



# Emerging Consumer Trends 2021: Self-Care Enthusiasts and Empowered Activists



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# Emerging consumer trends and insights

The pandemic has changed the ways we work, shop, play, learn and communicate. Consumer behaviors have evolved and reflect new attitudes, values, and ultimately, new shopping expectations and patterns.

As digital adoption and acceleration have blended work and life, people are finding new ways to care for themselves and their families, and support causes they care about, because they have a heightened sense of what's important.

Leveraging Microsoft's first-party data and digging extensively into consumer research, we've identified two new growing consumer personas: the **Self-Care Enthusiast** and the **Empowered Activist**.

- The **Self-Care Enthusiast** is a shopper that is interested in spending time where it matters most whether that be with family, on mental health or in fitness. They seek brands that enhance their physical and mental well-being.
- The **Empowered Activist** is the consumer who votes with their wallet, by purchasing from brands that align with their own values. They seek brands that are eco-friendly, inclusive, ethical and small-business oriented.

We are sharing these new consumer trends and insights to provide a deeper understanding of changing motivations and shopping behaviors across industries and categories, and to help you grow your business.

We understand that reaching an audience of people who are ready to engage and transact is important. That's why Microsoft Advertising connects you with people at the right moments across work and life.

# Consumer behaviors have evolved reflecting new attitudes, values, and ultimately shopping patterns.

For our analysis, we benchmarked actions against the “Everyday Shopper” which we’ve defined as consumers in-market for the same product type but not searching on the same values.



## Self-care Enthusiast

This shopper is interested in spending time where it matters most whether that be with family, on mental health, or in fitness. They seek brands that enhance their physical and mental well-being.



## Empowered Activist

This consumer votes with their wallet, by purchasing from brands that align with their own values. They seek brands that are eco-friendly, inclusive, ethical, and small business oriented.



## Everyday Shopper

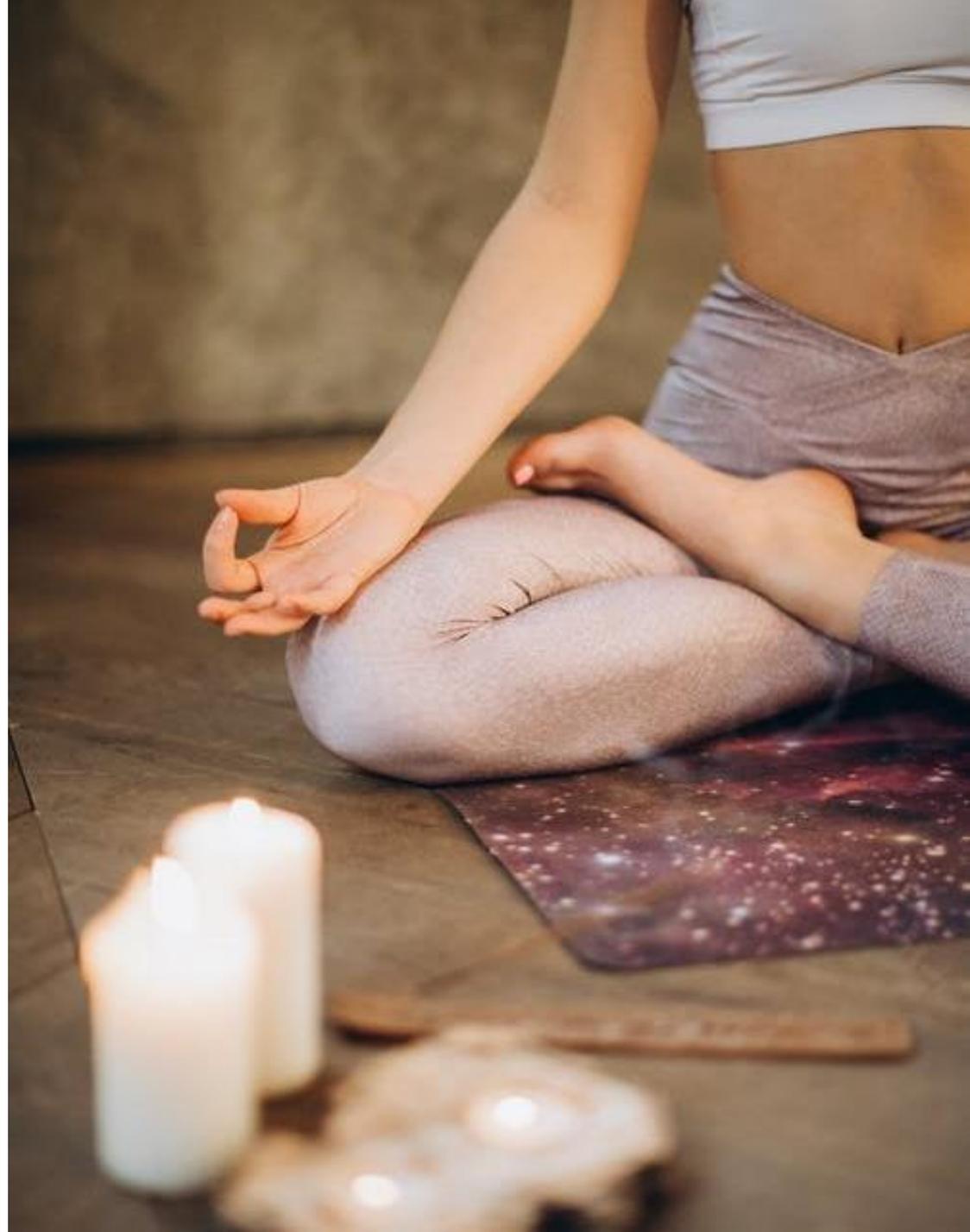
For our analysis, we will benchmark against the *everyday shopper* which are consumers in-market for the same product types but not searching on the same values.

# Self Care Enthusiast

**Values self, family, time, health and wellbeing**

This consumer is interested in spending time where it matters most whether that be with family, on mental health, or in fitness. They seek brands that enhance their physical and mental well-being.

They are working hard. Their time is stretched throughout the day, and time management is top of mind. This is also an active audience that prioritizes leisure and hobbies over all else. They focus on connections, entertainment, and are knowledge seekers. Self-care enthusiasts are consistently multitasking between work, school, life, and leisure activities.



## What's impacting their behaviors?

According to a recent study published by the American Psychology Association (APA), **2 in 3** American adults (**67%**) say they have experienced increased stress over the course of the pandemic<sup>1</sup>.

We have also witnessed social and political unrest, challenges with education, financial pressures, and the environment. With so much converging at once, it's understandable that most people are feeling stretched and overwhelmed.

With this in mind, we wanted to investigate our consumer search trends and evaluate audience signals to determine if they are feeling stressed. And if so, does this correlate to an uptick in healthier habits.

<sup>1</sup>. [Stress in America 2020: A National Mental Health Crisis, page 5](#) - APA; Harris Poll (Stress in America Survey)



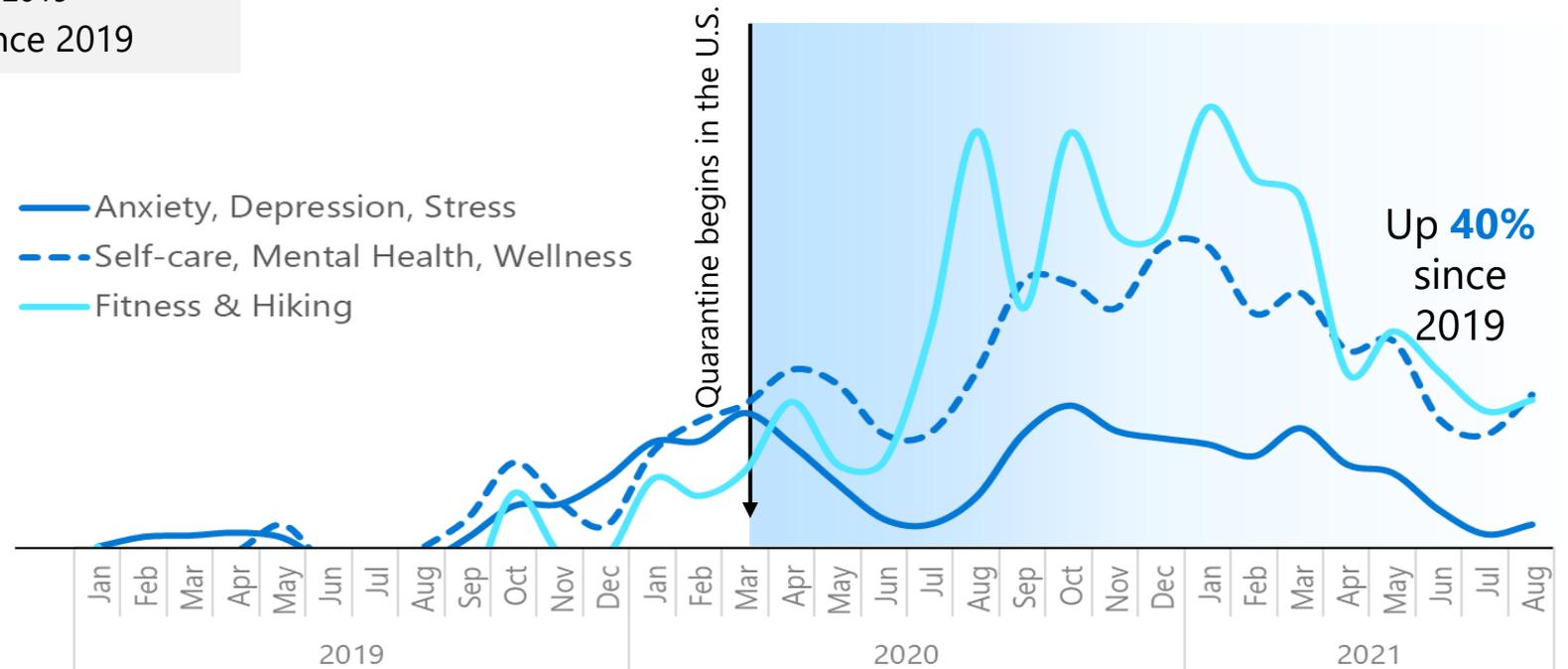
# Mental Health and Fitness related searches in the U.S. on the rise with Self-Care Enthusiasts

## Searches related to:

- Anxiety, Depression and Stress **↑32%**
- Self-care, Mental Health and Wellness **↑97%**
  - These categories combined **↑40%** since 2019
- Fitness, Hiking and Workouts **↑146%** since 2019

People are adapting their lifestyles to prioritize their health and focus on healthier habits.<sup>1</sup>

Beyond focusing on their health, self-care enthusiasts are consistently multitasking between work, school, life, and leisure activities.<sup>2</sup>



1. [Post-Pandemic Consumer Behavior Is Crystallizing. What Does That Mean For CPG Brands? \(forbes.com\)](#)  
2. 1. Source: Microsoft Internal Consumer Data | January 2021 – June 2021 | US only | Microsoft Consumer Decision Journey analysis on Selfcare Enthusiasts. Online Only. PC Only.

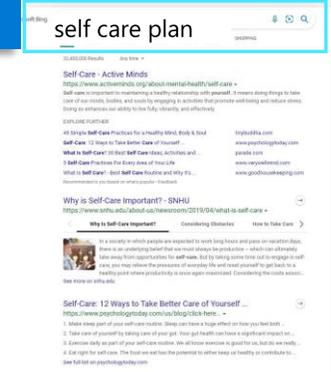
Source: Microsoft Internal Data | Jan 2019 – August 2021 | US only | Microsoft O&O and Syndication Searches | Searches Indexed to Jan-March averages.

# Self-Care Enthusiasts seamlessly switch between work and life during a day

The sequencing of the activities are not in a particular order, but represent how the self-care enthusiast shifts back and forth as part of their journey

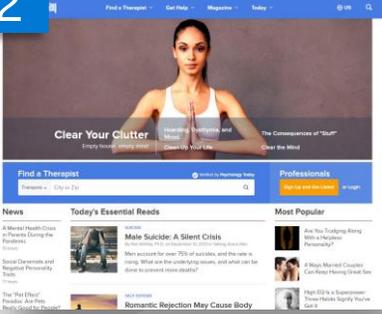


1 self care plan



Search for self-care topics

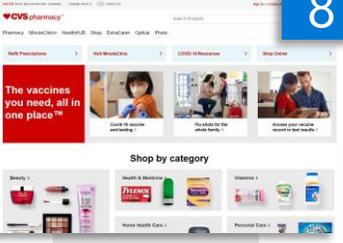
2 Look for a therapist



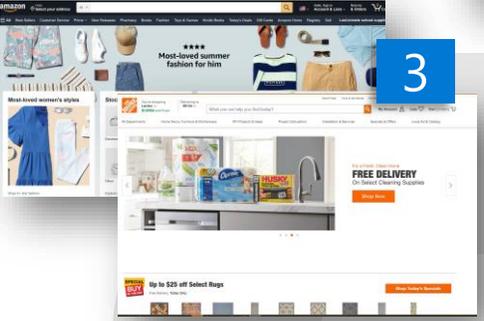
7 Check out a K-12 school sites



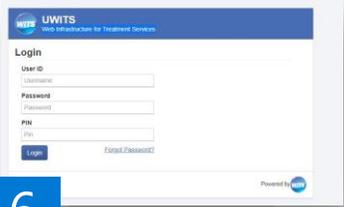
8 Shop at a pharmacy



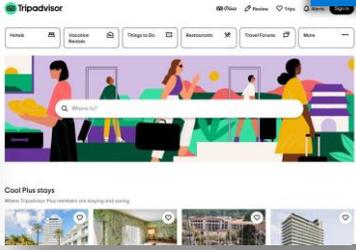
3 Shop online retail stores



6 Log on a health care portal



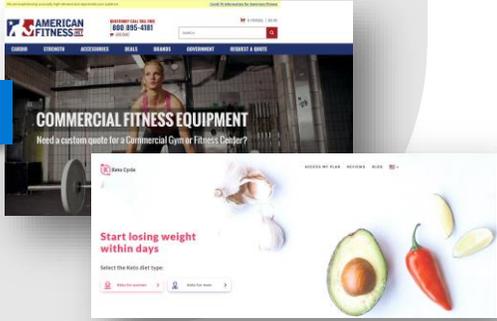
9 Book travel or vacation



4 Check emails; attend conference calls



5 Visit a diet & fitness site



# Consumers focused on mental health are likely to be college students, educators, parents and healthcare workers



**+5x**

Visited a medical school site

**+8x**

Logged onto a university portal



**+6x**

Researched healthcare productivity software

**+17x**

Visited a K-12 school website



This audience is working hard. Their time is stretched throughout the day, and time management is top of mind.

Make research and purchase decisions convenient for them.

Highlight the time management benefits and convenience you're able to offer in your products or services.

# Consumers focused on diet and fitness likely to be pet owners, spiritual, parents, educators, sports & gaming enthusiasts, and avid readers



**+8x**

Shopped for pets or visited pet stores

**+4x**

Research spirituality

**+4x**

Visit a university domain



**+6x**

Play video games

**+5x**

Looking for their next book

**+3x**

Looking for advice & information



This is an active audience that prioritizes leisure and hobbies over all else. They focus on connections, entertainment, and are knowledge seekers.

This audience is seeking information, guidance and breaks from their daily tasks.

Consider messaging this audience in a way that creates a deeper connection, builds trust, provides information, and entertains.

# Compared to the everyday shopper, self-care enthusiasts are highly engaged in leisure and shopping activities and are in-market to shop

## Mental Health Enthusiast



+3x  
Shopping for Home & Garden



+3x  
Shopping online mass merchants



+3x  
Looking for a hotel or vacation rental



+3x  
Looking for real estate

## Diet & Fitness Enthusiast



+4x  
Shopping for Apparel & Home and Garden



+4x  
Looking for a loan



+4x  
Car Shopping



+3x  
Looking for a hotel or vacation

Layer on **relevant in-market audiences** for search campaigns to reach selfcare users during their cross-shopping decision journeys.



Knowing they are multi-taskers, ensure you are consistently top of mind during the length of their journey.

There are  
**94 million Self-Care Enthusiasts**  
in the US on the  
Microsoft Advertising Network



# Microsoft Advertising has a valuable Self-Care Enthusiast audience



**59%**

Are under the age of 45

**56%**

Have a college degree

**43%**

Make \$85K+ annually



**20%**

More likely to use a search engine for brand discovery

**30%**

More likely to have purchased make-up online in the last month



**52%**

Take a domestic vacation at least once every 6 months

**30%**

More likely to be planning to purchase home exercise equipment

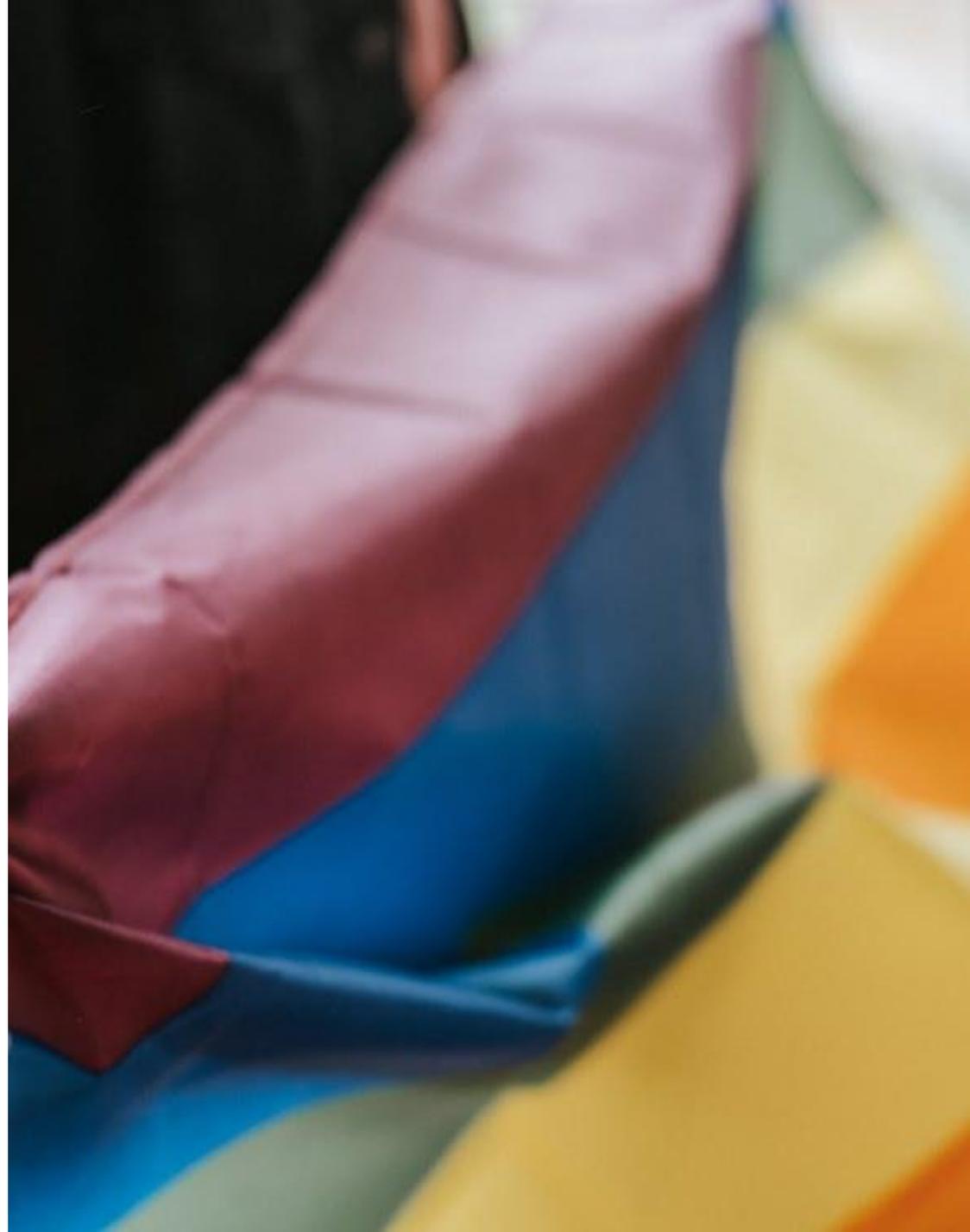
# How to reach the Self-Care Enthusiasts

- Time management is top of mind for the self-care enthusiast, consider **highlighting the time management benefits** and conveniences you're able to offer **in your products or services**.
- Make it personal. Self-care enthusiasts are putting themselves & their loved-ones first. Show them you care by promoting products and **messaging that enhances their lives and creates connection**.
- Not all self-care enthusiasts are the same. We see unique behaviors the further we dive into their personas. **Leverage in-market audiences** in your Search and Audience campaigns to ensure you're engaging this audience in the right way, at the right time.

# The Empowered Activist

Consumers who vote with wallets

This consumer votes with their wallet by purchasing from brands that align with their own values. They seek brands that are eco-friendly, inclusive, ethical, and small business oriented.



# Who is the “Empowered Activist”?

The empowered activist is a consumer who “believes they have the power to affect change”. According to [Euromonitor's 2020 study](#), they make up 12% of the world’s population. 87% of them feel it is important to participate in cultures other than their own and 94% value real world experiences.

They are customers who prioritize authenticity and are often concerned with global issues. They carefully consider their actions and purchase behaviors to ensure they are in line with their values. Empowered Activist Shoppers’ purchase decisions are increasingly driven by a brand’s values.

- **80%** of Americans have made purchase decisions based on their values in the past year.<sup>1</sup>
- **33%** of survey respondents stopped using a brand based on its social actions.<sup>2</sup>
- **38%** of Americans are boycotting at least one company for lack of diversity.<sup>3</sup>

Source:

1. [Why consumers value CPG brands that practice sustainability | Ad Age](#)
2. [Retail speaks: Seven imperatives for the industry | McKinsey](#)
3. [Future Consumer 2023 White Paper — Page 12 \(createtomorrowwgsn.com\)](#)



Highly prioritizes authenticity and concerned with global issues.

Carefully considers their actions and behaviors to ensure they are in line with their values.

Value products with messaging that aligns with their beliefs.



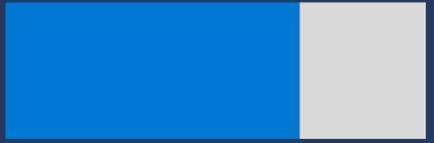
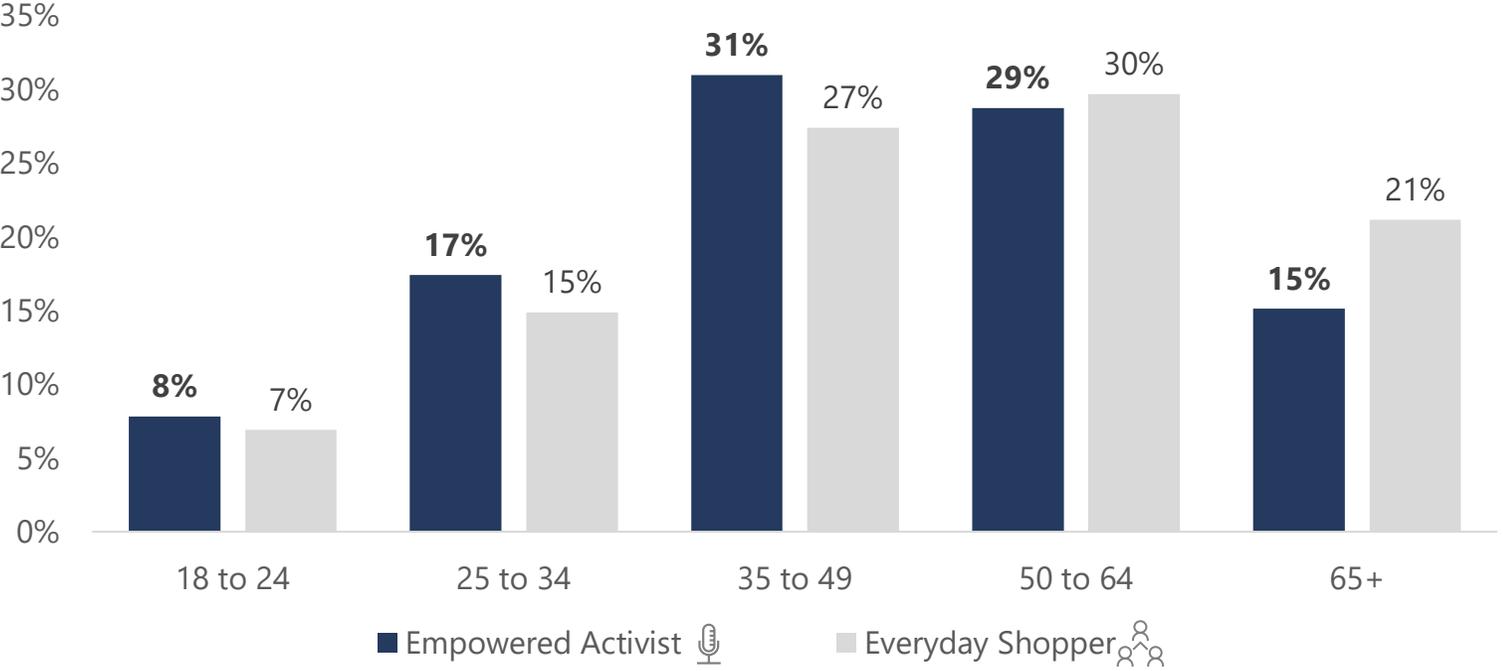
## The Empowered Beauty Activist

To understand this audience further, we decided to do an industry deep dive into the beauty sector. The beauty industry is one that is ahead of the curve in terms of actively labeling their products as cruelty-free, environmentally friendly and minority owned. These messages are front and center on the packaging and in their advertisements. This is an example of an industry that is already successfully targeting the empowered activist and can shed light on the similar benefits other advertisers and verticals can tap into.

# The Empowered Beauty Activist is a younger consumer that can drive a greater lifetime value.

48% of these shoppers on the Microsoft Network are ages 25-49.

% of Beauty Shoppers | By Age



■ 65+ ■ Under 65



In contrast, the everyday beauty shopper over-indexes by 40% in the 65+ age group.

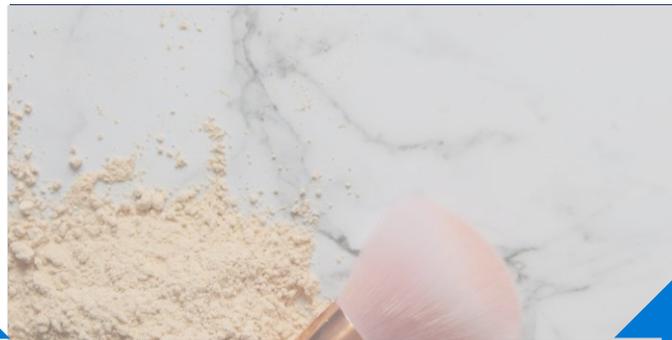
Source: Microsoft Internal U.S Data | Apr – Jun 2021.

# Empowered Beauty Activists show more purchase intent signals than their counterparts, as illustrated by in-market audience participation

Use Microsoft's 1<sup>st</sup> Party data on In-Market Audiences to help find the right audience



Over-index in Skincare Products by  
**+42%**



Over-index in Makeup and Cosmetics by  
**+29%**



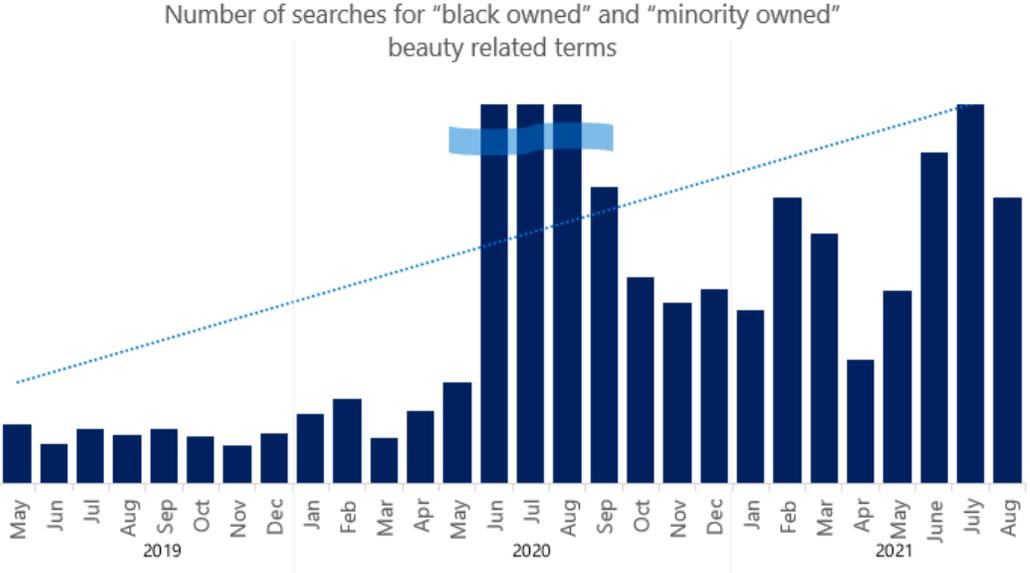
Over-index in Bath & Body Products by  
**+20%**

# Beauty searches increase YoY for terms related to social causes

**141%** YoY increase in beauty searches for black-owned and minority-owned related terms.

- **7000% increase in searches in June 2020 compared to June 2019**

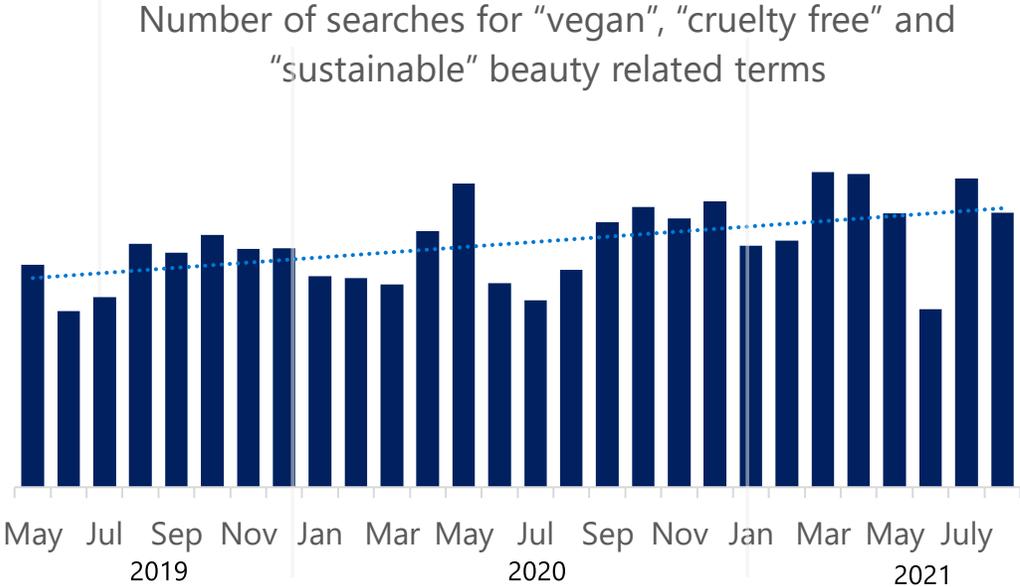
The sharp increase in June 2020 coincides with the Black Lives Matter movement.



**18%** YoY increase in beauty searches for vegan, cruelty free and sustainable related terms.

- **"Vegan" related search terms had highest growth rate of 70% YoY**

These trends highlight how these attributes are becoming more important for our shoppers.



Source: Microsoft Internal U.S. Data | May 2019 – August 2021  
May – Dec YoY figures.



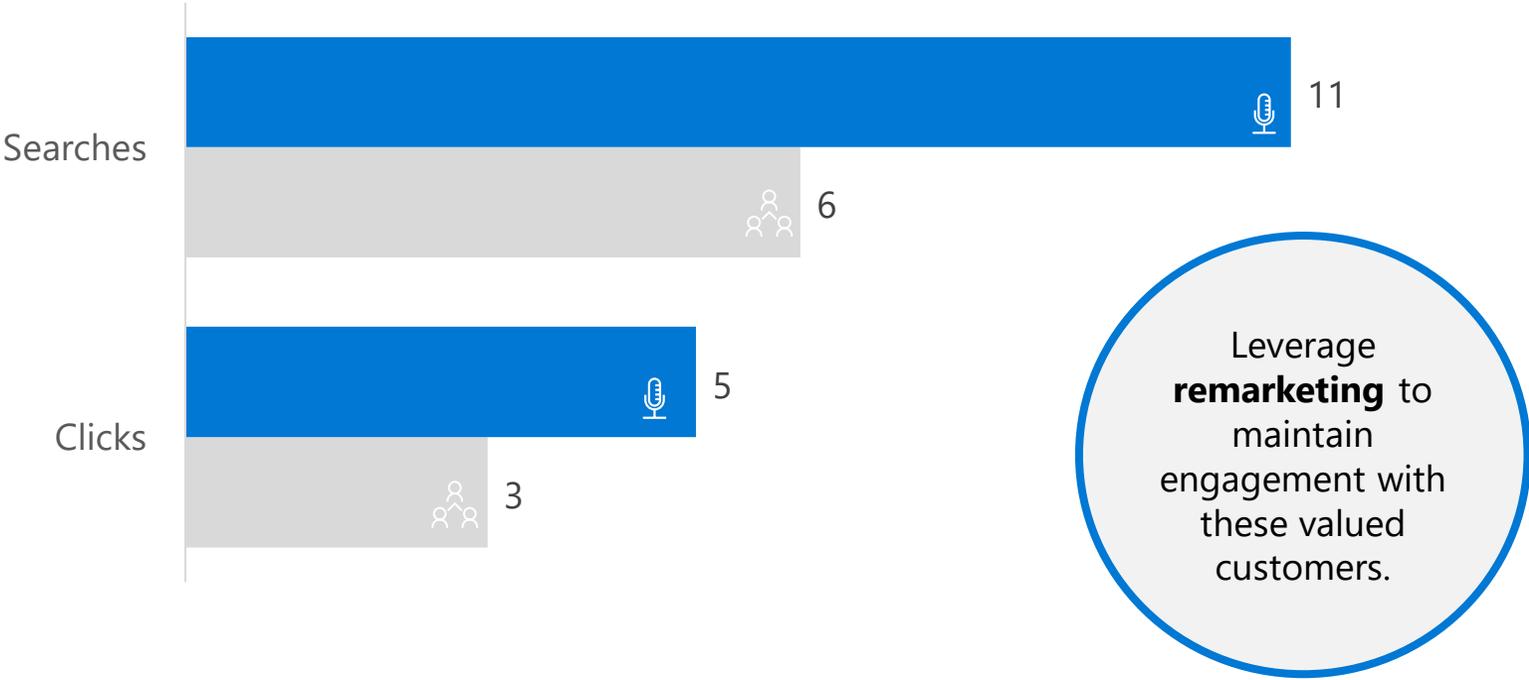
# Connecting with Empowered Beauty Activists helps brands find their industry aficionados.

## Empowered shoppers have 80% longer search journeys

It's not only that Empowered Beauty Activists have a lower funnel journey, but they also have a longer search path with more clicks. These are consumers who are more engaged with beauty products than the everyday shopper and are likely super-users or industry aficionados.

Average by Beauty Shopper

■ Empowered Activist   ■ Everyday Shopper

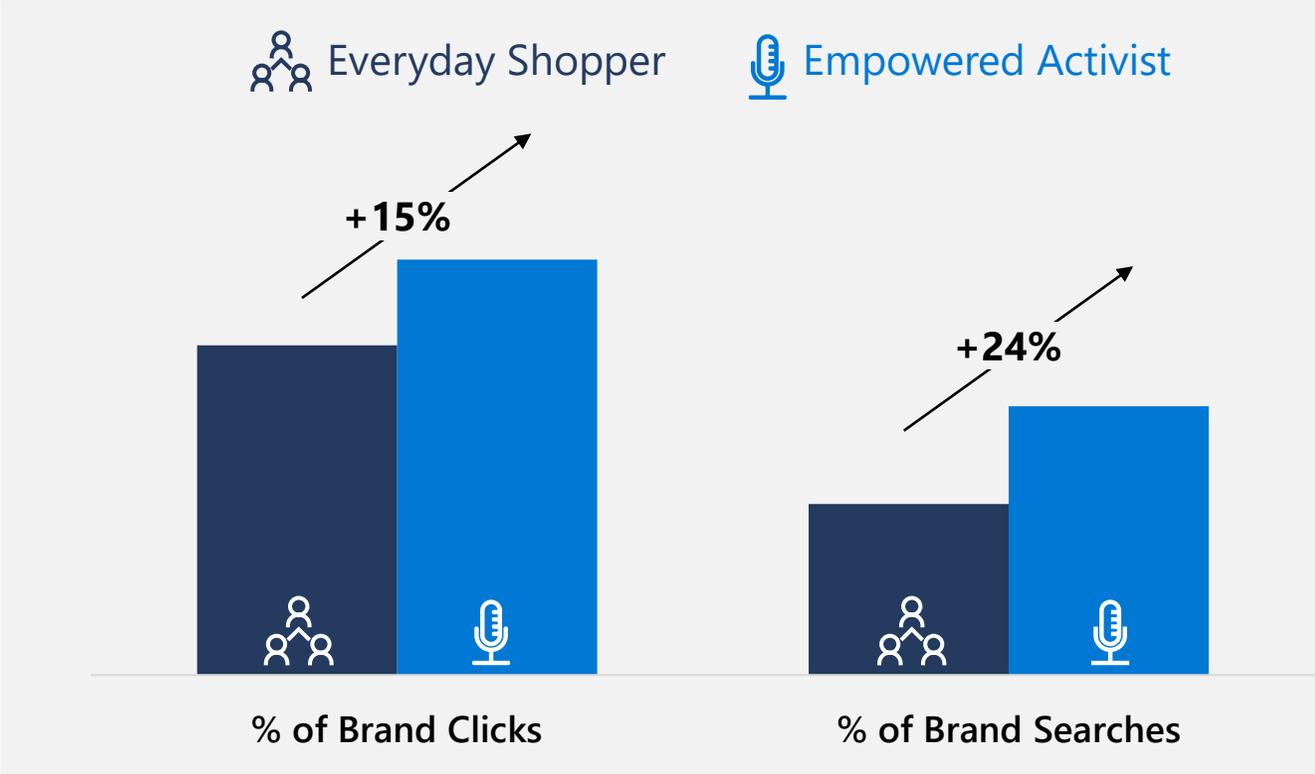


We can see the empowered activist has on average 11 searches and 5 clicks in their journey represented by the blue bars, versus 6 searches and 3 clicks for the everyday beauty consumer.

Source: Microsoft Internal U.S Data | Apr – Jun 2021.



# Compared to the Everyday Beauty shopper, Empowered Beauty Activists have a lower funnel journey

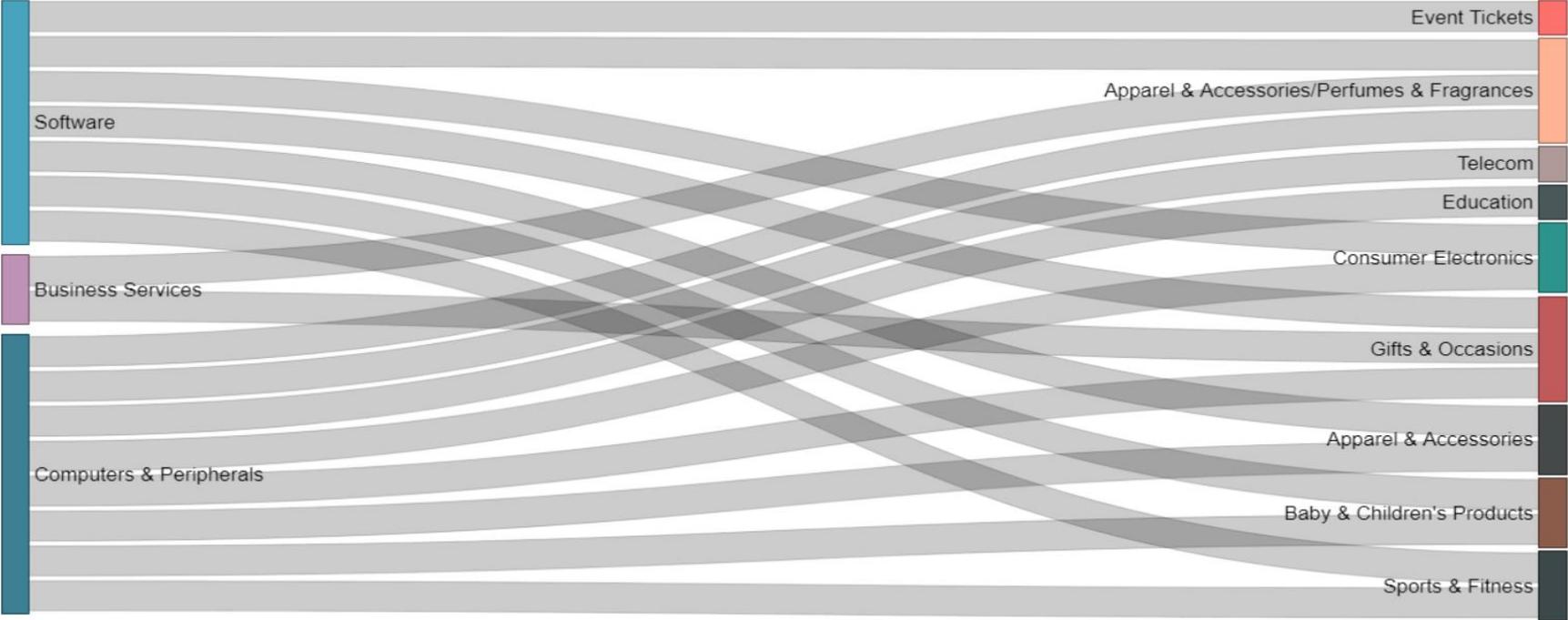


The empowered beauty shopper is **15%** more likely to click on brand and **24%** more likely to search for brand than the everyday shopper.

Include **sustainable ad messaging** to reach these shoppers on the Microsoft Network.

Source: Microsoft Internal U.S Data | Apr – Jun 2021.

# Today's beauty shoppers are in-market across personal and business needs



When we look at the left side of this visual, we can see that those in-market for software are also in-market for event tickets, fragrances, telecom and education. Likewise, those in market for business services are also shopping for gifts and special occasions. This trend of shifting between work and life needs, is one we've seen across audiences just as we saw with the self-care enthusiast. So, it's not only that consumer values have evolved but also how and when they shop is evolving as well.

Source: Microsoft Internal U.S Data | Apr – Jun 2021 | Shopper behavior based on in-market audience participation by empowered beauty activists across industry categories.



There are  
**84 Million Empowered Activists**  
in the US on the  
Microsoft Advertising Network



# Microsoft Advertising has a valuable Empowered Activist audience



**58%**

Are under the age of 45

**56%**

Have a college degree

**42%**

Make \$85K+ annually



**23%**

More likely to use a search engine for brand discovery

**35%**

More likely to consider sustainability when making a personal care



**50%**

Take a domestic vacation at least once every 6 months

**35%**

More likely to have purchased an experience (day spa, day outing, etc.) online

# How to reach the Empowered Activist

- Call out your product's ethical and/or green features directly in your **branded ad title**.
- Expand your consumer reach by serving on **non-brand keywords that reflect these values** (e.g., fair label apparel, minority-owned cosmetics).
- Leverage the **inclusive attribute ad copy annotation** to highlight if your business is carbon neutral, minority owned, wheel-chair accessible, etc.
- Watch the [Marketing with a Purpose Microsoft](#) training for marketing actions to help you build a trusted brand.



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# Microsoft Advertising reaching 1 billion+ globally



**600M**

Devices with Edge installed<sup>1</sup>



**719M**

Unique searchers<sup>2</sup>

**16BN**

Global monthly searches<sup>2</sup>

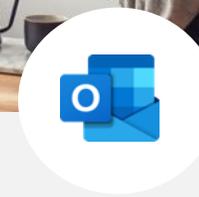
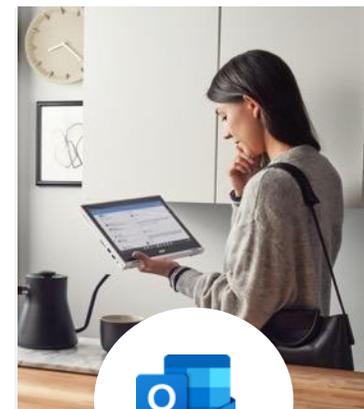


**484M**

Monthly unique visitors<sup>2</sup>

**20B**

Monthly page views



**108M**

Monthly unique visitors<sup>2</sup>

**44M**

Outlook active U.S. users<sup>2</sup>



**69M**

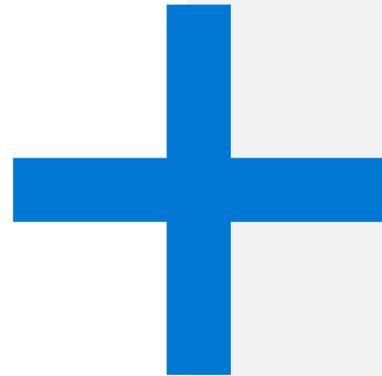
Xbox live monthly unique users<sup>2</sup>

**100 Hours**

Average time spent on Xbox per month<sup>1</sup>

# Two networks, one powerful result

Microsoft  
Search  
Network



Microsoft  
Audience  
Network



# Combine search and native to **maximize performance** across the customer decision journey

Users exposed to a brand's ad in both search AND native are:

**2.6x** more likely to visit the brand's site

**3.5x** more likely to convert

Data represents U.S. only.



# Microsoft Search Network



140 million  
unique monthly searchers



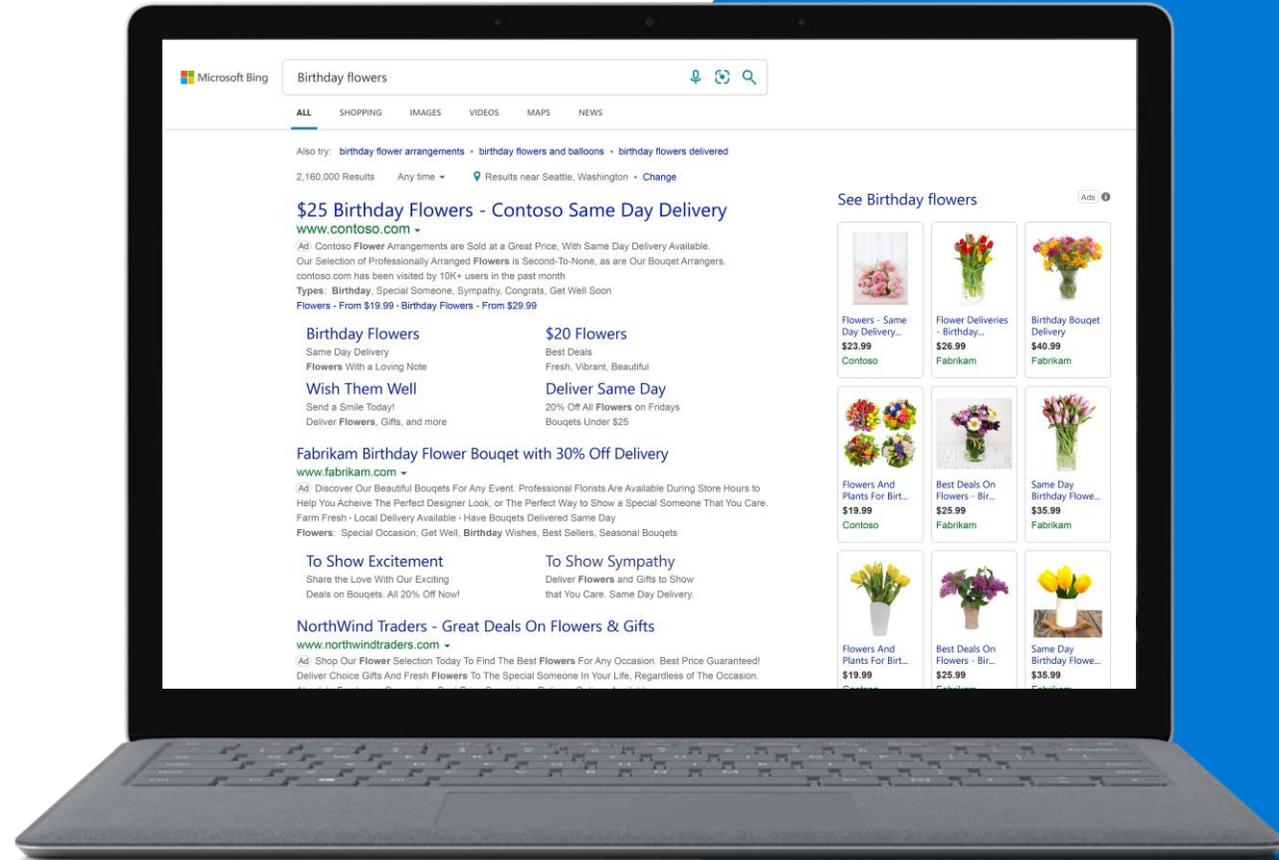
8.5 billion  
monthly searches



37%  
PC market share in the U.S.



47%  
share of searches on  
Windows devices



# Microsoft Audience Network



253 million  
unique monthly users<sup>1</sup>



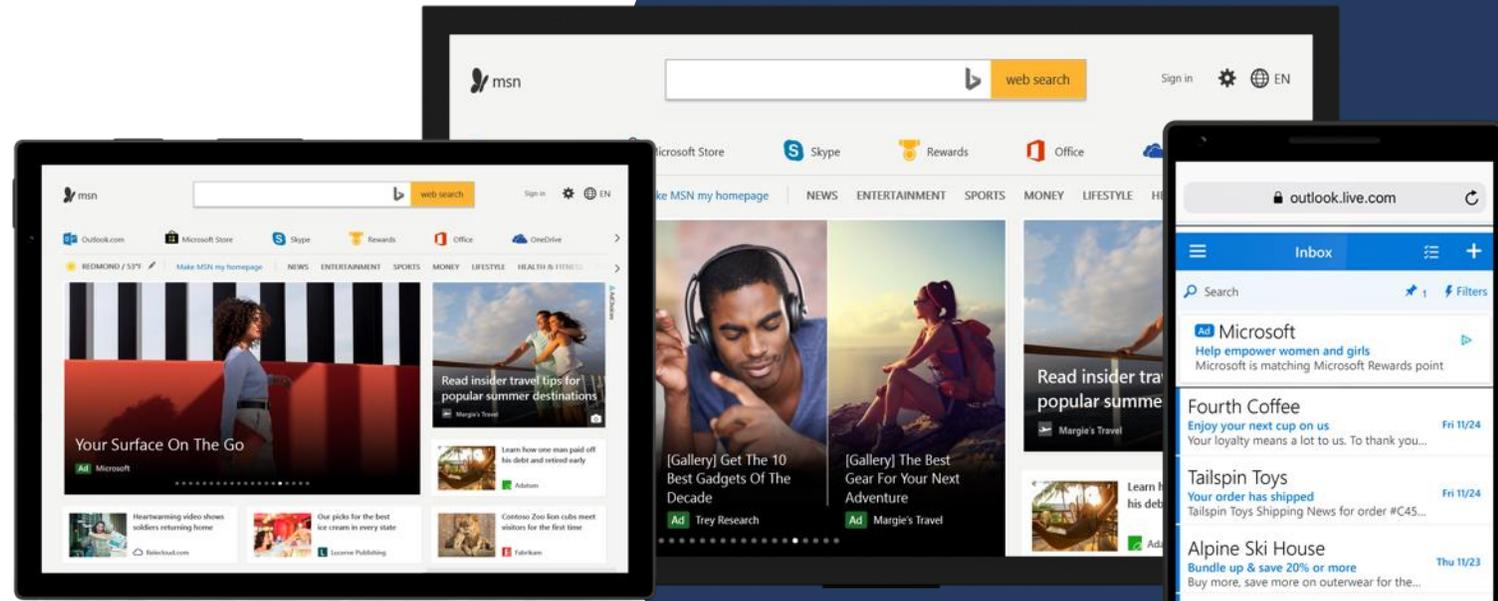
Premium native placements



Brand-safe experiences



Highly contextual ad  
placements



Source: 1.comScore Microsoft Audience Platform Report, May 2021. Numbers are rounded to the nearest percentage point.

# Consumers are evolving their behavior, make sure your business is evolving with them.

1

**Connect with people as they shift between work and life tasks.**

The rising consumer types show how audiences mix work and life. Microsoft can help you be there in the moments that matter.

2

**Your brand at its best.**

Microsoft has an uncompromising respect for brand safety and privacy. Advertise on the network that reflects the Empowered Activist's values.

3

**Connect with people ready to engage and transact.**

Self-care enthusiasts are ready to buy. The Microsoft audience has a higher purchasing power and spends more online.

4

**Tap into rich audience intelligence.**

Microsoft Advertising provides rich first-party data to help you identify, reach and deliver more personalized experiences to these new audiences.

## Stay informed

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EDITOR'S PICK

March 9, 2021



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Companies like Tommy Hilfiger are leading the fashion industry to think more inclusively about the people they serve. It's helping them innovate in surprising ways.

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