



AN INSIDE LOOK AT

GENDER EQUITY IN PROFESSIONAL BEAUTY



DRIVING MEANINGFUL
CHANGE AND EQUITY FOR ALL

March 2021



A MESSAGE FROM

ANNIE YOUNG-SCRIVNER, CHIEF EXECUTIVE OFFICER, WELLA COMPANY



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At Wella Company, our business is built on the foundation of women – our more than 500,000 customers across 100 countries worldwide, and our hair and nail beauty-loving customers and consumers everywhere.

While women dominate the professional beauty service industry in sheer numbers, they are still working towards equal pay and securing positions of decision-making. Moreover, due to the pandemic, women are losing their jobs or dropping out of the workforce in growing numbers due to caregiving responsibilities and pay inequality.

To understand the current context in major global markets including the United States and the United Kingdom, we conducted a meta-analysis of existing research, fielded a beauty professional survey to 600 beauty professionals and collected stories from women in the industry resulting in: An Inside Look at Gender Equity in Professional Beauty. By casting a light on this topic, our hope is that we can be a leader in choosing to challenge bias with the ultimate goal of driving meaningful impact for all.

Best Regards,
Annie

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THE PROFESSIONAL BEAUTY PARADOX

In the U.S., women hold about 89.6% of professional beauty service jobs, which places it in the top female-dominant industries along with elementary and secondary school teachers (76%) and home healthcare nurses (87.5%)¹.

Most Americans are more likely to believe that women make more money than men as beauty professionals. However, the reality of gender equity in the professional beauty industry tells a different story. By the numbers, women dominate professional beauty, yet men hold more leadership positions and make more money.

OF THE TOP SEVEN GLOBAL PROFESSIONAL BEAUTY COMPANIES, MALES HOLD MOST CEO ROLES WITH ONLY TWO FEMALE CEOS.

L'Oreal	Male
Paul Mitchell	Male
Pravana	Male
Estée Lauder Companies	Male
COTY	Female
Henkel	Male
Wella Company	Female

Wella Company is one of the only global beauty leaders that is led by a female CEO.

57% of Wella Company employees globally are female.²

45% of whom are director level or above.²

In just three months since the company was formed, on December 1, 2020,

70% of our new hires have been women.²

IN THE U.S. AND GLOBALLY, WORK REMAINS TO BE DONE:

PAY GAP PERCEPTIONS

59% OF U.S. WOMEN IN PROFESSIONAL BEAUTY BELIEVE THEIR MALE COUNTERPARTS MAKE MORE MONEY AS BEAUTY PROFESSIONALS.³

65% OF BEAUTY PROFESSIONALS FEEL EQUAL PAY IS LAGGING,⁴ GLOBALLY.

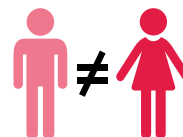
LEADERSHIP DISCREPANCIES

63% OF U.S. PROFESSIONALS BELIEVE HIGH-LEVEL, CORPORATE DECISION MAKERS IN THE BEAUTY INDUSTRY TO BE MALES.³

49% OF PROFESSIONALS SAY LEADERSHIP OPPORTUNITIES FOR FEMALE BEAUTY PROFESSIONALS ARE LAGGING,⁴ GLOBALLY.



Women who worked in personal care made 85 cents to the dollar men earned in 2019.⁵



There's also a huge gender discrepancy in editorial hairstyling, with women making only around 26% of the hair talent at major agencies for jobs like magazine covers and ad campaigns.⁶

FURTHERMORE,

...the pandemic has shaken up the industry, creating a financial burden that is resulting in salon closures and/or more beauty professionals borrowing money.

THE PANDEMIC HAS NEGATIVELY IMPACTED THE PROFESSIONAL BEAUTY INDUSTRY, PARTICULARLY WOMEN

The professional beauty community, which is part of the personal services small business economy, is one of the hardest hit by lockdown closures and the expense of health and safety measures. If past recession patterns repeat themselves, it will be small businesses that take longer to recover.

All global beauty professionals faced challenges⁴:



44%

of beauty professionals closed their salons during the pandemic.



3/10

borrowed money.



1/7

cut back on work to take care of their kids or family.

And, in the U.S., female beauty professionals shared some unique challenges³:

58%

cited pandemic restrictions are preventing women-owned beauty businesses from surviving.

29%

cited insufficient funding/financial support to become an independent stylist/nail tech or salon owner.

21%

feel that the culture of men holding high profile positions is standing in the way of success.

19%

cited inflexible work environment makes it harder to thrive at work and at home.

DESPITE THESE RECENT CHALLENGES, SALON OWNERS AND FREELANCE STYLISTS ARE REINVENTING THEIR BUSINESS MODELS:

“ Being faced with pandemic-mandated salon closures/ re-openings, keeping my staff employed and reinventing the salon experience to make it safe for hairdressers and clients, but also adapting to our clients' new needs, has been a rollercoaster ride. ”



DIANE STEVENS, SALON OWNER, NIOXIN TOP ARTIST

“ I really had to remain hopeful as many of us were forced to re-think our thought process and get proactive with our businesses. So many stylists I know are desperate for income and have resorted to finding income through temp jobs as food delivery drivers. ”



BRIANA CISNEROS, WELLA PROFESSIONALS NORTH AMERICA AMBASSADOR

DRIVING MEANINGFUL CHANGE AND EQUITY FOR ALL

We asked global beauty professionals how they want to see professional beauty companies help them and other stylists moving forward.⁴ Their response:

1. Access to free educational opportunities.
2. Administer grants to stylists in need.
3. Provide mentorship programs.
4. Provide mental support.
5. Using their platforms to promote work of up-and-coming stylists.

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My major commitment throughout this year is to be intentional, purposeful and inventive with my work, my family and the health of myself and everyone around me. It's an interesting time to be a working woman. There has been so much pain, but there is also beauty, as the very definition of beauty is being redefined. And I will never give up.



BRIANA CISNEROS, WELLA PROFESSIONALS
NORTH AMERICA AMBASSADOR

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Something I have really leaned into is using virtual experiences to continue prioritizing inspiration, education and mentorship for my stylist community.



SONYA DOVE, WELLA COMPANY PROFESSIONAL
TOP ARTIST & GLOBAL CREATIVE ARTIST

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Since the start of the pandemic, Wella Company has implemented support initiatives, including the following:

- ✓ Around the world, Wella has provided 100+ free education classes online and via Instagram during the pandemic.
- ✓ Our teams in North America have deployed a \$200,000 fund through Hairdressers at Heart to help cushion the burden that licensed professional hairstylists, nail techs, salon owners and educators have experienced through lost business, educational investment and more.

ABOUT THE RESEARCH

In February 2021, Wella Company conducted a meta-analysis of existing and original research, paired with expert commentary, to provide a deeper look at the current professional beauty landscape:

- **Data-Driven** > Conducted the “Women in Professional Beauty: Professionals’ Perspective” survey of about 600 beauty professionals, primarily in the US and UK, and fielded through the Wella Company social communities and conducted the “Women in Professional Beauty: Clients’ Perspective” a representative sample of 1,000 Americans fielded by Dynata research firm.
- **Expert-Credentialed** > Interviewed stylists and salon owners to better understand their perspective.

ABOUT THE WELLA COMPANY

Wella Company is one of the world’s leading beauty companies, comprised of a family of iconic brands such as Wella Professionals, Clairol, OPI, Nioxin and ghd. With 6,000 employees globally, presence in over 100 countries, Wella Company and its brands enable consumers to look, feel, and be their true selves. As innovators in the hair and nail industry, Wella Company empowers its people to delight consumers, inspire beauty professionals, engage communities, and deliver sustainable growth to its stakeholders. Further information about the Wella Company can be found here: www.wellacompany.com.

¹ Bureau of Labor Statistics, 2020

² Wella Company Gender Diversity Data

³ Women in Professional Beauty: Professionals’ Perspective of 249 U.S. respondents, February 2021

⁴ Women in Professional Beauty: Professionals’ Perspective of 600 global respondents, February 2021

⁵ NarrowtheGap.co, 2019

⁶ Forbes, 2019