

GO ELECTRIC

THE ROAD TO 2030
AND THE UK'S
ALL-ELECTRIC FUTURE

Ford | BRING ON
TOMORROW



FOREWORD

Welcome to the first of our regular Go Electric consumer reports.

Intended to act as a regular barometer of the British public's views on Electric Vehicles (EVs), this series looks to unpick the opportunities and potential challenges to EV adoption in the UK.

Last year, the UK government announced that it will ban the sale of petrol or diesel vehicles from 2030. This comes as the country makes the switch to electric (and zero-emissions) alternatives, as we bid to tackle the climate change emergency.

Ford is 'all in' on electrification, and we believe we are leading the charge in the UK's transition to fully electric vehicles (EV). But we also understand that the move to EVs won't happen overnight; in reality, there will be no flick of the switch moment, where suddenly the 37 million cars on our roads are EVs. In order to get that point – which, at just 8 years away, is fast approaching – there is much that needs to happen.

Indeed, the shift to an electric future represents the most profound change to the auto industry in a century; it also has ramifications for every person in the UK. The scale of the challenge is huge. What is also clear is that we – the government, local councils, the automotive industry and energy providers – need to take the consumer on that journey with us.

This is why we've created our Go Electric campaign. This report is the first in long-term commitment from Ford to help educate our customers and get them ready for the electric transition. As a business, we recognise the critical importance of understanding the barriers people face when it comes to adopting electric vehicles. We wanted to see what the sentiment around EVs were, and to see if there was a clear consensus. As the word cloud on pg4 makes clear, there is no public consensus when it comes to EVs.

Instead, it's clear that a considerable proportion of the UK that aren't sold on the idea of electric vehicles. The reasons for this are numerous and varied; the root cause of the hesitancy, however, seems clear – lack of understanding.

The research we conducted points very firmly to the fact that the public simply don't know enough about

the technology to feel confident about it. In fact, 60% of the people we asked for this report said they didn't feel they had all the information to make an informed decision on electrification. Three-quarters of the people we surveyed admitted to being confused by electric vehicles.

There are other areas which also pose significant barriers in the minds of our customers: the lack of a charging network was consistently cited as a major concern for people, and, despite advancements made in EV technology in recent years, many people are still concerned that electric vehicles won't suit their lifestyle. Myths and misconceptions abound. That's why it's critical that we show that 'EV' doesn't mean compromise.

Of course, consumer demand is just one piece of the puzzle. What is also needed urgently is a roadmap that sets out exactly how the UK will achieve its fully electric ambition. Such a plan requires coordinated effort from auto manufacturers (to provide the cars), energy providers (to provide the clean energy) and the government (to provide the infrastructure). The onus is on all of us to make sure we deliver on the promise.

There is real urgency to this. The time for talking about targets is over; now we need to plan how to make this future a reality. Ford is ready and willing to play its part in the electrification story, but it requires collective effort to make it work.

We know from the success of our COVID-19 vaccine programme that we can do incredible things when working collaboratively towards a singular goal. We need that same spirit of collaboration and drive to realise our electric opportunity.



STUART ROWLEY
PRESIDENT,
FORD OF EUROPE

EXEC SUMMARY OF RESEARCH

RESEARCH METHODOLOGY

We have commissioned a survey asking 2000 drivers from across the UK a series of questions relating to their current and future driving behaviours.

The survey, conducted by independent research agency OnePoll, covered a range of broad topics: where people would charge their car; what they think about upcoming ban on diesel and petrol cars; the decision-making factors when it comes to buying a car; their knowledge on Electric Vehicles; and, crucially, if they could ever see themselves buying an electric vehicle.

Widespread confusion about electric vehicles amongst the UK population persists

- Majority of consumers (61%) don't feel they have enough information to make an informed decision on purchasing an EV
- More than half (56%) don't know the difference between electrified vehicle types
- Just one in five (20%) say they'd be comfortable explaining electric vehicle technology to a friend.
- 70% don't know what a mild-hybrid vehicle is; 1 in 4 don't know the difference between a plug-in or battery electric vehicle

EVs are becoming more mainstream...but there is still a long way to go before they are fully accepted

- 28% plan to buy an EV over the next 5 years; of these, just 1 in 10 say it will be their next vehicle purchase
- But one in five (21%) people say they have no intention of buying an electric vehicle; and a further fifth (21%) say they won't buy an EV until they have no other option
- More than half (52%) say they wouldn't be able to charge from home

Who's in charge of charging?

- More than half (55%) say they don't think the UK has enough charging points; 52% say they currently don't have access to chargers
- 41% say they are worried there will be nowhere to charge near their home – this is the second biggest barrier to owning an EV
- Majority think it is the government's job to ensure that the infrastructure is in place to

charge all necessary cars (67% said national, 53% local). Energy providers were next, with 35% saying they felt the onus was on them. Car manufacturers came in last at 31%

Affordability, more range and reliability are key to making EVs more attractive

- More available charging points would be the biggest incentive to purchase an EV (45%); government grants are 2nd (43%)
- Nearly 4 in 10 (38%) said if they would purchase an EV if it was proven to be cheaper to run than petrol/diesel alternatives

Is the UK public ready to 'go electric'?

- Asked if the ban on petrol and diesel were to come in force next week, more than two-thirds say they wouldn't feel confident buying an EV as their purchase
- 57% think a coordinated plan from government, energy industry and car industry is needed if the transition to electric is to be successful
- More than two-thirds (72%) think more charging stations are needed before considering an EV

Ford second most trusted when it comes to brands making a success of electrification:

- 1st Tesla – 34%
- **2nd Ford – 26%**
- 3rd Nissan – 24%
- 4th VW – 23%
- 5th BMW – 20%

The topic of electric vehicles tends to elicit a strong, diverse mix of opinions. If the UK is to make a success of electrification, every customer needs to be taken on the EV journey. Listening to their feedback and concerns is the first step in this process. That's why we asked some of our survey respondents to sum up their feelings on EVs in a sentence. These are some of their responses



Range anxiety

Too complicated

Won't have a choice but to go electric

They are a danger to pedestrians as so quiet - they should have a motor sound fitted Charging is not suitable for the disabled
Waiting lengthy time to charge

I only want a petrol car. That's what I've always been familiar with **Constantly improving technology**

Government won't ban fossil fuels until electric cars and infrastructure is ready It's the future, so may as well embrace it now
Don't know enough about them to make a choice

Not good for the environment, where is the electric coming from? **NOT interested**

I like classic cars
Insufficient range before having to wait for a recharge

When the police choose to use them then I'll think about it
They are not as environmentally friendly as they make out **More damaging to the environment in manufacture AND THERE IS NOT ENOUGH ELECTRCITY GENERATED TO FUEL THEM!!!!!!**

They do not yet make an EV that fulfils the specific needs of my business **Better for environment**
The range is too low! I need it to go at least 120 miles on 1 charge

Not confident that current EVs have the range I want Think it's a necessary transition **I just don't want an electric car**

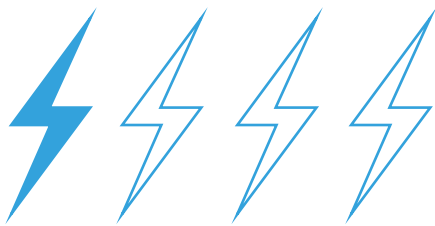
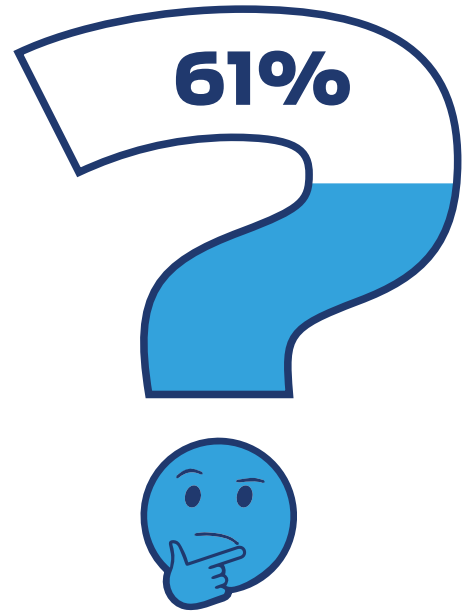
Expensive and NOT good for the environment

It's a technology that will come to stay



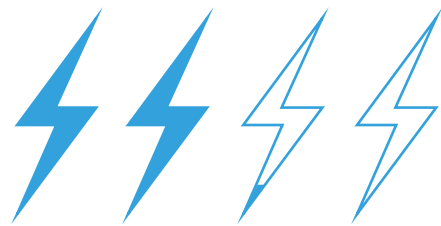
CONSUMER CONFUSION CONTINUES

Majority of consumers (61%) don't feel they have enough information to make an informed decision on purchasing an electrified vehicle



1 IN 4

25% explicitly say they are confused between different types of electrified vehicles.



OVER HALF

52% are not confident that they know the difference between electrified vehicles.



Mild Hybrid



Plug-In Hybrid



Hybrid



Battery Electric



PURCHASING INTENTIONS

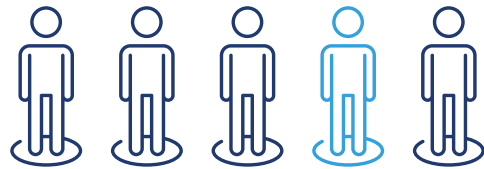
OVER 1 IN 10

(13%) of these say it will be their next vehicle purchase



1 IN 5

However, one in five (21%) say they have no intention of buying an electric vehicle...



1 IN 5

...and a further one in five (19%) say they won't consider buying an EV until they have no other option

COST

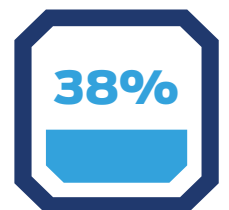
ONE THIRD

(32%) don't know whether charging would be more or less expensive than using petrol/diesel.



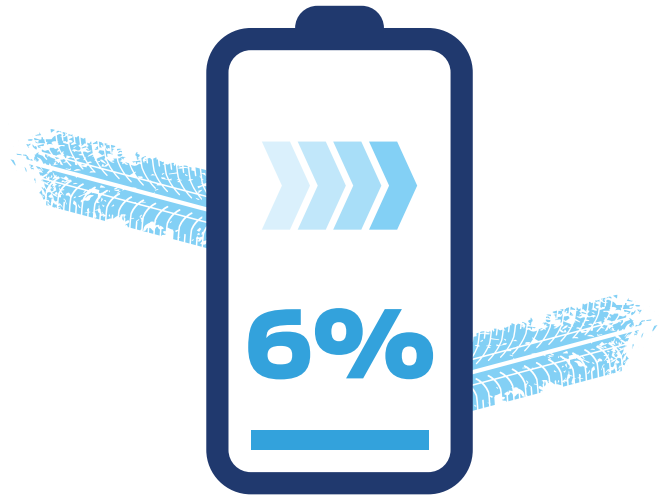
NEARLY 4 IN 10

(38%) said they would purchase an EV if it was proven to be cheaper to run than petrol/diesel alternatives



RUNNING OUT OF POWER

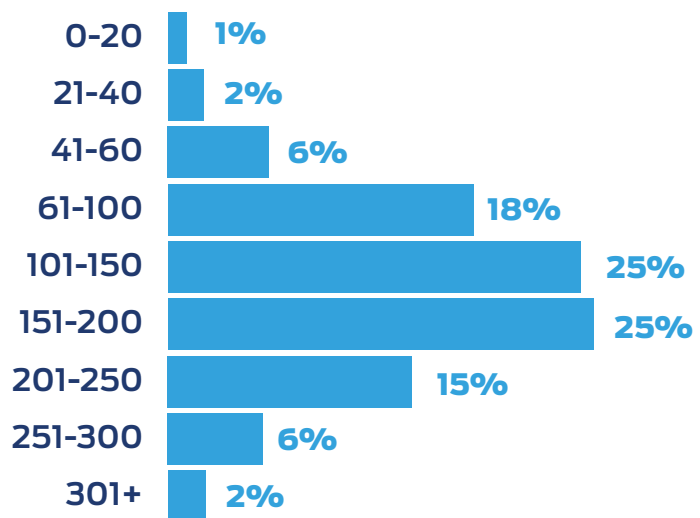
Despite the great advancements made in the last few years, a large proportion of drivers still think range is a big issue. The average range that consumers think a BEV can travel between charge is 149 miles. Just 6% think an EV can have a range of 250 or over.



Mustang Mach-E boasts

379 MILE RANGE

How far (in miles) do you think the average full-battery electric car can travel between charges?



Average 149.1



RURAL VS URBAN ATTITUDES

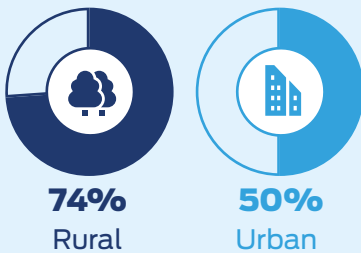


Rural
(countryside, village)

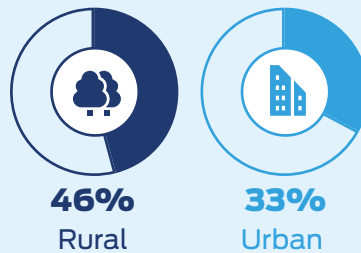


Urban
(including city)

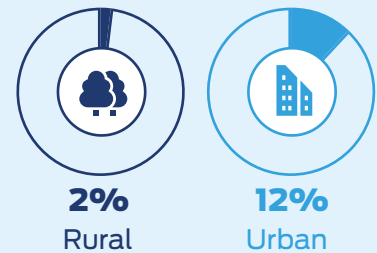
Don't think there are enough **charging points**



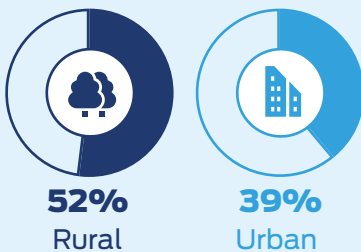
Don't think there is enough time for the **national switch** by 2030



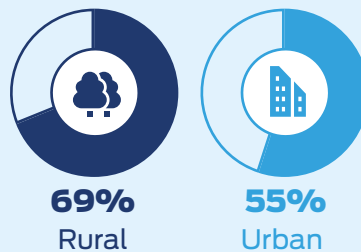
Urban drivers more concerned with what other drivers think of them



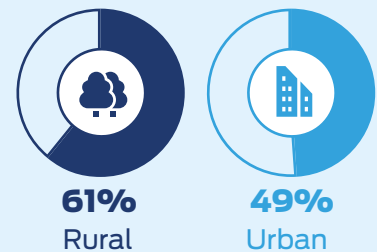
Agree that **government grant** would help them switch to electric



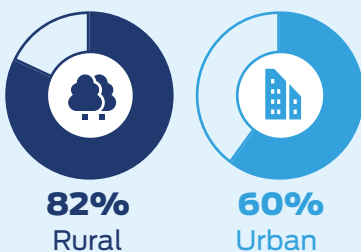
Agree that they don't have enough **information** on electric cars



Agree that there isn't enough **infrastructure** for them to consider an electric vehicle



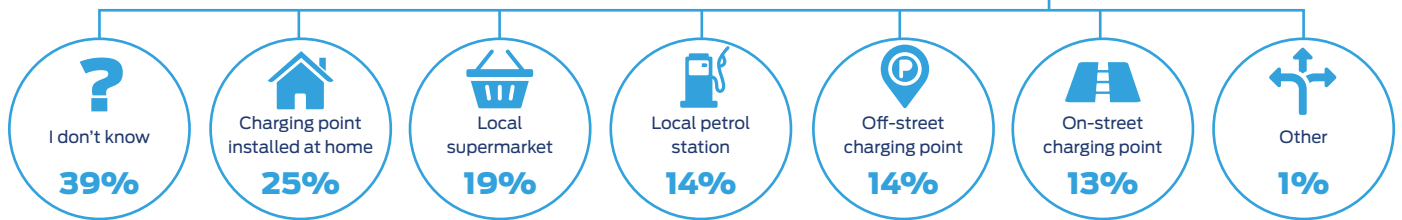
All areas agree that it's the **government's** (national and local) responsibility to ensure there are enough charging points



FOCUS ON: CHARGING



If you were to buy an electric vehicle tomorrow, where would you charge it?



OVER HALF

(55%) say they **don't think there are enough charging points**



52%

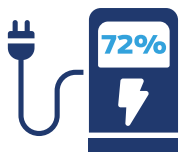
At present, over 27 million UK drivers do not have access to chargers



51% say they would be reliant on public charging network



will be reliant on public charging spots



WELL OVER TWO-THIRDS

(72%) think more charging stations are needed

WHO'S IN CHARGE OF CHARGING?

A strong majority think it is the government's job to ensure that the infrastructure is in place to charge all necessary cars (67% said national, 53% local). Energy providers were next, with 35% saying they felt the onus was on them. Car manufacturers came in last at 31%.



57%

think a coordinated plan from government, energy industry and car industry is needed if the transition to electric is to be successful

THE ROAD AHEAD

4 KEY ASKS

2021 could be a watershed moment for the global response to the climate emergency. At November's crucial COP26 summit in Glasgow, the UK has the chance to show that is leading the way in our decarbonisation approach. Committing to an electrification roadmap is one way to show the country is serious about this. In our view, any plan needs to factor in the following areas:

- 1. Comprehensive Roadmap:** an action plan led by Government and agreed by all relevant stakeholders, which sets out the 'how' and 'when' of the switch to electrification
- 2. Charging Infrastructure:** charging points need to be accessible for all with public charging points required across the UK so that no regions are left behind
- 3. Incentivisation:** a need for a comprehensive regime of both purchase and usage incentives that encourage consumers to adopt all-electric and plug-in hybrid technologies
- 4. Information for all:** consumers have said they do not feel that they have enough information on electric vehicles. This requires a collective effort from all stakeholders to ensure customers have confidence in the technologies

