023
- Tool use is high among all age groups, but needs vary
 - Graph 16: nail tools used at home, by age, 2023

Shopping for nail products: online vs in-store

- Consumers are making use of both online and in-store purchasing options
 - Graph 17: location of most recent nail product purchase, 2023
- Older consumers rely on in-person shopping
 - Graph 18: location of most recent nail product purchase, by age, 2023
- Remote workers rely more heavily on online channels
 - Graph 19: location of most recent nail product purchase, by work location, 2023

Nail product trade-up motivators

- Consumers are willing to pay for convenience, longevity and health
 - Graph 20: willingness to spend more for nail product features, 2023
- Is there a need to trade off between durability and convenience?
- Nail tattoos extend wear time for the brave
- Simplicity and beginner-friendly options will build confidence and skills
- Easy-to-use formats appeal to consumers looking for simple options
- Women are more likely to value nail product improvements
 - Graph 21: willingness to spend more for nail product features, men vs women, 2023
- Time is money for quick-dry nail product buyers
- Convenience is particularly important for older nail consumers

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- Graph 22: willingness to spend more for nail product features, by age, 2023

Nail colour and care attitudes and behaviours

- Prioritizing performance
- Natural ingredient claims are linked to health and the environment
- At-home nailcare is positioned as the cheaper salon alternative
- Brands can boost their appeal by offering consumers more
- Interest in tutorials is not limited to only young women
 - Graph 23: those who enjoy watching nail tutorials online, by age, 2023
- Reviews help reassure
- Building communities online to build trust and engagement offline
- Embracing a natural look
- Natural, but better

COMPETITIVE STRATEGIES

Launch activity and innovation

- Nourishing products can reassure consumers concerned about nail damage
- Offer gentler alternatives to traditionally harsh formats
- Taking inspiration from other BPC categories for health claims
- Supplements to support nail health
- Opportunities to expand to adjacent categories...
- ...or partner up for collaborations
- Alternative formats can be explored as a way to keep the category fresh

Marketing and advertising

- Sustainability initiatives are typically linked to health claims
- Tackling environmental concerns with a multi-pronged approach
- Eco-friendly packaging options
- Incentivizing sustainability
- Men's nailcare options expand
- Personalization options broaden the possibilities for self-expression
- Technology is making it easier to connect with shoppers

THE MARKET

Market drivers

- Inflation is cooling, but remains high
- Consumers are feeling the financial pinch

- Graph 24: perceived financial health, 2023
- Positioning nailcare as an affordable treat
- The shift towards remote work has impacted nail services
 - Graph 25: work location, 2023
- Immigration patterns will alter the consumer landscape
 - Graph 26: distribution of foreign-born population by region of birth, 1996-2036 (projected)
- Take inspiration from expanded shade ranges of colour cosmetics
- Acknowledging cultural traditions can forge wider connections
- Canada's aging population will have varied nailcare needs
 - Graph 27: population aged 0-14 and 65+, 1988-2068*
- Considered design choices can improve accessibility for older consumers

APPENDIX

- Market definition
- Consumer Research Methodology
- Consumer qualitative research
- Generations
- Abbreviations and terms

Disclaimer

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Help desk

<u>UK</u>	<u>+44 (0)20 7778 7155</u>
<u>US</u>	<u>+1 (312) 932 0600</u>
<u>Australia</u>	<u>+61 (0)2 8284 8100</u>
<u>China</u>	<u>+86 (21) 6386 6609</u>
<u>India</u>	<u>+91 22 4090 7217</u>
<u>Japan</u>	<u>+81 (3) 6228 6595</u>
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