Foresight on Demand (FoD) Impact of the COVID-19 pandemic on European Consumer Behaviour - Foresight Study

Executive Summary

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Executive Summary

This foresight study's purpose was to anticipate future challenges for consumer policy in the context of the twin transition and the short- and long-termed impacts of the COVID-19 pandemic on consumer behaviour, consumption patterns and markets in Europe with a time horizon of 2025 to 2030.

In order to find answers to the complex questions of uncertain future developments the foresight team combined several approaches of foresight for anticipatory governance. This includes a systematic horizon scanning of existing reports for weak signals of change in all fields of society such as societal developments, technology, economy, environment, policy and values. The literature and data based information collection was combined with explorative exercises like a scenario development, a visioning process and a gap analysis to develop new ideas for policy options. The engagement of stakeholders and experts on consumer policy was crucial throughout the whole process, in particular for the analysis of influencing factors, alternative scenarios and suggestions for policy actions.

With its anticipatory and exploratory nature, the study was a pilot project for the implementation of comprehensive strategic foresight in DG JUST. Accordingly, the project was also used to build capacity for foresight in dealing with future uncertainty. Representatives of several departments of the DG actively participated in the workshops in all four steps of the process and thus got to know and tested the methods of foresight. These include participatory and qualitative foresight methods such as horizon scanning and scoping for identifying key future trends, scenario and vision development for exploring different possible futures and identifying challenges, and roadmapping approaches for developing options for action. Another important element of the study was the intensive involvement of stakeholders in all steps of the process, especially in the development and discussion of future scenarios and in the development of new policy ideas.

The DG can use the various results of the Foresight process for the further future-proof implementation of the New Consumer Agenda. The **trends** examined for the scenarios can be reviewed at regular intervals with regard to new developments and impacts on consumption and consumer protection. The **scenarios** provide an overview of possible futures of consumption in Europe after the COVID-19 pandemic and serve for exploring the scope of possible developments. The **visions** for consumer protection and empowerment, especially of vulnerable groups and consumers with special needs, summarise stakeholders' expectations for consumer policy in the next 10 years. The **action fields** prioritised together with stakeholders for consumer policy in and after the pandemic and the **ideas for policy actions** can now be used by the EC to set its own priorities and develop ideas into concrete actions. The EC may not want to take up all the ideas presented here, but the suggestions can provide guidance on which issues are of high importance from a stakeholder perspective in the COVID-19 crisis.

Trends and drivers for consumption after the pandemic

The horizon scanning's trend analyses have revealed how European citizen's lives are impacted by the pandemic in many ways. Key areas of activities such as work and study, travel and mobility, entertainment, health, food and physical activities were examined and 29 trends in relation to the COVID-19 pandemic impacts on consumption were identified. Eleven key trends with yet unclear effects were used to develop the four scenarios.

One of the most important impacts of the still ongoing COVID-19 pandemic on consumer behaviour is the massive increase in online activities and shopping – from groceries to clothes, sports equipment and bicycles to streaming music and movies and related shifts in activity patterns such as mobility, tourism or remote work from home. Therefore, it is not surprising that most of the policy ideas proposed have to do with online activities in one way or another. The opportunities and risks of online activities for consumers are already in focus of the EC consumer policy, but the dimensions of the risks have greatly expanded because of the pandemic. Consumer protection must therefore focus even more on online shopping and other online activities in the future in order to identify and reduce the risks in the virtual and real world of shopping and consumption at an early stage. The risks relate to people's vulnerability, especially in terms of physical and mental health, income and social participation, as well as privacy, data protection and freedom of choice in consumption.

Scenarios for the future of consumption after the pandemic

The risks for consumers resulting from increased online activities because of the pandemic are in tension with the trends and drivers of the two major transformations of society: digitalisation and the sustainability transition. The twin transition continues and will do so in the upcoming 10 years, despite the COVID-19 pandemic, which is affecting Europe longer than expected at the beginning. Moreover, the transition is being greatly accelerated by the pandemic as people and organisations make use of digital tools and platforms to continue their activities despite the lockdowns. Consequently, the goal of making digitalisation sustainable in Europe remains important and must be pursued even more strongly in view of the acceleration of online activities.

Another important effect of the pandemic is that many people have become more aware of the connection between consumption and environmental pollution and climate change. They have experienced the effects of less traffic on air quality and wild life in public parks or the increase of packaging waste due to food delivery and online shopping. In this context, the trend analysis has shown that two emerging types of consumers related to the twin transition will continue to shape the future of consumption:

> ➢ The *responsible consumer* who limits consumption for the sake of the environment, and
> ➢ The "*tech optimist*" consumer who does not want to limit consumption despite the environmental impact and instead relies on (digital) technical solutions.

How strong their respective influence on future consumption will be cannot be determined at present. The scenarios show different variants of this and how consumption as a whole will change as a result.

It is important to note that the scenarios are not forecasts. The qualitative exploration of futures with scenarios strive to account for possibilities that might not be possible to model, but can be approached through rigorous imagination. Therefore, the study used a scenario development process specifically designed to facilitate the identification of future challenges and opportunities across various scenarios and thus helps make consumer policy decisions more future-proof.

The four scenarios developed in the study outline four different development paths for consumer behaviour in the EU. None of them is a simple continuation of current developments; instead, the shock of the pandemic is taken into account. There are relevant changes compared to today, each of which is the result of the interaction of individual key influencing factors.

Scenario "United for a more sustainable, inclusive and resilient society"

This scenario is characterised by setting the securing of a fair income to support people in critical situations and fighting poverty as top priority across the EU Member States. In order to speed up the sustainable energy transition, taxes, incentives and grants are widely accepted in 2030. Diverse policies to protect private data are in place. The positive development of the markets after the pandemic is accompanied by a recovery of the labour market. Remote work is common in well-paid, knowledge-intensive jobs. After the experiences of social isolation and distancing during the lockdowns, today in 2030, social cohesion is high; being not only digitally but also socially connected is very important. Young people are drivers for the shift of values towards inclusion and empowerment. For many consumers, status symbols are sustainable products and practices.

In this scenario, the COVID-19 pandemic has strengthened social solidarity across Europe in the long term by making many people aware of their own vulnerability and of the fact that crises can only be resolved in cooperation within society and between societies. In 2030, these ideas have led to the reduction of wide disparities in income levels across the EU, as the support for initiatives tackling inequalities in access to digital services, education/reskilling, and health care at Member State level reached soaring levels. As many activities have remained online even after the COVID-19 pandemic, the up-take of online activities in the early 2020s was a real "wake-up call" for digital consumer rights protection and sustainable consumption in the digital society. The combination of industrial investments into the digital transformation, changes in consumer behaviour and how vulnerable groups were affected by the crisis made all the difference.

Scenario "Inequalities and green growth"

In 2030, the economic inequalities are exacerbated and unemployment rates among the EU Member States are constantly high. In consequence, poverty has increased. Affordable housing is a major issue, not only in cities and metropolitan areas. Due to the bad economic situation, political tensions between European Member States are growing. For citizens, the personalised consumer experience and prices are widespread. Sustainable consumption is not of highest priority for all. A trend for responsible living and consumption is emerging, mainly driven by young people. Yet, the "technological optimists", representing the majority of consumers, are not willing to change their consumption level drastically, and tensions are growing between these two groups.

In this scenario, the economy in many Member States has not recovered properly even 10 years after the outbreak of the pandemic. This development has hit the economically weaker states far harder than the other states that had prosperous economies before 2020. The main reason is that the vaccination rates were too low in most Member States, even after a second and third winter with lockdowns and curfews for those not recovered or vaccinated. While a large proportion of consumers continued to shop almost exclusively online after the first lockdowns, there are people in marginalised social groups who have not been able to embrace this change for a variety of reasons. The openness to data sharing for health, safety, and other communal reasons since the rise of online activities to overcome the lockdowns, are transferred to data sharing across many other contexts. The pandemic affected tourism in the EU: Self-organised camping holidays are mainstream in 2030, and the number of people spending holidays in their own region is still high. The economic consequences of COVID-19, especially the global supply-chain interruptions, reduced opportunities to buy sustainable products due to income, and the negative effects of online retail on energy consumption and CO_2-emissions, have hindered the achievement of the EU's climate goals. Many citizens could not afford pricier sustainable products, although available in most grocery stores, online and offline. The inequalities across the Member States and the different fiscal strategies to catch-up contributed to the political tensions between the countries. As a result, solidarity among citizens within the countries and among the Member States is waning. Again, some Member States are threatening to leave the EU, in particular those with an influx of populist parties due to income inequalities, effects of vaccination scepticism, declining trust in governments and xenophobia.

Scenario: Mitigated inequalities and green technology

In 2030, many EU Member States have successfully mitigated the inequality increase after the pandemic. Green growth is a successful concept in many sectors, green innovation and green-tech made in Europe are booming. Overall employment is rising, but the structural change towards a digitalised economy also causes job losses in some traditional branches as well as in rural areas. At the same time, many of the rural areas, which were at risk of being depopulated at the early 2020s, are now revitalised through digital infrastructures and attract young families and people who aim for a responsible and sustainable lifestyle while earning a living through remote work. "Fairness by design" and strict data protection regulations for platforms are implemented to protect consumers across the Member States. Consumption is high, yet sustainable consumption is not a priority for all.

In this scenario, the experience of the pandemic has pushed anticipatory governance in support of the twin transitions. The policy measures around and quickly after the fast uptake of the digital economy, in particular digital consumer rights for European online platforms was a catalyst for the green transition and innovative business models to support the economic recovery in the Member States. Several laws and regulations for climate neutral technologies, products and business practices were introduced successfully across the EU economies. Yet, it takes some effort and time to negotiate the measures and regulations for climate-neutrality in all sectors between the Member States. Furthermore, several EU countries started political measures such as basic income to protect vulnerable groups during the difficult post-pandemic times. Most of these programmes led to less income inequality and higher disposable income for a large share of the population, compared to the situation in the early 2020s. A framework programme against misinformation with its national centres is successful. It has been established as a response to the populist media activities during the pandemic in order to balance media and social media posts for information and to protect citizens from misinformation.

Scenario: Inequality to the breaking point

In 2030, income inequalities in all Member States significantly increased the social division between wealthy households and those struggling with no or little income is at the highest rate since decades. Most economic systems in the EU focus on GDP-growth. Only very few countries are on their way to implement a post-growth-oriented economic system, which they have started to experiment with during or right after the COVID-19 pandemic. For the rest of the countries, post-growth ideas like frugal consumption were just a hype. Climate change causes a lot of irreversible damage, bringing the social welfare systems of national economies to its limit. Many citizens are working, learning, getting entertained and interacting with others online in augmented realities. They use digital twins of their life, provided by global platform companies. This has led to a data capitalism without any real guarantee of data protection and privacy for citizens. The level of consumption among European citizens is high and a key factor for their social identity. Most consumers believe that they can achieve the sustainability goals only with the help of innovative technologies; the tech-optimists are trendsetters in consumer behaviour.

In this scenario of 2030, the post-pandemic struggles and the increase of natural disasters have strong effects on the entire economic situation in Europe. Despite attempts to counter this with policies, many European citizens live in poverty. The costs for the Member States to bridge the gap between rich and poor citizens or to limit the immense inflation since the pandemic in 2030 are too high, public debts are rising and limit the financial possibilities for welfare programmes. The attempts to achieve the sustainability transition seems to have died down in the Member States, simply because economic and social inequalities are of higher priority. The lockdowns and restrictions during the COVID-19 crisis have boosted online shopping, education, and work in 2030. Consumption is high and there is a strong demand for sustainable products and services, as long as they can be purchased online for those who can afford it. In 2030, people realise that the COVID-19 crisis leaves a "lost generation": The children and adolescents that experienced the restrictions and lockdowns from 2020 to 2022, in some countries due to vaccination refuse even until mid-2020, are suffering from the poor education during home schooling and of limited job opportunities in post-pandemic times. Many feel forced into a passive role and dependent on the help of others, and consequently have little trust in governments who fail improving their situation. The pandemic has severely shaken trust in public information and media. Social disparities between people following green, social and liberal parties on the one hand and those who support extreme nationalist and populist parties on the other hand are large.

Visions for consumption in 2030

The further analysis of the scenarios, carried out together with experts and stakeholder in several workshops, focused on possible gaps between the four scenarios and the goals of the New Consumer Agenda. The outcome of the analysis are four visions for the future of consumption in Europe in 2030. They reflect different consumers' needs, including those of vulnerable groups and consumers with special needs:

➢ I am empowered to buy "responsibly" by accessing "responsible" data.
➢ I am sharing, renting & repairing.
➢ I can choose to live in a digital environment, where I can be in control.
➢ I can safely co-create and test new products, services, and business models.

The visions were the starting point for the prioritising of action fields and the development of policy ideas in stakeholder dialogues.

Suggestions for policy actions

Ten suggestions for policy actions have been developed in the foresight study. They are intended to complement the New Consumer Agenda to address the impact of COVID-19 on consumer behaviour and consumer protection, especially for vulnerable groups. They have been developed together with stakeholders from different regions of the EU and experts from different disciplines and show where there is a particular need for action from a stakeholder perspective to make consumer policy future-proof after the pandemic.

The stakeholders have prioritised seven action fields to achieving their visions in 2030. The suggested policy actions for each illustrate from the stakeholders' point of view that urgent action is needed in these areas to protect and empower consumers in light of the changes in consumption brought about by the pandemic.

Action field 1: Product labelling

> **European   Agency   for   Sustainability**
> The agency should build centralised and horizontal capacities across the EC in order to design, implement and monitor the sustainability criteria across the DGs and to coordinate the various policy activities, ongoing and new ones. It would approve labels and pilots to test new labels and criteria using digital tools. It would serve DG JUST as an alert system for emerging consumer issues.

> **Continue   to   support   standardisation   with   financing   initiatives**
> It is of high importance for the success and adoption of the new labels that industry is fully involved in the development of standards. The EC should provide resources with which also consumer organisations could participate. Both the industry representatives and consumer organisations have expressed their willingness to support the label and participate in the development.

Both actions could be linked to several priority areas of the New Consumer Agenda, specifically the impact of COVID-19, the green transition, redress and enforcement of consumer rights, specific needs of certain consumer groups, international cooperation, and governance.

The interests of vulnerable groups are addressed by providing all information needed in one label, easy and barrier-free to access online, at the point of sale and on the product packaging. This would be guaranteed by involving representatives from groups with specific needs and diversity experts in the design process.

Action field 2: Consumer product dataspaces

> **Facilitate   connection   for   decentralised   system;   built   on   QR   technology**
> The EC should promote the joint establishment of a system in which decentral available data and information on products are brought together. This is essential since the surge in online activity during the COVID-19 pandemic to make the variety of data meaningful to consumers. In addition, there is a greater need on the part of consumers for information on the relevant product properties. The suggestion is not to build the dataspace but to promote its ideas and bring the interested parties together.

The focus of the suggestion is on the European markets. Of course, many goods are produced in countries outside of the EU. Therefore, the action suggested here should be linked to the policy suggestion no. 10 (see below), where international partnerships are suggested.

The policy suggestion is relevant for the priorities of the impact of COVID-19, green transition, digital transformation, and specific needs of certain consumer groups of the New Consumer Agenda.
A well-structured and connected dataspace would support consumers with special needs to find the specific information they need in a barrier-free way. Furthermore, users can provide information for other consumers with similar needs and thus empower vulnerable groups.

Action field 3: Sustainability by design

> **Intensify   consumer   information   with   networks**
> The organisations and initiatives in the Member States with their platforms, local dialogues and workshops, can help to strengthen the active co-creation of framework conditions for sustainable consumption and consumer information on various aspects of sustainability in the long term, thereby enabling more consumers from different groups to make sustainable purchasing decisions. Therefore, it is suggested to support the most promising activities and actors of change from industry and also involve representatives of marginalised and vulnerable groups in particular, so that their needs are also taken into account.
> **Adjust   legislation   where   necessary   and   possible**
> It is suggested to identify needs and review existing legislation that may be hindering. Especially for new business models and forms of consumption in the digital world, the role of legislation needs to be reviewed with a view to introducing more sustainable models. The EC can start activities by observing and analysing ongoing changes in the markets because of the pandemic and anticipating

possible future gaps in the legislation. In addition, stakeholder dialogues are crucial to ensure that all interests are taken into account and that marginalised groups are included in the dialogues.

Both policy suggestions relate to several priorities of the New Consumer Agenda, specifically the impact of COVID-19, green transition, digital transformation, internal cooperation, and governance.

The suggestions are relevant for the empowerment of vulnerable groups as it is important to increase the share of sustainable products and services in the market and to make sure that all groups of consumers, in particular the ones with specific needs have access to these products and can afford it. New business models could increase access to greener products and services for all, e.g. sharing initiatives or repair and upcycling services. Furthermore, the criteria for sustainability have to cover all forms of sustainability, including social and ethical aspects. Standards are needed to guarantee that the products fulfil all criteria and that the information is available to all consumers. Finally, representatives from vulnerable groups and consumers with specific needs have to be invited to co-create the framework for sustainability by design and make sure that the activities will be inclusive.

Action field 4: Co-creation

> **Support design processes that put the consumer more in the centre (also with new technology)**
> The EC should provide further support for the development of processes and technologies that are more consumer-centred by institutionalising the participation of citizens and marginalised groups in the early stages of problem definition and solution development. This could be promoted, for example, through "ambassadors" and representatives in round tables or advisory boards in the development of policies, products and services. This would also facilitate mutual learning between industry and Member State policy makers and help to engage industry in initiatives such as a consumer co-design clearinghouse.

> **Identify and facilitate changes in legislation to promote purpose driven products**
> The EC should ensure that existing laws do not hinder developments towards purpose-built products. Instead, appropriate laws for change are needed. A study is suggested as a first step.

Both suggestions would contribute to the following priorities of the New Consumer Agenda: the impact of COVID-19, green transition, digital transformation, specific needs for certain consumer groups, and governance.

Action field 4 and the suggested actions are key for a better integration of vulnerable or marginalised groups in product design and development in order to meet the variety of needs and make products accessible and usable for all. Consumption patterns are changing during the pandemic and there are future uncertainties remaining how different consumer groups will be affected long-termed. Therefore, the learning from best practices through mapping of co-creation activities and the support of the implementation in time are needed to create opportunities for industry to better meet the changing needs.

Action field 5: Collection and use of personal data

This action field refers to the vision of increased benefit for consumers through the collection of personal data. The stakeholders discussed three ideas, but did not prioritise them. Approaches like user-centred design or privacy by design have been taken up by the New Consumer Agenda. Therefore, the ideas discussed for this action field are integrated in the suggestions of the following action field "Management of personal data".

Action field 6: Managing of personal data and preferences by consumers

> **Capacity building inside DG JUST for tackling consumer data**
> Further capacity building within DG JUST could be beneficial for the handling of consumer data, as a number of other issues will arise as the pandemic continues. There is a need to assess and review the existing rules and then improve them where necessary to better support data portability and integration with other applications. In addition, a longer-term study on technological possibilities of avatars etc. and their impact on innovative business models and services for consumer protection could be considered in this context.

> ➢ **Incentivise**   **changes**
> The EC should create incentives for change towards 2030, when data will no longer belong only to companies. Designing the process to 2030 would involve moving from data owned by companies to data shared and used by and with consumers. Such a process would need to clarify a broad range of questions, for example who should be involved and what technical solutions and requirements are needed. Pilots could be supported with use cases to test solutions in different environments where consumers use data for sustainability in innovative ways.

The suggestions relate to the New Consumer Agenda's priorities of the impact of COVID-19, digital transformation, redress and enforcement of consumer rights, and specific needs for certain consumer groups.

This action field is a key area of consumer protection. The rapid shift from offline activities to online shopping, work and learning because of the pandemic lockdowns has been easy or at least manageable for many citizens. However, the long-termed effects are not fully understood yet and it is already visible that specific groups were not able to manage it successfully. Therefore, further dialogues with consumer organisations and representatives of certain consumer groups have to be carried out to better understand their challenges, detect early warning signals of risks groups, and find ways to integrate them.

Action field 7: Agile and resilient consumer policy across government levels

> ➢ **Set**   **up**   **coordinated**   **action**   **with**   **partner**   **regions**
> The dialogues already initiated by the European Commission with consumer organisations are an appropriate approach to include different interests of consumer groups, industry associations, representatives of people with special needs and vulnerable groups. A next step would be to find new dialogue partners outside the EU to develop new forms of cooperation for standards of product safety, sustainability and mitigating supply shortages and strengthening the resilience of EU markets for future crises.

The policy suggestion can be related to the New Consumer Agenda's priorities of impact of COVID-19, digital transformation, redress and enforcement of consumer rights, international cooperation, and governance.

Interests of vulnerable groups are addressed in several ways: new risks have emerged for consumers and vulnerable groups in the EU since the pandemic. For instance, many products like hygienic articles or consumer electronics are scarce due to COVID-19 impacts on global supply chains. Furthermore, not all international online platforms are barrier-free and the demand of people with special needs is not addressed sufficiently at many online shopping platforms that are often owned by international corporations. It is important that all consumer interests are considered in transforming consumption and strengthening consumer resilience. The dialogues with consumer organisations already initiated by the EC are an appropriate approach to involve different consumer groups, industry associations, representatives of people with special needs and vulnerable groups. They should be continued and extended to additional dialogues in the Member States and with partners from outside the EU.

Conclusions

The New Consumer Agenda highlights the interactions between the twin transitions and addresses the challenges with a series of measures. The COVID-19 outbreak has massively accelerated both transitions and respective impacts. The challenge for the EC's consumer protection and empowerment in the coming years is therefore to adapt the activities already planned to a post-COVID-19 situation and the new pace of change in a globalised economy.

Consumers have been forced by the pandemic to fundamentally change their behaviour, such as working and studying from home, avoiding long-distance travel, dinners at restaurants, sporting and cultural events. It seems that some consumers want to maintain new practices permanently, e.g. working more in the home office, grocery delivery from local cooperatives or using the bicycle more often than the car or public transport for the sake of health and the environment. At the same time, many consumers yearn to catch up on many of the activities that are currently restricted, such as long-distance holiday trips or going to concerts.

While entire industries are threatened by the lockdowns, especially the creative industries, local specialised shops and tourism, the negotiation of future consumption practices will continue for some years after the end of the pandemic. It is not foreseeable which interests will prevail, which offers will disappear from the market and which new offers and markets may emerge. It should be noted that the consumers who have sufficient income and the technical equipment for more online and more sustainable consumption are a strong driving force of change. However, the remaining majority of consumers in Europe has not the power to initiate new patterns of consumption and they must not be excluded from the upcoming post-pandemic reorganisation of market and consumption structures.

All these aspects were taken into account in the study and the suggested policy actions based on stakeholder discussions and desk research relate to currently observable changes in consumer behaviour and the need for better protection and empowerment of consumers in times of the COVID-19 pandemic. A closer look at the suggested policy action fields and investigation of necessary measures to mitigate the pandemic consequences for consumers serves to strengthen the resilience of EU consumers for other crises in the future.

All suggestions for policy actions are in line with the New Consumer Agenda. The extent to which they might actually be taken up, further specified and implemented should be examined by the EC following this study. Some of the proposed policy actions represent an expansion or concretisation of already planned activities in the priority areas of the New Consumer Agenda, for example those on product labelling or management of personal data. Others represent new options for action that may not have been needed when the New Consumer Agenda was developed, i.e. before and/or at the beginning of the pandemic.

What are next steps?

The study was the first phase of future proofing the EU consumer policy in times of COVID-19 and it provides information on possible future scenarios, visions from a consumer perspective, stakeholder prioritised action areas and possible measures for prospective governance.

Stakeholders and experts were involved intensely in the development of the policy options. This implies that there is a certain degree of consensus across the different stakeholder groups about policy priorities related to the impacts of the COVID-19 pandemic on the future of consumption in the EU. The policy suggestions could serve as inputs to the debates and as a link to the policy instruments formulated in the Commission's plans set out in the New Consumer Agenda.

For some of the policy options, first actions can start in 2022, for others long-termed actions are suggested. Only with further enrichment through multi-stakeholder discussions and engagement, can the policy options become implications and lead to the formulation of policy instruments. Whether these policy instruments are legislatives, awareness raising activities, information platforms, initiation and support of stakeholder networks, capacity building activities, funding for research and innovation, or a combination of some of these, has to be further discussed and decided by the EC.

A main finding of this study is that despite the challenges posed to consumers by the pandemic, the trend towards sustainable consumption seems to be continuing, even if not all people can yet afford it financially or have access to the information and products they need to do so. Thus, despite the pandemic, the EC can continue to pursue its twin transition goal without running the risk of leaving out certain consumer groups.