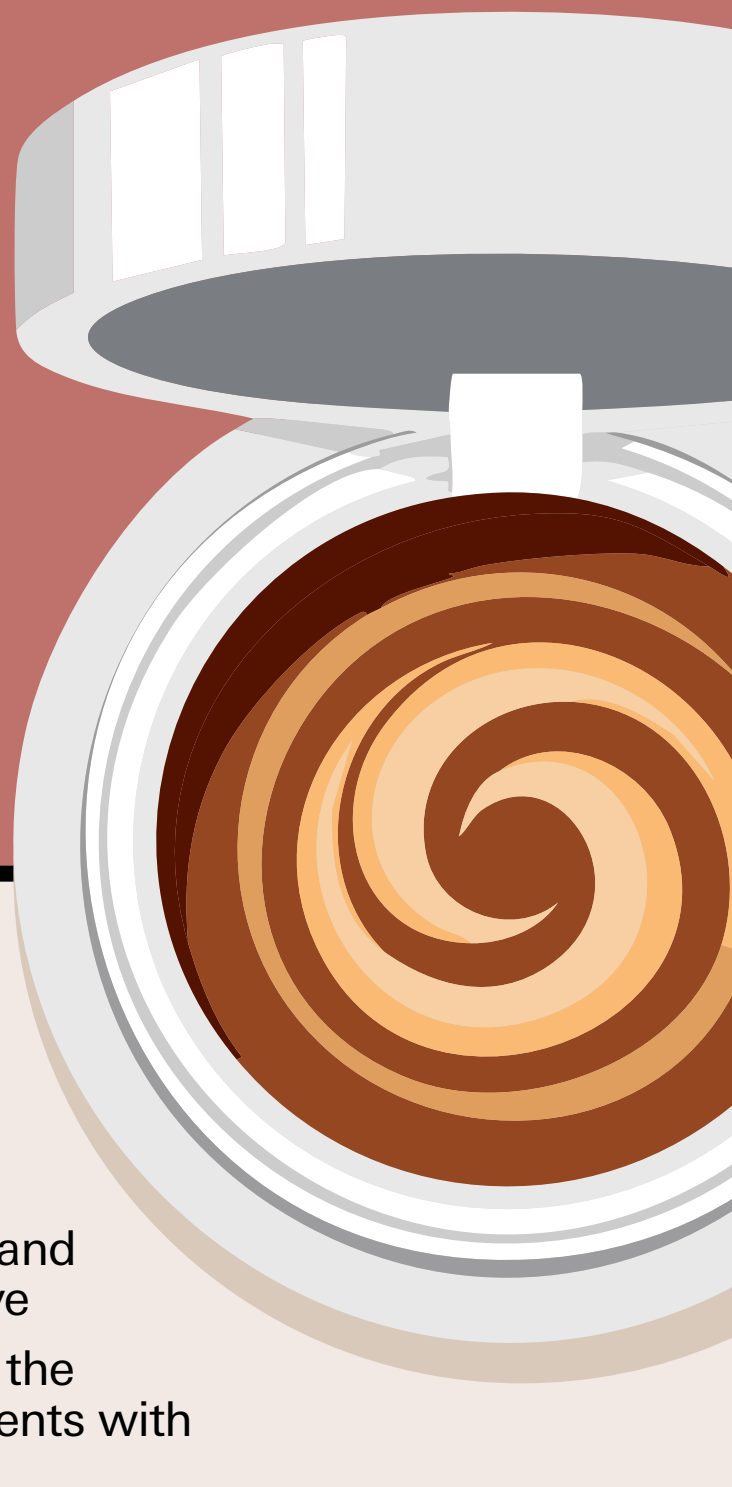


# SHADE (MIS)MATCH & INCLUSIVITY

How inclusive do consumers believe brands are when it comes to representing them through a diverse array of complexion shades and color offerings? If she can't find her perfect hue, does she ask for help in-store, mix shades, or just give up? And is it only the deeper tones with this difficulty, or does a percentage of every skin tone have a pet peeve when it comes to finding her true colors? In March 2026, The Benchmarking Company asked more than 4,300 US females their thoughts on this purchase dilemma, and what they'd like to see from your brand next.



## Inclusivity Matters

- **22%** agree that beauty brands are genuinely inclusive while **69%** state "some are, and some are not"
- **61%** of participants with darker skin tones and **39%** of participants overall state they have abandoned a specific brand because they felt the brand's shade line-up was not inclusive
- **25%** of all respondents feel that brands do not understand the needs of people with their skin tone while **48%** of respondents with darker skin tones (MST 6-10) feel brands miss the mark

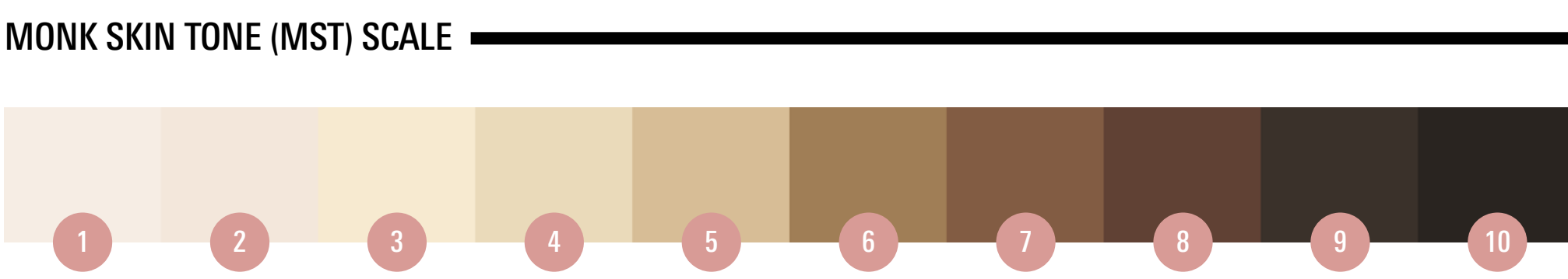
## Improving Inclusivity: Monk Scale or Fitzpatrick Scale?

Established in 1975, the Fitzpatrick scale categorizes skin tones from light to dark using a six-point scale to measure sensitivity to the sun. Representation of variation in darker skin tones is minimal. Recognizing the lack of inclusivity, Dr. Ellis Monk, in collaboration with Google, created the Monk Skin Tone (MST) scale featuring 10 shades, four of which are for lighter skin and 6 for darker skin tones.

### THE FITZPATRICK SCALE



### MONK SKIN TONE (MST) SCALE



## By Comparison

- **17%** self-identified their skin tone as a Fitzpatrick type 4, 5 or 6
- **25%** self-identified their skin tone as a Monk Skin Tone type 5, 6, 7, 8, 9 or 10



Ethnicity	Fitzpatrick Scale 4, 5 & 6 (17% of survey respondents)	Monk Scale 5-10 (25% of survey respondents)
African American/Black	39%	29%
Hispanic or Latin American	8%	13%
Asian	9%	11%
Mixed Ethnicity	10%	10%
Hawaiian or Pacific Islander or Alaskan Native and/or Native American	2%	2%
North African/Middle Eastern	0.4%	1%

## What Does an Inclusive Shade Range Mean?

- **78%** wide depth range from very light to very deep
- **59%** multiple undertone options
- **47%** balanced shade distribution between light/dark
- **47%** shade testing on real diverse skin tones
- **46%** inclusivity across all complexion categories/products



## Regardless of Skin Tone, Shade Match is a Point of Frustration When Buying These Products

- **41%** facial complexion products (**56%** MST 6-10)
- **38%** self-tanner
- **38%** body makeup (**44%** MST 6-10)
- **19%** lip color (**20%** MST 6-10)
- **10%** eye shadow (**14%** MST 6-10)

## COMPLEXION

## 9 out of 10 respondents use facial complexion products regularly

- **78%** liquid foundation
- **78%** concealer
- **59%** setting powder
- **56%** bronzer
- **52%** tinted moisturizer
- **47%** powder foundation



## On the Hunt! How She Finds Her Shade

- **66%** trial and error purchasing
- **59%** in-store shade matching
- **40%** online shade finder quiz
- **38%** I guess based on the description

Those with MST 6-7/MST 8-10 are **32%/16% more likely** to find her shade through in-store-shade matching than those with MST 1-3

## Great Expectations

She Expects 16-30+ Shades of Complexion Products

- **61%** MST 8-10 agree
- **62%** MST 6-7 agree
- **46%** MST 4-5 agree
- **51%** MST 1-3 agree



## Not Quite Right: Why Shade Matching Falls Short

- **66%** wrong undertone
- **52%** too light (all participants) /**62%** (MST 6-10)
- **51%** shade looks different in photos vs. real life
- **55%** too dark
- **34%** oxidizes after application (all participants)/**39%** (MST 6-10)
- **20%** limited options for my undertone (all participants) /**43%** (MST 6-10)

## Deeper Shades Mix More

Have mixed 2+ shades together to achieve their match:

- **61%** MST 1-3
- **69%** MST 4-5
- **79%** MST 6-7
- **72%** MST 8-10



## Changing Seasons Bring Shade Switches

- **80%** change her complexion shade seasonally
- **71%** buy another shade to manage seasonal change
- **53%** mix shades to match changing skin tone
- **47%** will use a bronzer/lightener

## Why She Mixes Shades

	All	MST 1-3	MST 4-5	MST 6-7	MST 8-10
<b>My skin tone changes seasonally (i.e. tan in the summer, paler in the winter)</b>	70%	66%	75%	71%	54%
<b>To customize coverage</b>	44%	45%	44%	42%	50%
<b>Undertone mismatch</b>	42%	41%	39%	53%	57%
<b>My perfect shade does not exist</b>	31%	29%	30%	39%	46%
<b>One shade is too flat</b>	23%	22%	23%	29%	28%

## Dark (MST 6-7) and Deep (MST 8-10) Buyers Believe...

- **71%** (MST 6-7)/**75%** (MST 8-10) Beauty brands offer too few deep shades overall
- **77%/67%** Deep shades jump too far apart to adequately match my skin tone
- **77%/83%** Complexion products for darker skin have limited undertone variety in deeper shades (often only red or neutral)
- **77%/78%** Brands often launch with many shades but very few deep options
- **69%/84%** There is often a lack of representation of people with my skin tone in beauty marketing
- **82%/86%** Shade names sometimes don't resonate with darker skin consumers, for example calling a beige concealer "nude"



## BRAND OPPORTUNITY

85% of complexion buyers in the MST 6-10 range agree that beauty brands should conduct product testing on women with darker skin

## Match-Intelligent Innovations She's Interested In

- **90%** would be likely to try a product that offers customized shade matching
- **60%** adaptive pigments that adjust to skin tones
- **58%** shade guarantees with easy exchanges
- **55%** brands offering custom-mixed foundation
- **54%** adaptive formulas that adjust to changes in skin tone, i.e. dry in the winter, oilier with hormone surges
- **46%** at-home shade scanning devices
- **40%** AI-driven undertone detection
- **26%** seasonal shade subscription programs

### Complexion Brands Doing the Best Job at Shade Range Inclusivity

- **30%** Fenty (overall participants) /**56%** (MST 6-10)
- **29%** MAC (overall participants) /**35%** (MST 6-10)
- **28%** Maybelline (overall participants) /**23%** (MST 6-10)

## Ready for Great Claims Like These in 2026? You Need Them!

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

"93% of users said the foundation provides a natural matte finish and matched her tone perfectly."

**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

"87% of women noticed a reduction in fine lines and wrinkles in 28 days."

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.