

GO ELECTRIC

「 THE CLIMATE
COUNTDOWN 」

Ford



FOREWORD

The global car industry is in the throes of immense change. The shift to electrification not only represents the most profound overhaul of the auto industry in more than a century, but it will also usher in one of the biggest infrastructural shifts the world has ever seen.

A major factor in this move to electrification is the climate crisis, the effects of which are already being felt across the globe and increasingly difficult to dispute. The Intergovernmental Panel on Climate Change (IPCC) earlier this year said deleterious climate change was inevitable and, in some cases, irreversible. The material threat of climate change is real. And we have to help safeguard against threats to a healthy, stable environment, where all of us and our children, and grandchildren, can continue to enjoy all that our planet has to offer.

As an automaker, we recognise the role we play in providing solutions to climate change, and we are playing our part. Our industry has historically been a great enabler of change and progress, and I believe it will continue to play a prominent role in the flourishing of our societies for generations to come. But for this to happen, our industry and other key stakeholders – such as national and local government, energy providers and consumers – need to come together on this journey into electrification.

Earlier this year, Ford announced that we are all in on electrification in Europe; it's why we have one of the most ambitious plans of any auto company for the transition to an electric future. By 2030, all Ford passenger vehicles sold in Europe will be all-electric, with the majority of our commercial vehicles being zero emissions capable too. But we know there is much more to do in the transition to electric.

When we released the first Go Electric report in the UK in May this year, there was clearly a growing appetite for electric vehicles amongst the public, but also significant barriers. Consumers cited the lack of charging infrastructure, prohibitive cost, and perceived lack of range as the primary reasons for not considering an electric vehicle. The findings of this report, covering eight European countries, demonstrate that many of these barriers persist across the continent.

We said in the first report that knowledge and education would be key to getting consumers on board the electrification journey. Although there are still myriad challenges our industry and policymakers need to address, the fact that the public feel more informed around the topic is a good first step with getting the consumer on board. This needs to continue long after the crucial COP26 climate summit has left Glasgow.

Of course, the climate crisis is not solely about vehicles or transport. The move to electric vehicle technology is but one strand of a complex, multi-layered puzzle. The onus does not lie with a single company, industry, or sector – it is our collective responsibility for all of us to address. The level of change and collaboration will be uncomfortable at times, but wholly necessary.

For this report, we wanted to understand people's views around climate change more generally. The results are clear – there is overwhelming public support for measures to curb climate change. Not only is there support, but a majority of around 90 percent of Europeans feel some level of personal responsibility in the fight against climate change. With that responsibility also comes the recognition that sacrifices to our current way of living are necessary to reduce our emissions. According to our research, more than 90 percent are willing to make a sacrifice to tackle climate change by for example forgo foreign travel, reduce energy consumption, and change their purchasing habits to help fight the cause.

The European public is clear that they're willing to play their part. I firmly believe it is now incumbent on industry leaders and policymakers not to simply toe the line, but to make an emphatic case about the opportunities of electrification to consumers and to create the infrastructure necessary to support the vision. It is only with a unified approach that we can deliver on this promise and successfully make the switch to electrified vehicles.



STUART ROWLEY
PRESIDENT,
FORD OF EUROPE

CLIMATE CHANGE A KEY PRIORITY FOR EUROPEANS

The top concerns for Europeans are as follows:

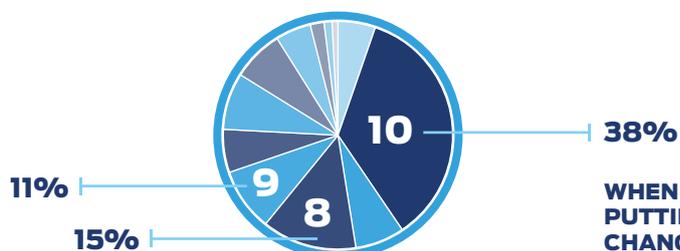


*sample was given the option of selecting more than one answer

CLIMATE CHANGE – IT'S PERSONAL!

90%

Overwhelming majority (90%) of Europeans feel a level of personal responsibility in the fight against climate change



WHEN ASKED TO RANK THE IMPORTANCE OF PUTTING IN MEASURES TO COMBAT CLIMATE CHANGE, 64% RATED IT 8 OR ABOVE OUT OF 10

A WORLD WITHOUT...

There is a broad consensus that sacrifices to our way of living will be needed to curb the worst effects of climate change, with more than 90% willing to make a sacrifice, and only 4% saying they'd be unwilling to make any personal sacrifice. The following highlights the key things that Europeans said they'd personally be willing to sacrifice:



Not using plastics / only using recyclable plastics



Reducing my energy consumption



Purchase mainly locally produced goods



Limiting purchase of new clothes



Using my car less



Not travelling abroad in aeroplanes



Only using renewable energies



Working remotely/not travelling into office



Stop purchasing items which are imported from foreign countries



Spending less time on phone



Only investing in businesses that are ethical



Not eating meat



Reducing time spent on laptop/PC



Not having a car



I don't believe there is a climate change crisis



Not willing to make sacrifices

WHAT DO EUROPEANS THINK IS THE BIGGEST CONTRIBUTOR TO CLIMATE CHANGE?



ENERGY FOR BUSINESSES



CAR INDUSTRY



AVIATION



FARMING



ENERGY FOR HOMES

NOT SURE 12%

OTHER 5%

WHAT'S ACTUALLY CAUSING CLIMATE CHANGE

According to the World Resources Institute, greenhouse gas emissions can be broken down as follows:

- Energy use in industry (24.2%),
- Agriculture, Forestry and Land Use (18.4%),
- Energy use in buildings (17.5%)
- Road Transport/Car Industry (11.9%)
- Industrial resources (5.2%),
- Waste (3.2%)
- Aviation (1.9%)

<https://ourworldindata.org/emissions-by-sector>

TIME FOR ACTION IS NOW

This is what the European public would like to see come about from the COP26 summit:



Global agreement on a carbon reduction plan



Penalties for businesses not seen to be positively contributing to the climate effort



More investment in carbon-neutral businesses



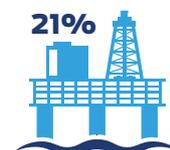
A plan and/or guidance for consumers to help reduce personal emissions



An immediate ban on investment in fossil fuel industries



Countries bringing forward their net zero goals



Ending oil & gas licenses

RESPONSIBILITY MAPPED

In this survey, Spain and Italy have the highest proportion of people who feel personal responsibility in the fight against climate change



Percentage of population who feel personal responsibility in the fight against climate change.

IT'S NOT EASY BUYING GREEN

86% OF PEOPLE

think it's important that they buy products from businesses that have a positive or carbon-neutral impact on the environment – with over half (56%) saying it is either very important (40%) or the most important thing they consider (16%)



FULLY CHARGED IS EUROPE EV-READY?



39% of Europeans are worried about where they could charge their electric car; unsurprisingly a similar percentage (40%) said there aren't enough charging points for EV.

26% say they think EV technology needs to improve before considering it as their next vehicle

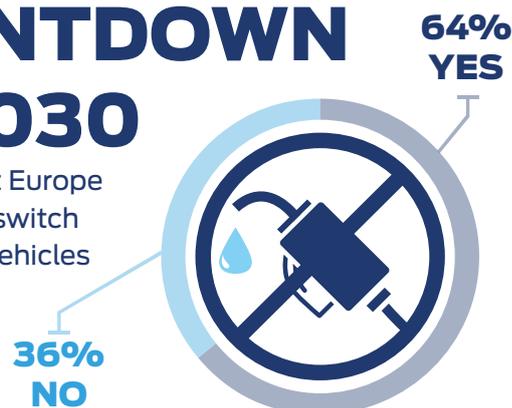
48% say they think the initial cost of EVs need to come down before they'd consider switching

MIND THE KNOWLEDGE GAP

36% of people still feel they lack the information and knowledge to buy an EV.

COUNTDOWN TO 2030

64% think that Europe will be able to switch to all-electric vehicles by 2030.



THE FORD VIEW

Home charging with Wallbox chargers or similar could represent the most efficient way of charging an electric vehicle, as they can be installed at home and left to charge overnight. However, public charging infrastructure which caters to those who don't have access to off-street parking is a necessity, as is a proper high-power DC charging network to enable long-distance traveling with electric vehicles.

RANGE ANXIETY PERSISTS:

30% say they're worried about EVs running out of power or using them on long trips.





EUROPE COMPARED



94%

Spain and Italy have the highest proportion (93% and 94% respectively) of people who feel personal responsibility in the fight against climate change. Germany (85%) and Norway (87%) have the lowest.



37%

Italy and Spain have the highest proportion who'd be willing to use their car less (37%). Norwegians are least likely to want to limit their car use, with just 25% saying they'd be willing to do this.



34%

More Brits (34%) think agreeing a climate change plan is a priority than the rest of the Europe. However, a higher proportion of the Italian (36%), Spanish (29%), French (29%) and German (28%) population think stricter measures to curb climate change need to be put in place immediately.



38%

Norway was the only country not to place recovering from the pandemic as the principal issue facing Europe; for Norwegians, improving mental health provision was selected by 38%, with just 25% saying tackling



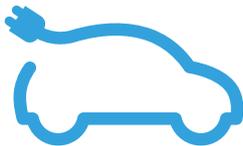
26%

COVID-19 was a key issue. According to a quarter (26%) of Italians, buying products from businesses that have a positive or carbon-neutral impact on the environment is the single most important product consideration. This is significantly higher than the European average (16%).



44%

Brits are more likely to sacrifice purchases of new clothes than anywhere in Europe. 44% said they'd be willing to limit buying new clothes, versus 32% in France, 31% in Germany and 30% in Spain.



70%

Italians are most confident of being able to go all-electric by 2030 (70%), followed by France (69%), and Norway (67%). Germans are least confident, with just 58% saying they think it is possible.



49%

Spain has the highest proportion (49%) of people who are concerned about where they could charge their electric vehicle. This is followed by the UK, at 47%, and Poland at 44%. Norwegians are the least concerned about charging issues, with just 29% saying they are worried about where they would charge their EV.

RESEARCH METHODOLOGY

To better understand attitudes to climate change, as well electric vehicles, we commissioned research of 14,000 adults across Europe in October 2021. The surveys, conducted by independent research agency OnePoll, covered respondents in the UK, Germany, Italy, Spain, France, The Netherlands, Norway, and Poland. The sample for each country was nationally representative, and the survey adhered to MRS code of standards.