

LOOKING
FURTHER
WITH FORD



2019 Trends



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The Power of Behavioral Change

This year, in our seventh annual Further with Ford report, we looked deep into the drivers of behavioral change, unpacking how trends are influencing change across key areas of our lives, and the roles that both technology and self-determination play in bringing these changes to bear.

We set out to find the seeds of positive change — the ways in which we are pushing, and being pushed, to do better and be better. Because even if change makes us feel uncomfortable, we can always look inward and control our own actions — and when we focus on actionable behaviors, we can do wonderful things.

At Ford, we are deeply focused on human-centric design, and committed to finding mobility solutions that improve the lives of consumers and their communities. In the context of change, we have to protect what we consider most valuable — having a trusted relationship with our customers. So we are always deliberate and thoughtful about how we navigate change.

Individually and collectively, these behavioral changes can take us from feeling helpless to feeling empowered — and unleash a world of wonder, hope and progress.

Enjoy.



Sheryl Connelly
Global Consumer Trends and Futuring
Ford Motor Company

“Hope drives change.”

Global average, all adults

86%
agree

48%
agree

“Fear drives change.”

Global average, all adults

33%
agree

“I’m energized by change.”

Global average, all adults

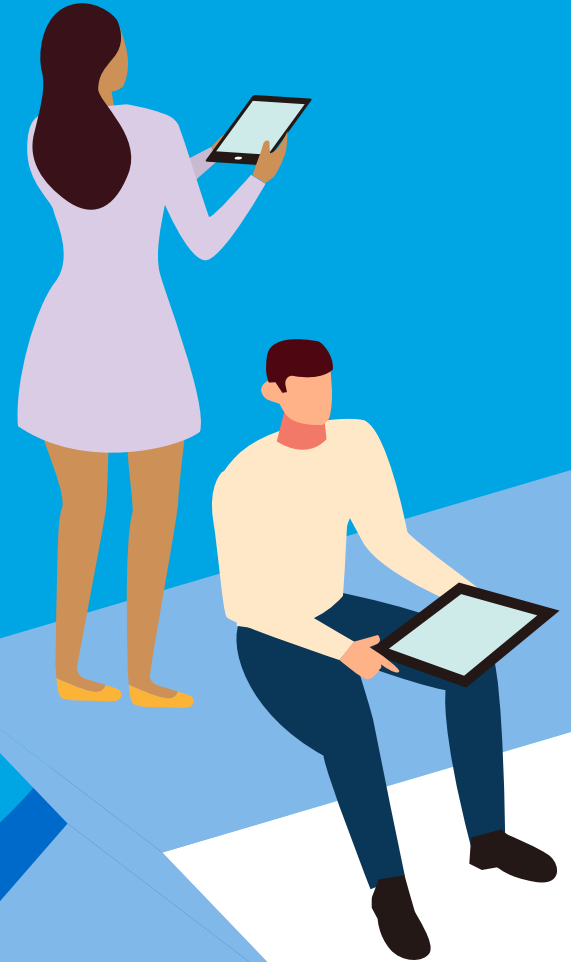
71%
agree

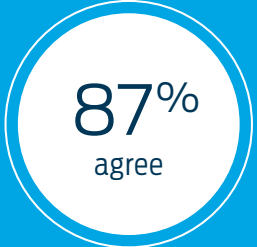
“Change scares me.”

Global average, all adults

THE TECH DIVIDE

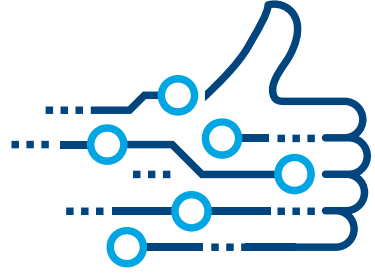
In every country we surveyed, roughly 80 percent or more of respondents agreed that technology is today's biggest driver of change. Yet there's an underlying tension — while strong majorities view technology as a force for good, many are wary or fearful of unforeseen consequences. As consumers, corporations and governments seek to make smart choices about how to use technology, they must understand what it can do, how to effectively use it, and how and when to set meaningful boundaries.



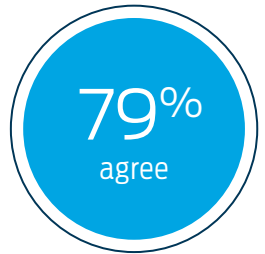


“Technology is the biggest driver of today’s change.”

Global average, all adults



“I believe that technology is a force for good.”



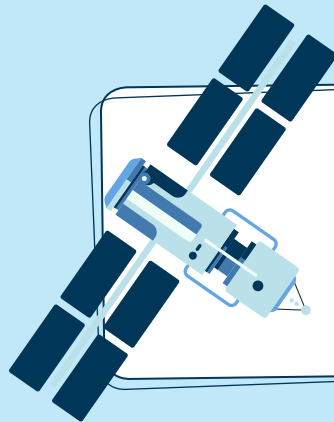
Global average, all adults



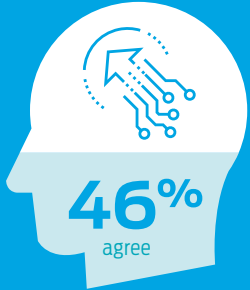
In the United Arab Emirates, Dubai has launched the Dubai 10X Initiative — which includes plans to test the DNA of its 3 million residents to create a genomic database. The hope is to identify genetic disorders and adopt customized treatment and medicine — and encourage lifestyle changes for those at risk.



In the U.S., researchers at Boston Children's Hospital and Harvard University created a soft robot sleeve that wraps around a failing heart and squeezes it to keep blood flowing throughout the body — in hopes of ultimately using it to save human lives.

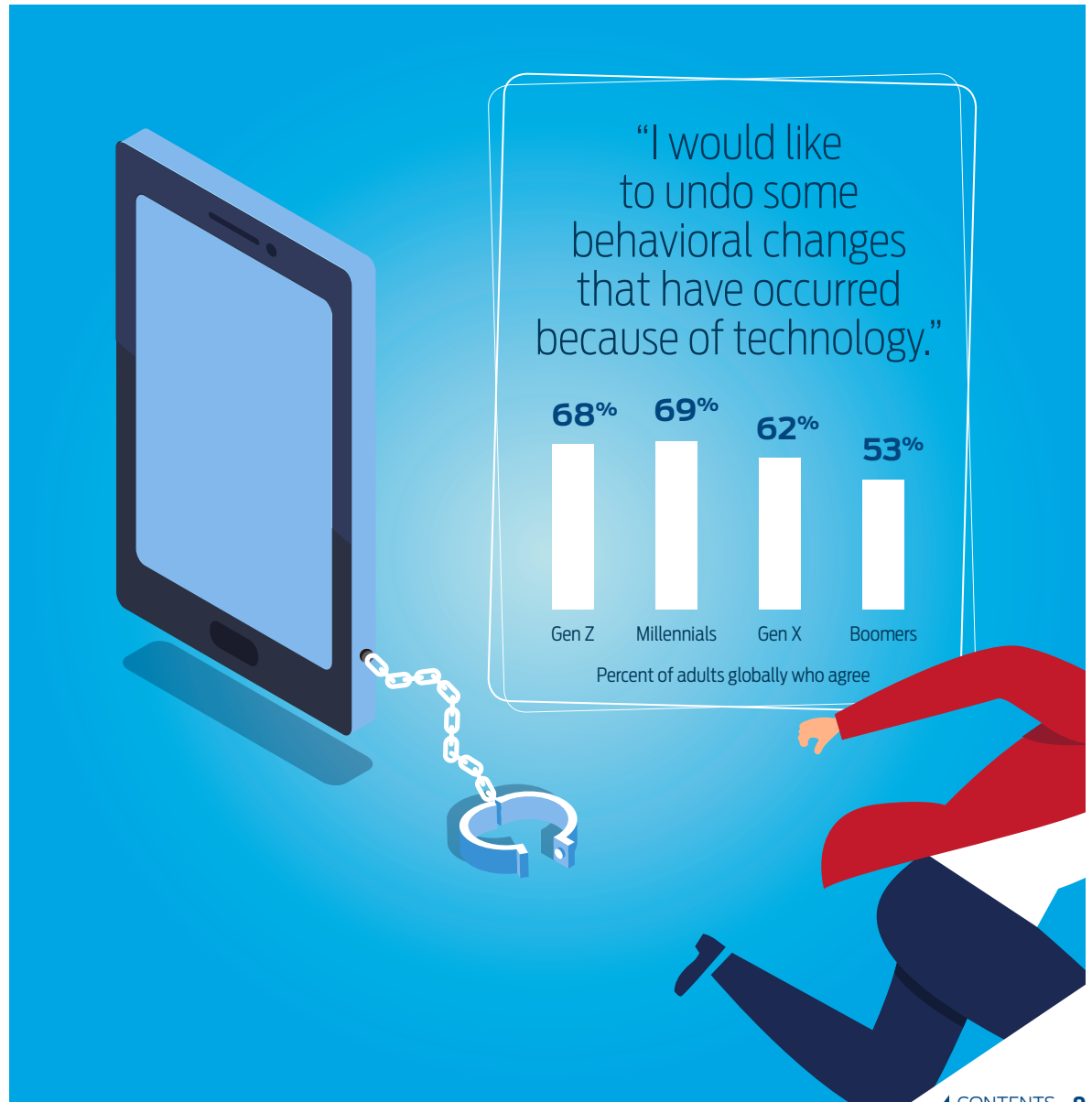


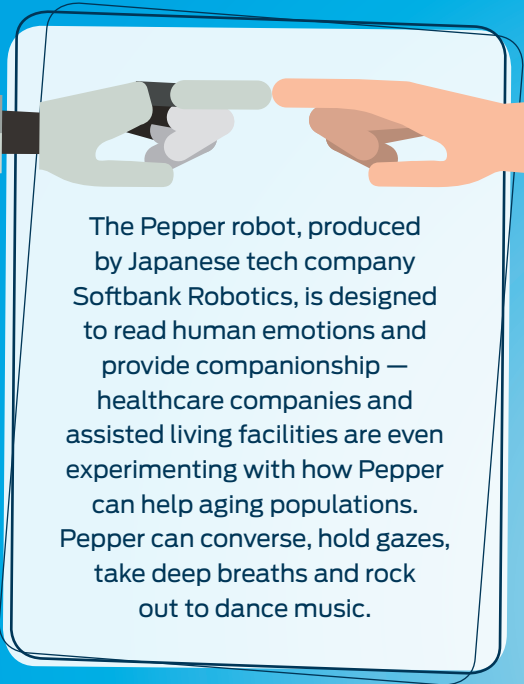
Google is working to curb illegal fishing through the use of artificial intelligence and satellite data. The Global Fishing Watch pulls in 22 million data points to show in near real-time where fishing is happening — and where it's happening illegally.



Global average, Gen Z

“I fear that technology is trying to get inside my head.”



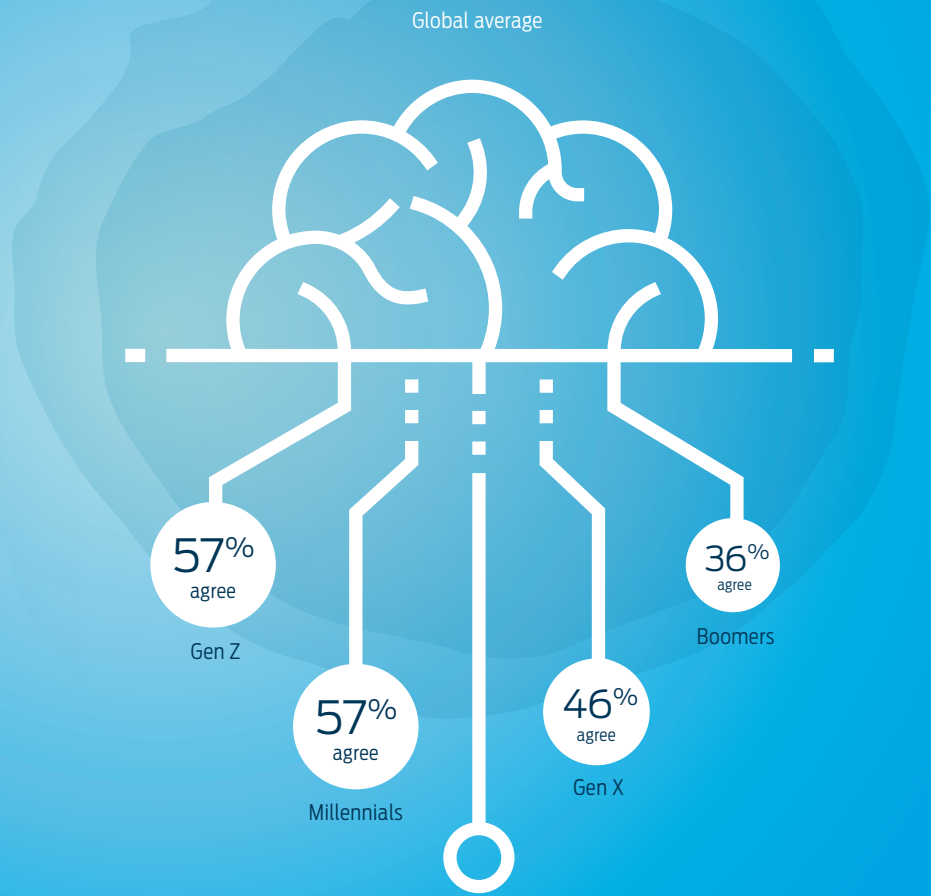


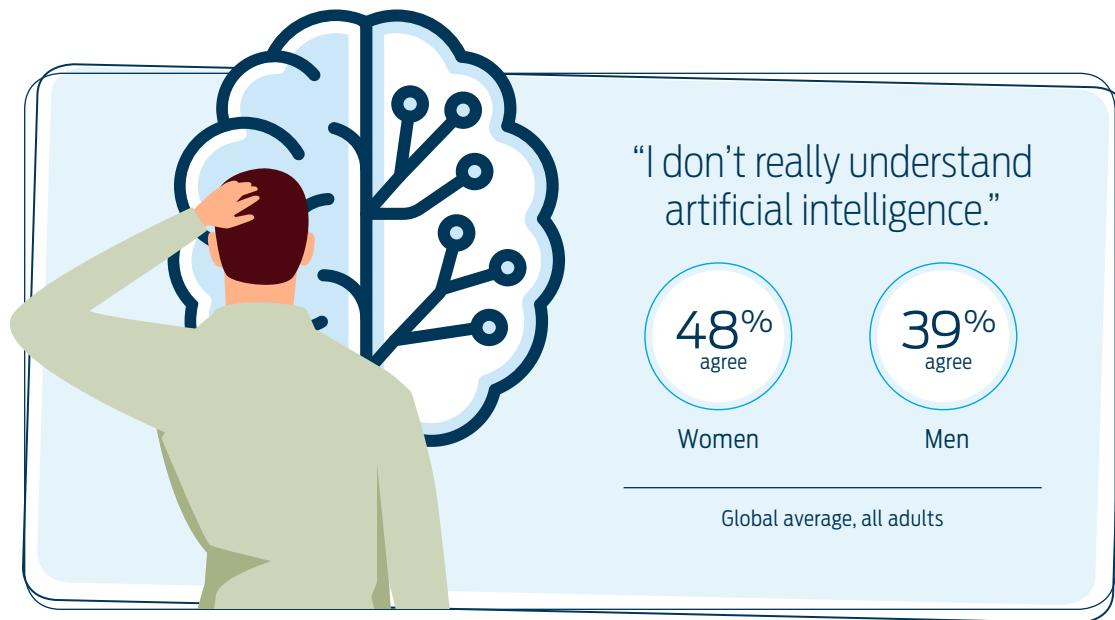
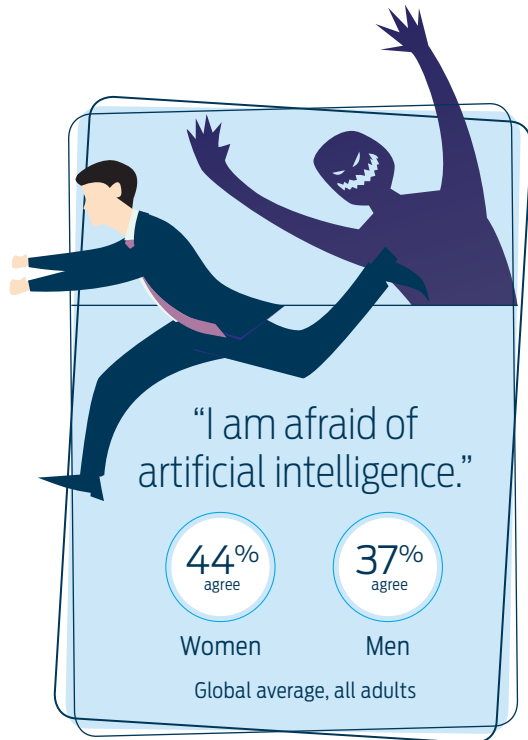
The Pepper robot, produced by Japanese tech company Softbank Robotics, is designed to read human emotions and provide companionship — healthcare companies and assisted living facilities are even experimenting with how Pepper can help aging populations. Pepper can converse, hold gazes, take deep breaths and rock out to dance music.



China is increasingly relying on facial recognition to identify criminals — even down to infractions like jaywalking. As of July, China had an estimated 200 million surveillance cameras, according to a *New York Times* report — with plans to add many more.

“Artificial intelligence will be stronger than the human mind within 10 years.”





OUR TAKE

At Ford, we are harnessing technology such as driver-assist features, a self-driving system and FordPass™, our mobility app, to help people move more safely, confidently and conveniently. Our goal is to become the world's most trusted brand by making new innovations easy to use, reliable and enjoyable, rather than overwhelming. We are working to develop a Transportation Mobility Cloud that connects people, autonomous vehicles and city infrastructure. Tech is also key to the work of our City Solutions team, in which we collaborate with cities on how to implement the physical and cultural infrastructure needed to help residents move more freely. In Miami-Dade County and Washington, D.C., this team is critical to helping us understand how officials and communities want to see self-driving vehicles deployed to address their specific issues.

DIGITAL DETOX



When it comes to digital devices, people are increasingly concerned about overuse — wondering if they've become too dependent on digital tools. As such, they are becoming more mindful of the time they spend online, and the need to disconnect and pursue greater well-being in their offline lives.

Looking for a quiet place to have a conversation or hear yourself think? A U.S.-based app called SoundPrint quantifies noise levels in venues across 2,000 cities. An analysis of Manhattan venues found that more than 70 percent of restaurants and 90 percent of bars rated at least 76 decibels, the sound equivalent of a running vacuum cleaner.

“I should do more to exercise self-care.”



76%
agree

Global average,
all adults



“We should have mandatory timeouts from our devices.”

69%
agree

Global average,
all adults

Studies show that writing in a journal can lead to a stronger immune system and a higher IQ. New research out of New Zealand indicates that journaling may also help wounds heal faster.

“I envy people who can disconnect from their devices.”



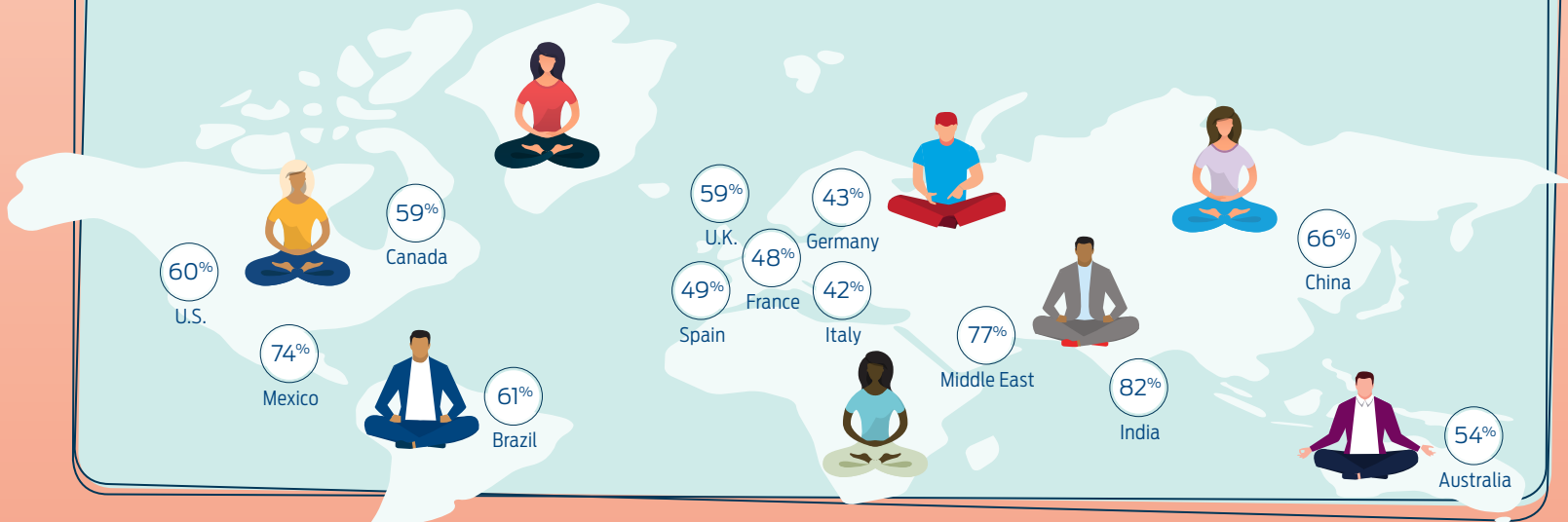
45%
agree

Global average, all adults

In Canada, the Montreal Museum of Fine Art partnered with a doctors' organization to let doctors write prescriptions that give patients free admission to museums. The doctors cited the ability of art to improve patients' moods and take their minds off serious illnesses.

“I have tried meditating.”

Percent of Gen Z and Millennials who agree



Of the 36 percent of Gen Z and Millennials globally who said they have not tried meditating,

54% agreed that they should try meditating.

According to the Global Wellness Institute, wellness tourism grew at twice the rate of overall tourism between 2015 and 2017. While the U.S. is the top destination, wellness tourism markets are growing considerably around the world. Slovakia, Philippines, Chile and Malaysia top the charts for annual growth.

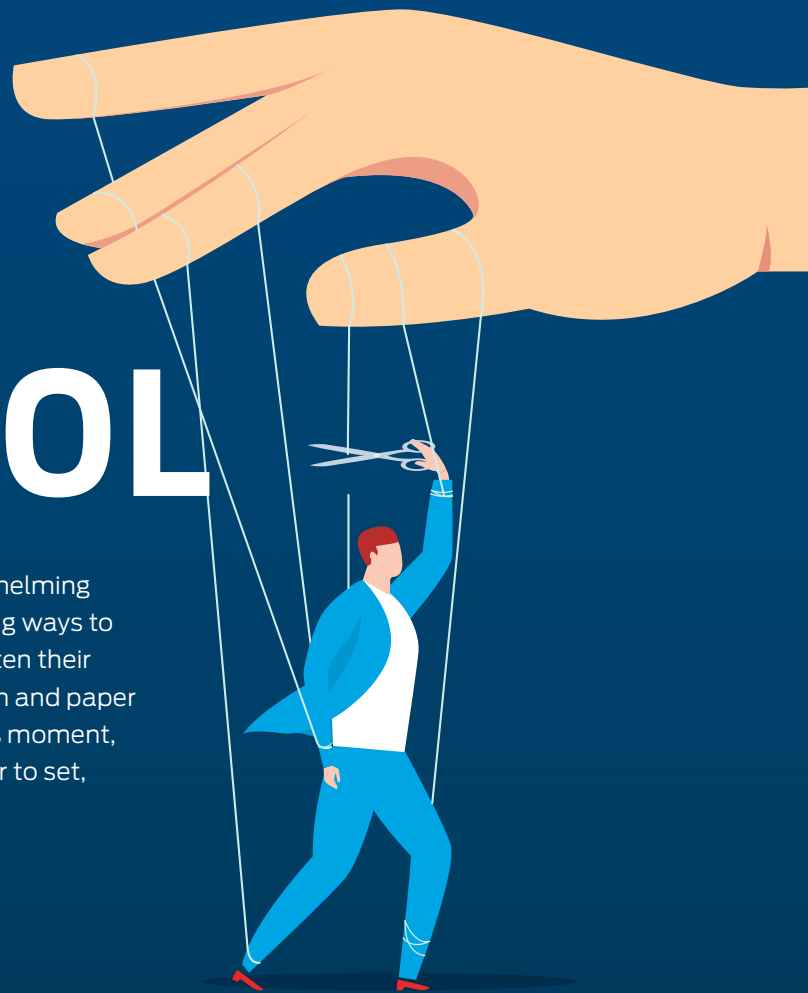



OUR TAKE

At Ford, we are studying effects of high-performance race car driving on the brain — and applying those learnings to better understand how everyday drivers can boost their mood, reduce stress and find joy behind the wheel. Our preliminary research on “buzz moments” — the thrills that play a vital role in our overall wellness — reveals that driving a sports car on a daily basis can boost your sense of well-being and emotional fulfilment. Working with neuroscientists and designers, we created the Ford Performance Buzz Car, using wearable technology and artificial intelligence to display the driver’s emotions in real-time. We took the Buzz Car to everyday drivers, and found that driving a high-performance car is even more exhilarating than kissing or watching a football game.

RECLAIMING CONTROL

Finding control in a world that's often chaotic and overwhelming is a daunting task. Yet across the globe, people are finding ways to empower themselves, change their behaviors and heighten their sensory experiences, whether through old-fashioned pen and paper or new technology. Today, self-improvement is having its moment, driven in part by a growing set of tools that make it easier to set, track, and achieve even the most ambitious of goals.





With the Internet of Skills, humans can interact in real-time over great distances and have sensory experiences that feel local. Advancements in 3D video capturing and rendering, spatial microphones and vision-based sensors enable natural communications like gestures – helping us feel more in control, no matter where we are.

“In the past year, I have taken small steps to improve my life.”


84%
agree

Global average,
all adults

Of those, 92% say they are still following through with these steps

At Dominican University in California, researchers ran a study on goal-setting that found that more than 70 percent of the participants who sent weekly updates to a friend reported successful goal achievement — meaning they either completely accomplished their goal or were more than halfway there — compared to 35 percent of those who kept their goals to themselves, without writing them down.

New research from Brown University and the BrainGate consortium shows that new technology can enable people with paralysis to directly operate a tablet device using their mind only. By using a brain-computer interface that recorded neural activity, participants were able to navigate common tablet programs like email, chat, music-streaming and video-sharing apps. They also surfed the web, checked the weather and shopped online, all by thinking about the cursor movements and clicks.



“I believe I can train my brain to think differently.”

“I believe technology can train my brain to think differently.”

81%	Australia	62%
89%	Brazil	70%
84%	Canada	70%
88%	China	82%
74%	France	68%
67%	Germany	49%
91%	India	74%
85%	Italy	69%
92%	Mexico	61%
89%	Middle East	81%
80%	Spain	60%
77%	U.K.	57%
84%	U.S.	66%

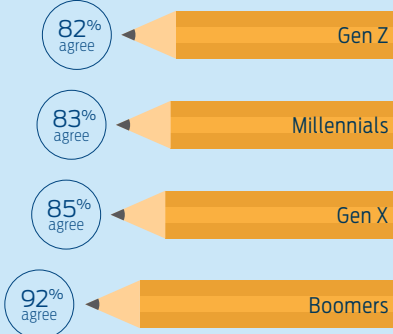
Percent of adults who agree

“Change is less intimidating when I break it into small steps.”



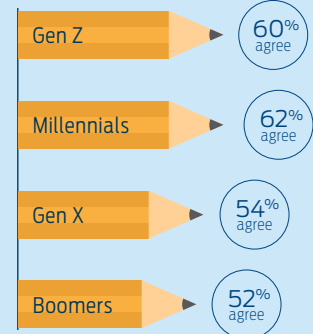
83%
agree

Global average,
all adults



Global average among those who say they have written down their goals in the past year.

“In the past year, I’ve made progress on my goals.”



Global average among those who say they have not written down their goals in the past year.

OUR TAKE

As part of our human-centered design process, we conduct empathy research to better understand people’s needs and habits — so we can ultimately design vehicles and tools that help them feel more in control. To date, we’ve developed an advanced suite of driver-assist technology — Ford Co-Pilot360™, which helps warn drivers of other vehicles in their blind spots, see what’s behind them while reversing, and even automatically brake for other vehicles or pedestrians. This technology helps reduce stress and instill driver confidence. New innovations in our 2019 Edge help drivers stay in the middle of the lane, thereby reducing the need for frequent steering corrections that may contribute to fatigue and stress. The new Edge’s available all-wheel-drive technology can also detect various driving conditions and automatically shift between two-wheel and all-wheel drive — providing all-wheel-drive traction when it’s needed, and helping reduce fuel consumption when it’s not.

MANY FACES OF ME

Identity is not a fixed thing. There are many variables that influence how we see ourselves, how we think about our role in the world, and how we behave. Identity includes what we buy, wear and drive, and what we choose to show on social media — which has become not just a platform to express ourselves, but also a way to define ourselves. And yet, if you post it, is it true? How big is the gap between our public and private images?



“I’m more outgoing on social media than I am in person.”



Gen Z



Millennials



Gen X



Boomers

Global average



According to a study by the media firm MediaCom, teens in the U.K. often switch social media platforms based on who they're talking to and what they're sharing. Instagram is teens' preferred social media site for expressing their true self, per the study, while Snapchat is the main platform to share key moments. 58 percent use Facebook as a way to interact with family.

According to a study by AwesomenessTV, 69 percent of U.S. Gen Z teens say they show their true selves on social media, 61 percent try to present the best possible version of their lives on social media, and 58 percent say it's easier to be themselves online than it is in the real world.



Global average, Gen Z

“People are fighting to stay relevant.”



Global average,
all adults

“People paint a better picture of themselves on social media than they do in reality.”



In the U.S., a study from the marketing agency Hill Holiday shows that 41 percent of 18- to 24-year-olds say social media makes them feel sad, anxious or depressed — yet 77 percent say these accounts provide more benefits than drawbacks.

“I think people are becoming more truthful on social media.”



OUR TAKE

The choice of vehicle — or the choice to have no vehicle at all — is deeply rooted in one’s identity. Ford vehicles are designed to speak to individuals’ needs — and reinforce and project their sense of self. The Ford Mustang continues to be the best-selling two-door sports coupe in the world because it delivers both performance and personality. Our iconic Ford Ranger is returning with new technology and a new look. And in 2020, we will bring back our iconic Ford Bronco, a leader in 4x4 vehicles from the mid-1960s through the mid-1990s.

LIFE'S WORK

The way we compartmentalize work has changed, and in the race for talent, companies are increasingly acknowledging a fundamental truth — employees don't live to work, they work to live. For those in higher income jobs, working to live is showing up in new ways — more creative benefits, the freedom to take sabbaticals and extended leave, pursuits of mental enrichment and more. For those in lower income jobs, working to live can still be a struggle to get by, but companies are stepping up to expand their benefits to hourly and part-time workers — and they're finding that what's good for workers can also be good for business.



In the U.K., one in three sick notes handed out by general practitioners are for those with mental health problems like stress, anxiety and depression, according to Britain's National Health Service.

According to a survey by Simplii Financial, two-thirds of Canadians have thought about quitting their jobs and taking a life sabbatical, and one in four are already saving up for it. 36 percent said they would use the opportunity to start a business, and 34 percent said they'd use the time to live or work in a different country.

In India, the software services company Infosys has a sabbatical policy that encourages employees to take leave for up to a year to work on community development projects, while receiving 50 percent of their salary.

84%
agree

“Companies should offer mental health days as part of their benefits.”

Global average, all adults



75%
agree

Global average, Gen Z

“The world would be a better place if people were required to periodically spend a few months living in a different culture.”



77%
agree

“Companies don’t do enough to accommodate the needs of working parents.”

Global average, all adults



“Companies should reward employees for using all of their vacation time.”

66%

Gen Z

72%

Millennials

67%

Gen X

61%

Boomers

Percent globally who agree



In the U.S., the MIT Media Lab is creating a desk that reads more than 30 biological signals — such as facial expressions, heart rate, body temperature and posture — and adapts lighting, images and sound to lower stress and improve workers' moods. Called Mediated Atmosphere, the project is rooted in psychological studies about how space impacts productivity.



84%
agree

“Diverse opinions lead to positive change.”

Global average, all adults

OUR TAKE

Ford believes that talent is strengthened when people are encouraged to experience the world around them and give back to their communities. One way we emphasize this is through our Thirty Under 30 program, which empowers young employees to work with philanthropic organizations, while developing skills through a unique design thinking curriculum. Each class is made up of 30 diverse U.S. Ford employees, all under the age of 30, selected from applicants across the country — including engineers, financial, marketing and IT professionals. Over the course of a year, they take time away from their jobs to learn how charities are run and how to develop strategies for nonprofits to connect with future donors and volunteers. This year's Thirty Under 30 fellows will focus on the critical issues of housing, homelessness and shelter.

ECO- MOMENTUM



Consumers overwhelmingly agree that environmental progress will depend on changes in human behavior, yet that awareness doesn't always translate to action. Changing lifelong habits is hard, and many are looking for guidance on how and where to decrease their environmental footprint — recognizing that it may be the small changes that help make the biggest difference.

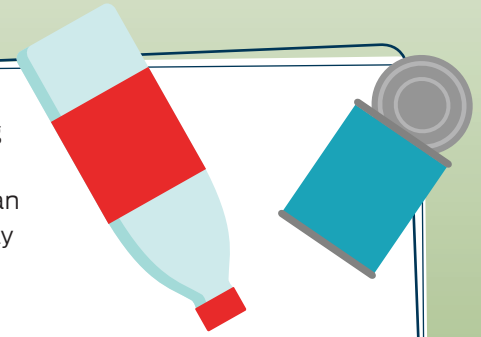


“I would change the way I eat if I thought it could help the planet.”

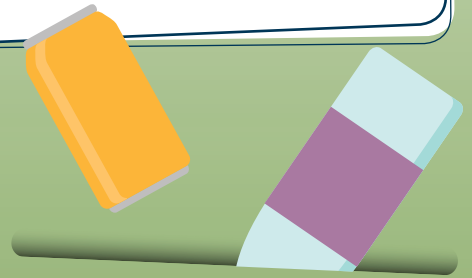
Australia	60%
Brazil	82%
Canada	66%
China	84%
France	75%
Germany	63%
India	83%
Italy	83%
Mexico	81%
Middle East	79%
Spain	77%
U.K.	62%
U.S.	56%

Percent of adults who agree

Istanbul’s metro stations are installing “reverse vending machines” that treat recyclables as currency. Passengers can add credit to their subway cards simply by feeding aluminum cans and plastic bottles into the machines, which then crush, shred and sort the material.



By 2030, one third of vehicles around the world will be plug in or all-electric, and another third will be hybrid.



As part of a mission to reduce their environmental footprint and water consumption, four cities in Brazil have pledged to make all meals served in public school cafeterias 100 percent plant-based by the end of 2019.

According to data and analytics firm GlobalData, 70 percent of the world's population is reducing meat consumption or cutting it out entirely, a shift driven largely by Millennials, who are most likely to consider the source and environmental impacts of their food purchases.

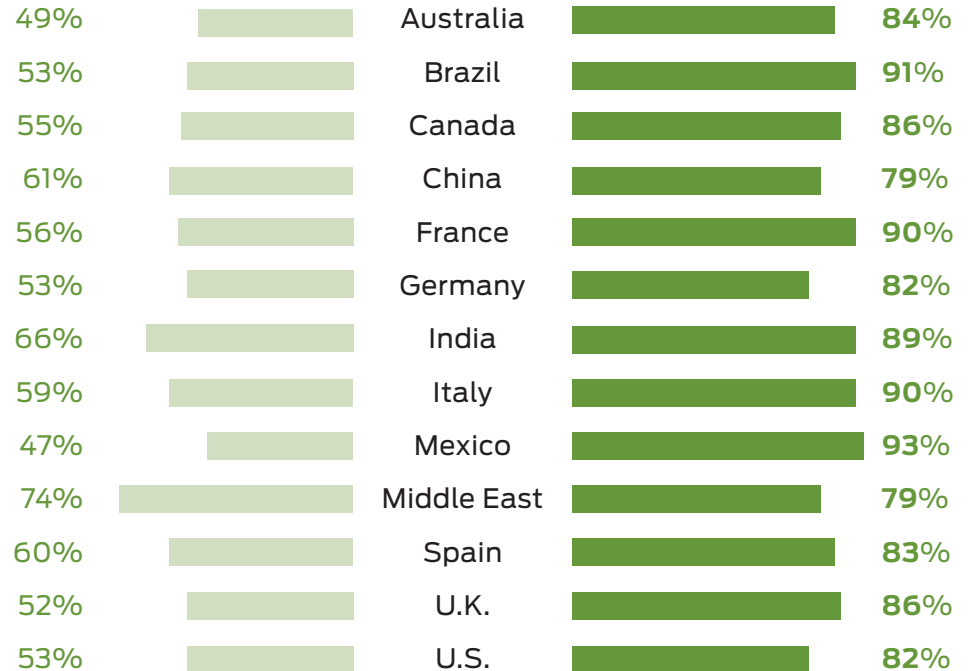
At Nada, a grocery store in Vancouver, British Columbia, everything is sold package-free — including toothpaste. Customers bring their own containers, buy reusable ones at the store or borrow from a stack that has been cleaned and sanitized. The containers are weighed and tagged before customers begin shopping.



“Environmental progress will depend on technology.”



“Environmental progress will depend more on changes in human behavior than on technology.”



Percent of adults who agree

“When I make a purchase, I often consider its environmental costs.”



Percent of adults who agree

OUR TAKE

Sustainable innovation is critical to the health of the environment, as well as the success of our business. Being a responsible company is in Ford's DNA, and our actions demonstrate our values in pursuit to be the world's most trusted company. We embrace cutting-edge practices on the use of sustainable and repurposed materials — including experimenting with renewable materials such as bamboo, tree waste, tomato stems and agave fibers as better replacements for traditional plastic vehicle parts. Thinking responsibly around renewable resources also extends to exploring new propulsion systems that push the boundaries of sustainability. As countries from France to China announce regulations that limit internal combustion engines, Ford plans to roll out 16 fully electric vehicles by the end of 2022, including a Mustang-inspired, all-electric performance crossover vehicle. From our vehicles to how we source our parts, sustainability is driving how we do business.

EASY STREET

Transportation is changing in mind-bending ways — and with remarkable behavioral shifts. Technology is driving us to move faster, further and differently, and as our commutes change, so does our ability to get stuff done. The mobility journey isn't about simply going from A to B, it's about what we do with our time along the way.



“Technology is making commuting less stressful.”

67%
agree

Global average, all adults

On average, Americans spend more time in their cars than they receive in vacation time, according to the technology research firm Arity. Americans spend an average of 321 hours in the car each year, mostly commuting to and from work, and receive an average of 120 hours of vacation.



“Self-driving cars and shared ride services will reduce the desire for private parking spaces.”

69%
agree

Global average, all adults

“I believe self-driving cars will drive more safely than human drivers.”

Percent of adults who agree

Australia	46%
Brazil	55%
Canada	46%
China	56%
France	49%
Germany	42%
India	64%
Italy	49%
Mexico	58%
Middle East	64%
Spain	49%
U.K.	43%
U.S.	43%

67%
agree

“I’d rather my children ride in a self-driving vehicle than ride with a stranger.”

Global average, all adults



E-bikes are gaining popularity around the world. In France, e-bike sales grew 50 percent in 2017, due in part to government incentives. In Italy, e-bike sales grew 25 percent, and in Germany, sales grew 19 percent.



“One of the biggest benefits of autonomous vehicles will be having more free time.”

71%

Gen Z

72%

Millennials

64%

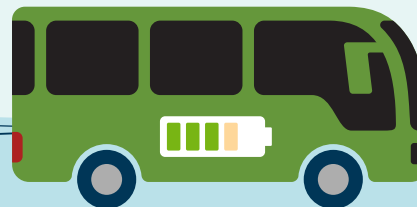
Gen X

51%

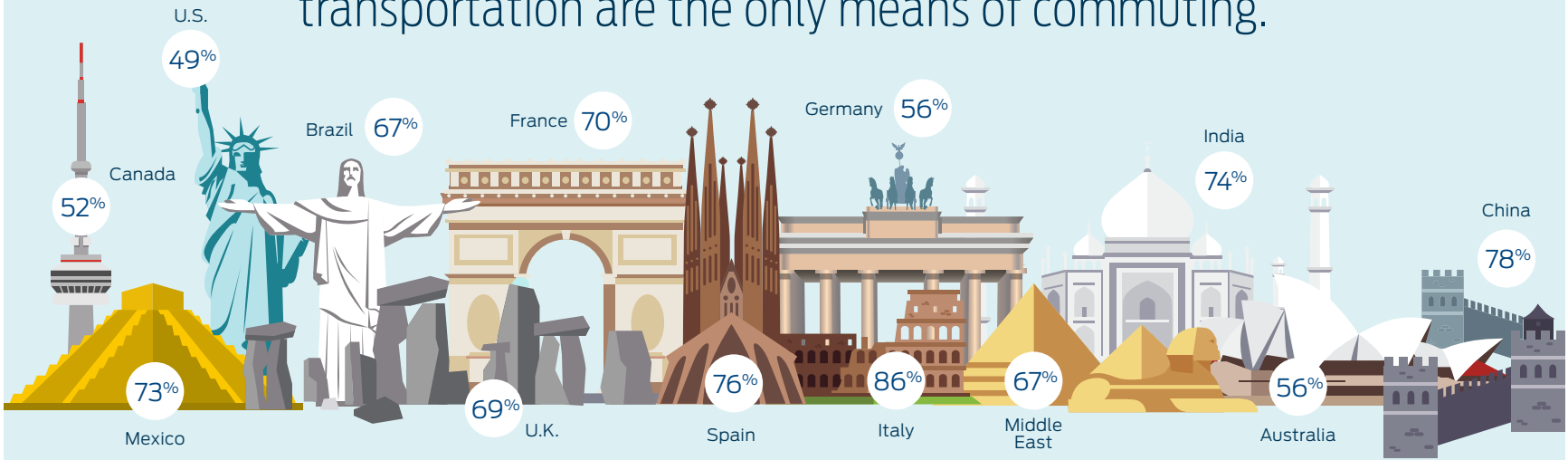
Boomers

Percent globally who agree

Every five weeks, Chinese cities add 9,500 electric buses — the equivalent of London’s entire working fleet, according to Bloomberg New Energy Finance. If that rate of growth continues, roughly half the world’s buses will be battery-powered by 2025.



“I’d love to see a city where biking, walking and public transportation are the only means of commuting.”



OUR TAKE

Ford is actively exploring the impact and applications of self-driving vehicles. In Miami, we are developing self-driving technology to be applied for ride hailing and goods delivery services. We are exploring ways to make the self-driving experience feel welcoming and comforting to help earn people’s trust. Our research shows that people enjoy getting audio cues from self-driving vehicles, so we’ve programmed some of our vehicles to greet the rider by saying “Hola! Jump in and relax. Leave the driving to me.” To help riders feel more confident in the technology, we’re testing a built-in screen in the interior that shows what the vehicle sees through its various sensors — like moving cars, pedestrians, parked vehicles and more. We’re experimenting with businesses, too — this fall, we announced a pilot program with Walmart and Postmates to explore how our self-driving vehicles can complement home delivery of groceries. We’re also investing in multimodal journeys, recognizing that people use multiple forms of transportation during a single trip. In November, we purchased Spin, a San Francisco-based electric-scooter-sharing company, to provide more nimble solutions for commuters.

FORD TRENDS 2019 SURVEY – METHOD SUMMARY

The results for Ford Trends 2019 are based on 13,012 online interviews across 14 countries, conducted under the direction of Harris insights & Analytics. The survey was conducted among the general population, ages 18 years and older in the following countries: Australia, Brazil, Canada, China, France, Germany, India, Italy, Mexico, Saudi Arabia, Spain, United Arab Emirates, the United Kingdom and the United States. Respondents from Saudi Arabia and United Arab Emirates were required to be nationals of their respective countries; data from these two countries were combined and analyzed in aggregate. All fieldwork took place between October 29 and November 6, 2018.

While the data within countries were weighted to be representative, the overall sample of 13,012 was not weighted across countries. That is, we do not claim that aggregated data is representative based on country population sizes across the participating countries.

Country		Sample Size
Australia		1,000
Brazil		1,001
Canada		1,000
China		1,002
France		1,001
Germany		1,000
India		1,000
Italy		1,003
Mexico		1,000
Spain		1,000
Middle East (nationals only)	Saudi Arabia	500
	UAE	504
United Kingdom		1,001
United States		1,000
Total		13,012

SOURCES

Examples for **The Tech Divide** were gathered from the following sources:

- “Dubai Wants to DNA Test Its Millions of Residents to Prevent Genetic Disease,” [smithsonian.com](#), Mar. 2, 2018
- “A Robotic Fix for Heart Failure,” *Harvard Magazine*, Jan. 18, 2017
- “The Amazing Ways Google Uses Artificial Intelligence And Satellite Data To Prevent Illegal Fishing,” [Forbes.com](#), Apr. 9, 2018
- “Inside China’s Dystopian Dreams: A.I., Shame and Lots of Cameras,” *New York Times*, July 8, 2018
- “Aging Japan: Robots may have role in future of elder care,” [Reuters.com](#), Mar. 27, 2018

Examples for **Digital Detox** were gathered from the following sources:

- “Doctors can soon prescribe visits to Montreal Museum of Fine Arts,” *Montreal Gazette*, Oct. 11, 2018
- “Yelp for noise,” *New Yorker*, Sept. 24, 2018
- “The puzzling way that writing heals the body,” *BBC Future*, June 2, 2017
- “New Study Reveals Wellness Tourism Now a \$639 Billion Market—to Reach \$919 Billion by 2022,” *Global Wellness Institute*, Nov. 6, 2018

Examples for **Reclaiming Control** were gathered from the following sources:

- “Study focuses on strategies for achieving goals, resolutions,” *Dominican University of California*
- “Five technology trends augmenting the connected society,” [Ericsson.com](#), 2018
- “Brain-computer interface enables people with paralysis to control tablet devices,” *ScienceDaily*, Nov. 21, 2018

Examples for **Many Faces of Me** were gathered from the following sources:

- “Teenagers show ‘true self’ on Instagram,” *MediaCom*, Sept. 18, 2017
- “Gen Z: the audience you can’t ignore,” *Awesomeness*, May 2017
- “Gen Z: the social generation,” *Hill Holiday*, Mar. 2018

Examples for **Life’s Work** were gathered from the following sources:

- “One in three ‘sick notes’ for mental health, says NHS,” *BBC News*, Sept. 1, 2017
- “Sabbatical top of mind for most Canadians — especially millennials — but they lack financial plan,” *Financial Post*, Nov. 15, 2018
- “Work sabbaticals are no longer taboo,” *Fortune India*, Jan. 27, 2018
- “Smart office enables a personalized workplace atmosphere,” *MIT News*, July 13, 2018

Examples for **Eco-momentum** were gathered from the following sources:

- “Istanbul Vending Machines Offer Subway Credit for Recycled Bottles and Cans,” *New York Times*, Oct. 17, 2018
- “Brazilian School Districts Make Historic Switch to 100% Plant-Based Meals,” *EcoWatch*, Mar. 26, 2018
- “Millennials Are Driving The Worldwide Shift Away From Meat,” [Forbes.com](#), Mar. 23, 2018
- “The rise of the plastic-free, zero-waste grocery store,” *Mic*, July 2, 2018

Examples for **Easy Street** were gathered from the following sources:

- “Has the love affair with driving gotten stuck in traffic?” *Washington Post*, Nov. 7, 2018
- “Electric Buses Are Hurting the Oil Industry,” *Bloomberg*, Apr. 23, 2018
- “E-Bike Sales Soared in EU’s Main Markets,” *Bike Europe*, Mar. 29, 2018

Special thanks to all those who helped shape these trends:

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