

The background is a solid black field. In the top right corner, there is a large, curved red shape. In the bottom left corner, there are several overlapping shapes in shades of red and pink. In the bottom right corner, there are three horizontal white stripes of varying lengths, stacked vertically.

# The Racial Bias in Retail Study

Commissioned by  
**SEPHORA**

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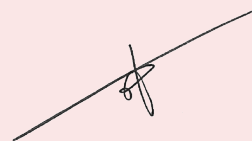
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# A Word From Jean-André Rougeot, President & CEO, Sephora Americas

At Sephora, diversity, inclusion and equity have been longstanding values and core to our mission since the company was founded as a new kind of beauty company. But the reality is that the retail experience is not always inclusive to all. The very real issue of underlying racial bias remains a barrier to ensuring that all of our clients enjoy the sense of belonging we strive to foster. We are committed to doing all we can to change that.

To better equip ourselves with the knowledge and insights needed to effectively tackle this issue, we commissioned the first of its kind research study on the state of racial bias in retail today. Not only has this effort helped to better measure the problem, but it has led to the identification of tangible opportunities for improvement for the retail community at large.

With these learnings in hand, we at Sephora have formulated an action plan to help us continue to address this issue ourselves. We hope other retailers will join us in charting similar paths forward, with the ultimate goal of fostering inclusion and improving the retail experience for all.



# Executive Summary

Retail is one of society's most interactive institutions — with millions of people from all different backgrounds crossing paths daily. These interactions bring a range of possibilities: highs and lows, positive and negative experiences, connection and misunderstanding, and often, instances of racial bias and the feeling of unfair treatment. In fact, racial bias is so pervasive in retail that according to a [2018 Gallup study](#) significantly more Black shoppers reported experiencing unfair treatment in a store within a 30-day period than at work, in dealings with the police, or at a restaurant, bar, theater, or some other entertainment venue.

The Sephora-commissioned study was conducted over a year-long period, beginning in the Fall of 2019 and ending in late 2020, included both primary and secondary research. The research consists of analysis of academic literature, a deep dive into why and how racial bias shows up in retail today, and interviews, both online and virtual, with shoppers and retail employees across the United States.

The study explores the disparate experiences in retail across race and includes insights on socio-economic status, gender, and more. The goal of the research is to call attention to the inequities of retail shopping experiences for consumers and more importantly, identify actionable solutions to galvanize change.

Racism, discrimination, and other forms of racial bias and unfair treatment are deeply rooted and pervasive issues in America. Recent events across the U.S. have further reinforced the need for immediate reform in all areas of the public sector. It has never been more apparent that a person's race in America determines profoundly different experiences, challenges, and outcomes.

The comprehensive research addresses the perspectives theorized by Sephora's academic partners, Dr. Cassi Pittman Claytor and Dr. David Crockett, leading scholars of retail racism: that racial bias and unfair treatment exists at all phases of the shopping journey, even before a shopper walks into a store. The study uncovered that:



**3 in 5** retail shoppers have experienced discriminatory treatment



**2 in 5** retail shoppers have personally experienced unfair treatment on the basis of their race or skin color



**3 in 5** retail employees have witnessed bias at their place of work

**The following pages will dig deeply into the 5 Truths about bias and BIPOC shoppers across the U.S. retail industry uncovered by the study:**

01

Limited racial diversity across marketing, merchandise, and retail employees results in exclusionary treatment before U.S. BIPOC shoppers even enter a store and continues across their in-store journey

02

U.S. BIPOC shoppers feel in-store interactions are driven by their skin color and ethnicity, yet retail employees cite behavioral attributes, rather than appearance, as the basis for their interactions

03

U.S. BIPOC shoppers use coping mechanisms to minimize or avoid anticipated biased experiences when in-store. While many customer experience needs are universal, BIPOC shoppers have some needs that hold greater importance in helping them feel welcome

04

The majority of U.S. BIPOC shoppers do not voice concerns about negative shopping experiences directly to retailers, creating missed opportunities for feedback and improvement, and impacting future sales as shoppers take their business elsewhere

05

Meaningful and long-term action is most important to U.S. shoppers and retail employees who want to see the company's words supported by consequential action

These findings offer retailers new and timely insights for how to create strategies and implement actions in their own businesses to confront, address and determine how best to reduce racial bias and unfair treatment. And while change will require a comprehensive commitment, the study points to several clear areas where shoppers, specifically BIPOC shoppers, and retail employees, believe they can be better served.



**To make the shopping experience more inclusive, it is critical that retailers develop strategies based on data – as Sephora has begun to do – and tailor them to the specific conditions of their business. That, for me, is the primary contribution of this study. It will help retailers better identify key areas of challenge and opportunity, and ultimately it will help them evaluate progress.**

– Dr. David Crockett (Sephora Research Advisor)

# Racial Bias in Retail

**What is racial bias? Racial bias is an unconscious or conscious (implicit vs explicit) way of thinking that influences how an individual acts and interacts with people from different racial or ethnic backgrounds. Racial bias is complex.<sup>1</sup>**

Pittman Claytor and Crockett created a model that accounts for racial bias, revealing the ways that racial bias is pervasive. Racial bias is pervasive across retail settings and impacts all shoppers, granting some preferential treatment and others exclusionary treatment. They argue that **racially-biased and exclusionary treatment (RBET) affects the shopper journey in two distinct ways:**<sup>2</sup>

**01** An invisible “tax” or experience burden for select demographics in which retail shoppers:



Are unable to find products they need, have fewer options to choose from, or products are segregated or difficult to access.



Have difficulty getting assistance, experience long wait times, or are treated differently.

**02** A pattern of exclusion and inequality via policies that create unequal experiences across demographics in which retail shoppers:

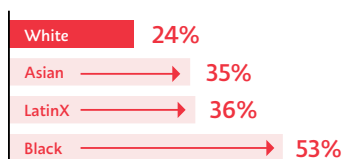


Are categorized as less desirable than others. For example, Black shoppers being treated as suspicious and subject to additional surveillance while in store.



Are treated as unworthy or illegitimate and ultimately prevented from entering a store or making a purchase because of stereotypes. For example, a Black shopper reporting they were told they “could not afford an expensive item.”

**Sephora’s study found that a majority of U.S. shoppers report personal experience with bias and unfair treatment:**



**2 in 5** retail shoppers have personally experienced unfair treatment on the basis of their race or skin color

BIPOC shoppers have personally experienced higher rates of unfair treatment on the basis of their race or skin color

# Racial Bias in Retail

Experiences with racially-biased and exclusionary treatment create an added burden or cost to the shopper. For example, in instances of RBET, shoppers have a humiliating, degrading, or emotionally-taxing experience. Select shoppers have to manage interactions with security or police because they report being perceived by store associates “as a threat.” This all contributes to the store being a place where they may feel unwelcome.<sup>1</sup>



**While Americans tend to believe in the power of the purse and that money is the great equalizer, a multitude of studies have consistently revealed that racial minorities, particularly Black Americans, are not protected from stigmatizing and discriminatory treatment in retail settings. In perpetuating racially exclusionary treatment, retail stores contribute to the promotion and reproduction of racial hierarchies.**

– Dr. Cassi Pittman Claytor (Sephora Research Advisor)

A critical new finding discovered in Sephora’s study was that shoppers are not the only ones subject to bias across the retail landscape. Retail employees’ experiences with bias in their store can be extremely varied as they are both accused of bias, and for those of color, victims of bias from shoppers and other retail employees.



**1 in 5** retail employees have personally experienced unfair treatment at their place of work (20%)



**1 in 3** retail employees have contemplated quitting when they experienced racial bias and unfair treatment (31% for all employees; 37% for Black employees)

# Truth 1

Limited racial diversity across marketing, merchandise, and retail employees results in exclusionary treatment before U.S. BIPOC shoppers even enter a store and continues across their in-store journey

Sephora's study found that retail shoppers confront exclusionary treatment even before stepping foot in the store. **Three in four retail shoppers (74%)** feel that marketing fails to showcase a diverse range of skin tones, body types and hair textures. This is true across all categories, but especially for **department stores (72%), beauty (70%), apparel (69%), and mass merchants (67%)**.

The lack of diversity in marketing is also seen in the merchandise that lines retailer shelves. **Two in three retail shoppers (65%)** think stores fail to deliver an equally-distributed assortment of products catering to different shoppers' tastes and preferences. This is particularly true for **mass merchants (63%), hardware (62%), beauty (60%), and outdoor/recreation (60%)**.

The issue isn't only that current on-shelf items don't serve diverse shopper needs. In addition, nearly **four in five retail shoppers (78%)** don't believe there is representation in brands or companies that are owned by and made for people of color.



## Retailer Opportunity

- ◆ Focus on representation and diversity across marketing and product that addresses the unique needs of all racial groups as these are some of the biggest visual cues for shoppers that signal diversity and inclusion
- ◆ Focus on representation and diversity in staff to signal diversity and inclusion to shoppers and create inclusive shopping experience through sustained learning of inclusive behaviors with shoppers
- ◆ Make a commitment to long-term store placements of BIPOC-made products and carry merchandise that caters to diverse shopper needs equally
- ◆ Implementing equitable and consistent product placement in stores, avoiding products for people of color being isolated or hard to find, locked up behind glass, or generally less accessible than other products



# Truth 2

## U.S. BIPOC shoppers feel in-store interactions are driven by their skin color and ethnicity, yet retail employees are more likely to cite behavioral attributes, rather than appearance, as the basis for their interactions

When researchers asked retail shoppers of all races about unfair treatment, they indicated that they experience feeling judged on the shopping journey, specifically upon entering the store. BIPOC shoppers are more likely than their white counterparts to feel most often judged by their skin color and ethnicity. For example, **Black shoppers are 3x more likely** than white shoppers to feel this way (**32% vs. 9%**). White shoppers, on the other hand, are more likely than Black shoppers to cite more race-neutral factors like **age (27% vs. 12%)** or **attractiveness (13% vs. 7%)**, as the basis of the discernment they face.

### U.S. shoppers feel most judged by:

	#1	#2	#3
Black Shoppers	★ Skin Color	★ Ethnicity	Age
LatinX Shoppers	Body weight or size	Age	★ Ethnicity
Asian Shoppers	★ Ethnicity	Age	Attractiveness
White Shoppers	Age	Attractiveness	Clothes/Accessories/Makeup

### When BIPOC shoppers are in U.S. retail stores, they report feeling:

**Judged** when they feel others are assessing them based on the color of their skin or their race

**“Passed off”** when they’re directed to someone who looks like them, to help find a shade

**Misunderstood** when employees misidentify their race or identity

**Overlooked** when employees ignore them

**Defensive** when they feel others are studying their behavior, following them or may accuse them of something

### Employees perceive their interactions with U.S. shoppers differently

Yet, despite the experiences retail shoppers report, **three in five (60%)** retail employees surveyed more often cite shoppers’ behavioral attributes rather than physical attributes when determining how to approach or interact with shoppers, underscoring significant disconnect between how shoppers and employees interpret interactions in U.S. retail.

# Truth 2

However, U.S. shoppers confront the reality of racial bias and unfair treatment in their inability to receive help from store associates who are “like them.” For example:



**4 in 5** retail shoppers struggle to find associates who look like them (79%)



**4 in 5** retail shoppers have difficulty finding associates who are familiar with their unique needs (82%)



**2 in 3** retail shoppers are not able to find store associates who speak their native language (63%)

In sharing their retail experiences, Black shoppers, in particular, report an interest in connecting with store associates who truly understand them. Black shoppers are **1.5x more likely** than white shoppers to say it's important that stores have associates who look like them (**35% vs 20%**).

**In order to have a more positive in-store experience, BIPOC shoppers believe it is important that:**



They can find a store associate familiar with needs **unique to them and their race/ethnicity**



Store associates communicate with them in **their native or preferred language**



## Retailer Opportunity

- ◆ Implement employee trainings specific to unconscious bias, racial profiling and anti-racism
- ◆ Focus on representation and diversity across the workforce so that shoppers have the opportunity to find and connect with store associates who look like them
- ◆ Remove policies and practices that disparage shoppers, such as using code words to classify Black shoppers or using seemingly race-neutral or colorblind logic to guide interactions with shoppers who have unique needs
- ◆ Train all employees in understanding and addressing the specific needs of all racial groups, so that BIPOC employees are not burdened with the responsibility of servicing all BIPOC shoppers in the store

# Truth 3

U.S. BIPOC shoppers use coping mechanisms to minimize or avoid anticipated biased experiences when in-store. While many customer experience needs are universal, BIPOC shoppers have some needs that hold greater importance in helping them feel welcome

Unfair treatment most often occurs while retail shoppers are browsing. In fact, among retail shoppers who have experienced mistreatment in-store, they're **3x more likely** to say it happened while they were browsing than at checkout (**38% vs. 12%**).

Based on the unfair treatment faced when browsing, many retail shoppers, specifically BIPOC, have adopted coping mechanisms — both preventive and reactive — to help minimize feeling underserved, ignored, watched or followed. For example, insights from conversations with retail shoppers revealed that they may do one or more of the following:



**Shop online** to avoid the interaction altogether, thereby removing the burden of unfair treatment



**Dress nicely**, such as bringing designer handbags to avoid assumptions they can't afford to shop there or will steal



**Don't try samples**, and may even leave purses and bags at home to prevent accusations of theft



**Make a "shopping plan"** to ensure their time in store is efficient with minimal employee interactions



**Adjust their body language**, such as keeping their hands out of their pockets or avoiding browsing altogether



**Interact with employees** to make it known they are interested in spending money

When surveyed, retail shoppers who report having been treated unfairly have strong preferences for priority actions that retailers can take to create a more positive in-store experience. Some needs are universal across all retail shoppers, as roughly 7 in 10 said it was important that:

Store associates are friendly (**72%**)

Store associates offer assistance when they have a question or need help (**69%**)

Store associates make it easy for them to return or exchange items (**70%**)

However, some needs hold greater importance to BIPOC shoppers vs. white shoppers:

They do not have to wait a long time to get service (**64% vs. 59%**)

Store associates tell them about new products, special offers, or services (**33% vs. 25%**)

Being greeted within a reasonable time after entering the store (**31% vs. 26%**)

Have store associates that look like them including race and or age (**25% vs. 20%**)



## Retailer Opportunity

- ◆ Create a universal welcome system that is sensitive to the needs of all shoppers and makes the store feel like a welcome place upon entry
- ◆ Create neutral signals for type of help needed between shoppers and employees, such as different color shopping baskets to indicate those who would like assistance and those who would not
- ◆ Improve the shopper experience upon entry and while browsing, decreasing wait times for service, and creating scripts for interactions to ensure that all shoppers are made aware of new products and promotions

# Truth 4

The majority of U.S. BIPOC shoppers do not voice concerns about negative shopping experiences directly to retailers, creating missed opportunities for feedback and improvement, and impacting future sales as shoppers take their business elsewhere

The study's findings indicate that when retail shoppers experience bias, most avoid conflict and stress in the moment. As such, only **three in ten (30%)** retail shoppers reacted actively to unfair treatment as a means of providing feedback to the retailer, like publishing an online review or posting on social media detailing their experience. Fewer than **one in five (15%)** of them raised the issue with a manager or store supervisor. And despite the fact that **twice as many** BIPOC shoppers than white shoppers say they've been treated unfairly in stores due to their ethnicity (**30% vs 15%**), BIPOC shoppers are less likely than white shoppers to report that they spoke up about their experience to a manager or store supervisor (**13% vs 27%**).

Unfortunately, the majority — **70%** — of retail shoppers when confronted with an unfair treatment respond in a way that never addresses the feedback directly with the retailer. And among retail shoppers who have used their voice when they found themselves in a situation where they were mistreated, a majority (**61%**) were unsatisfied with the retailer's response.

## These situations can have permanent consequences for both U.S. retailers and shoppers.



**3 in 5** BIPOC shoppers are unlikely to visit that specific location again (57%)



**2 in 5** BIPOC shoppers are unlikely to visit to any store location (43%)



### Retailer Opportunity

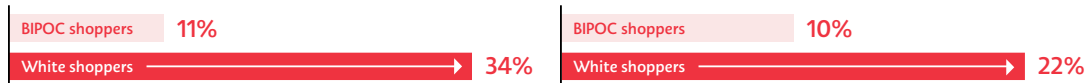
- ◆ Create an accurate and accountable tracking system for negative shopping experiences for shoppers with an opportunity for employee inputs
- ◆ Create a plan that allows for follow-up with shoppers who did not make a purchase to better dimensionalize the areas for improvement, like customer service and product selection and availability
- ◆ Cultivate an 'exit experience' instead of only the greeting upon entrance to ensure that shoppers have an opportunity to discuss their experience in the moment
- ◆ Provide quick and easy ways for shoppers to provide feedback in real time

# Truth 5

## Meaningful and long-term action is most important to U.S. shoppers and retail employees who want to see the company's words supported by consequential action

While retail shoppers appreciate retailers' stances in prioritizing issues related to addressing and preventing racial bias and unfair treatment in their stores, they seek action, not only words. They expect retailers to show their commitment to change through new programs, training, and tools designed to address these pervasive issues. For example, **one in two (49%)** retail shoppers say they only want to see diversity in marketing if the retailer is genuinely committed to serving diverse shoppers.

For many retail shoppers, however, the stark reality is that their own experience with unfair treatment has not yielded any significant change on the part of the retailer. In fact, while BIPOC shoppers experience incidents of racial bias and unfair treatment more often than white shoppers, they are:



**3x** less likely than white shoppers to say the retailer addressed the unfair treatment they experienced with a change in store policy

**2x** less likely than white shoppers to report that the retailer responded to the unfair treatment they experienced by conducting an employee training

Retail employees also want to see the company's words supported by meaningful action. A majority (**81%**) of retail employees recognize the importance of being able to service diverse shopper needs, with fewer than **one in three (27%)** feeling confident they can meet them extremely well. Additionally:



**1 in 2** retail employees feel their stores fail to help shoppers find a sales associate familiar with their race and unique needs (51%).



**More than a third** of retail employees feel their store lacks the proper training to help them serve shoppers of different races (35%).



And **3 in 10** retail employees don't feel their store successfully performs on recommending the right product that best suits a shoppers' specific needs (29%).

**Three in five (59%)** retail employees want training on how to better service a diverse set of shopper needs, and, even fewer have received DEI training (**53%**) or unconscious bias training (**40%**). **Three in five (61%)** retail employees who receive Diversity and Inclusion or Unconscious Bias Trainings believe such formal trainings are very, if not extremely, successful in reducing unfair treatment in their store.



### Retailer Opportunity

- ◆ Build substantial and publicly shared client service programs, training and policies that showcase the retailer's commitment to DEI through change
- ◆ Develop universal appeasement strategies for shopping experiences that include racial bias and/or exclusionary treatment to reinforce commitment to equality by the retailer
- ◆ Institute employee conduct policies that ensure accountability and appropriate action when circumstances arise

# Sephora Racial Bias in Retail Action Plan

Both the findings and the opportunities identified in this study reveal the work that needs to be done to tackle bias within the broader retail industry. Using these opportunities as a guide, Sephora designed a preliminary action plan tailored to how racial bias manifests in our stores specifically, with the goal of eliminating bias completely. These actions represent the next step in our continuous commitment to create an in-store and online environment that is inclusive for all.



## Marketing & Merchandising

- ◆ Establish new marketing production guidelines that encourage consideration of a diverse array of backgrounds, identities, ages and body types in our campaigns, social media, marketing and more
- ◆ Building on our commitment to the 15% Pledge, we will double our assortment of Black-owned brands by the end of 2021
- ◆ Evolve the 2021 Accelerate brand incubator program to focus exclusively on cultivating and growing BIPOC-owned brands
- ◆ Prominently feature and advertise our Black-owned brands through a dedicated tab on our website, which we have already begun to do
- ◆ Continue cultivating one of the industry's most diverse influencer groups through our Sephora Squad



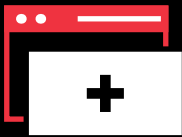
## The In-Store Experience and Operations

- ◆ Created new training modules required for all Beauty Advisors that better define what client engagement should look like at each point in the shopping experience and what behaviors will not be tolerated
- ◆ Procedural and operational changes to delineate recovery responsibilities to our Loss Prevention specialists, allowing Beauty Advisors to focus solely on client service
- ◆ Implement new feedback mechanisms for both purchasers and non-purchasers.
- ◆ Establishing a D&I In-Store Experience Dashboard that will provide analytics on client service and feedback to stores on a monthly basis to measure employee training compliance and efficacy
- ◆ Reduce the presence of third-party security vendors in stores and utilize more in-house Loss Prevention specialists, with the goal of providing better client care and minimizing shopper concerns regarding store policing
- ◆ Roll out a new greeting system across all stores to ensure a more consistent experience for all store visitors upon entry



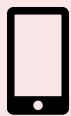
## Talent and Inclusive Workplaces

- ◆ Broaden our recruitment and career advancement processes for employees of color by providing new resource toolkits for hiring managers, expanding our existing partnerships with associations dedicated to advancement and identifying key markets for recruiting events to increase representation
- ◆ Evolve our employee performance reviews to include a new inclusivity-based performance metric, ensuring all team members have our D&I goals as part of their internal impact to our business
- ◆ Update our zero-tolerance behavior standards to include automatic and immediate termination if there is reason to believe an employee violated Sephora's code of conduct. Zero tolerance behaviors include profiling, discrimination, harassment and retaliation, among others
- ◆ Commit to expanding our outreach to attract more candidates for Sephora's 2021 intern class from underrepresented communities
- ◆ Building on our Pull Up For Change commitment, we will share our progress on representation within our organization bi-annually on Sephora.com
- ◆ Continue to increase the frequency and depth of our employee trainings, adding new modules that offer strategies to identify bias and exhibit inclusive behaviors in the workplace. We will also require 100% compliance across our existing employee base
- ◆ Ensure 100% participation with foundational Unconscious Bias training for all new hires



**To hold ourselves accountable, we will be announcing our progress bi-annually with our community via a new D&I dedicated section of our website.**

Our hope is that other retailers across the industry will use the findings and opportunities presented in this study to inform meaningful actions, based on how bias uniquely shows up in their own retail settings. Together, we can meaningfully work toward eliminating racial bias from the retail industry at large.



To join the movement, retailers can reach out to [sephoraIN@sephora.com](mailto:sephoraIN@sephora.com)

# About the Research

The Racial Bias in Retail Report encompasses findings from a research initiative commissioned by Sephora and conducted by Kelton Global and LRW, both Material Companies, in partnership with academic partners [Dr. Cassi Pittman Claytor](#), [Dr. David Crockett](#), [Whitney Dunlap Fowler](#), and [Dr. Patricia Raspberry](#).

- ◆ A thorough review of academic literature to understand the policies and practices that bring unfair treatment to life in retail settings
  - In partnership with Dr. Cassi Pittman Claytor and Dr. David Crockett
- ◆ A cultural insights scan to provide a contextual analysis to inform why racial bias shows up
  - In partnership with Whitney Dunlap Fowler
- ◆ Qualitative research, which included:
  - An Online SmartCommunity with **32 participants spanning gender and ethnicity**
  - Digital ethnographies with a diverse group of **26 female shoppers**
  - **14 employee** interviews from Sephora and other retailers
- ◆ An online survey among **3,034 U.S. shoppers and 1,703 retail employees** from across the U.S. retail industry – from mass merchandising to department stores to speciality retailers

The quantitative survey was conducted online in June 2020. The shopper study has a margin of error of +/- 1.7%, and the employee study has a margin of error of +/- 2.4%.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results.

In this particular study, the chances are **95 in 100 that a survey result does not vary**, plus or minus, by more than **1.7 percent among shoppers and 2.4% among employees** from the result that would be obtained if interviews had been conducted with all personas in the universe represented by the sample. The margin of error for any subgroups will be slightly higher.



# SEPHORA

## ABOUT SEPHORA AMERICAS

Since its debut in North America over 20 years ago, Sephora has been a leader in prestige omni-retail with the purpose of creating an inviting beauty shopping experience and inspiring fearlessness in our community. With the goal of delivering unbiased shopping support and a personalized experience, Sephora invites clients to touch and try 25,000 products from 400 carefully curated brands, enjoy services at the Beauty Studio and engage with expertly trained beauty advisors in more than 500 stores across the Americas, as well as over 600 locations inside JCPenney. Clients can also experience Sephora online and through our mobile app, access the free-to-join Beauty Insider program and digital community, which together enhance the experience of Sephora's passionate clients. Sephora has been an industry-leading champion of diversity, inclusivity, and empowerment, guided by our longstanding company values. In 2019, Sephora announced a new tagline and manifesto, "We Belong to Something Beautiful," to reinforce its dedication to fostering belonging amongst all clients and employees and to publicly strive for a more inclusive vision for retail in the Americas. Sephora continues to give back to our communities and advance inclusion in our industry through our Sephora Stands social impact programs.

For more information, visit: <https://www.sephora.com/about-us> and @Sephora on social media.

For media inquiries, please visit our [Sephora newsroom](#) or email [pr@sephora.com](mailto:pr@sephora.com)

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