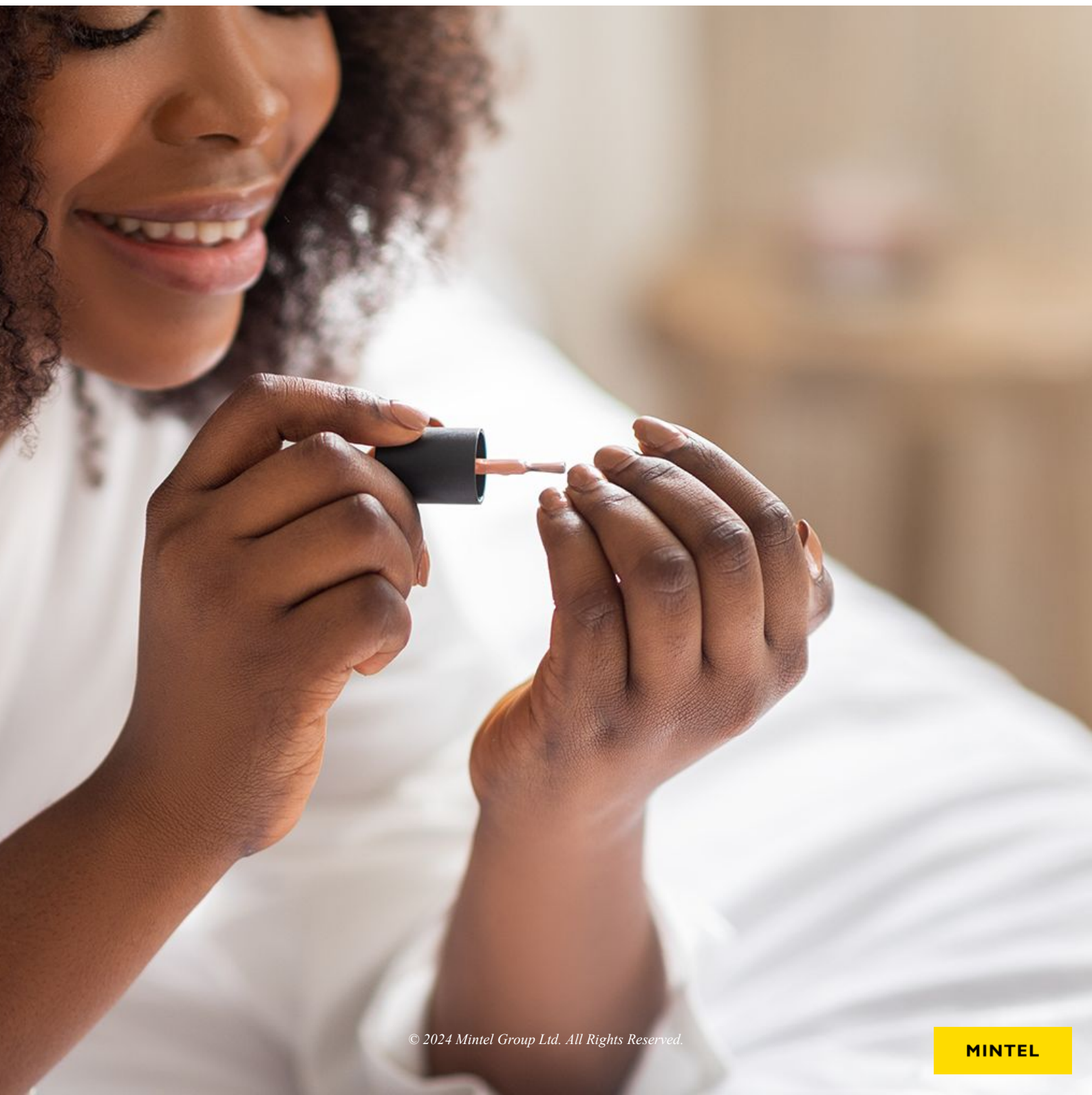


# NAIL COLOUR AND CARE – CANADA – 2023

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.

**BUY THIS REPORT NOW**


**€4400.00 | £3695.00 | \$4995.00\***

[store.mintel.com](https://store.mintel.com) | [store@mintel.com](mailto:store@mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



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.

**BUY THIS REPORT NOW**

**€4400.00 | £3695.00 | \$4995.00\***

[store.mintel.com](https://store.mintel.com) | [store@intel.com](mailto:store@intel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**

# 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

# Nail Colour and Care – Canada – 2023

---

- 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

# Nail Colour and Care – Canada – 2023

---

- 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

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by Kantar Profiles ([See Research Methodology for more information](#)).

### Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

### Published by Mintel Group Ltd

[www.mintel.com](http://www.mintel.com)

email: [store@mintel.com](mailto:store@mintel.com)

### Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850