

A map of Canada with the province of British Columbia highlighted in red. The rest of the country is shown in light yellow, and the surrounding oceans and seas are light blue. The title text is overlaid on the map.

Cash on the Hood: the B.C. Experience



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Canadian Provinces with EV Incentives



	British Columbia	Ontario	Quebec
Population (1,000,000's)	4.6	13.6	8.2
Population as % of Canada	13%	38%	23%
Maximum Incentives (slightly simplified)			
up to Feb 2014	\$5000	\$8500 + HOV	\$8000 + HOV
Mar 2014 – Mar 2015	0	\$8500 + HOV	\$8000 + HOV
Apr 2015 – Feb 2016	\$5000	\$8500 + HOV	\$8000 + HOV
Mar 2016 – present	\$5000 + HOV	\$14,000 + HOV	\$8000 + HOV

BC's revised incentives do not apply to vehicles with \$77,000+ MSRP.

Ontario's revised incentives capped at \$3,000 for vehicles with \$75,000+ MSRP, and do not apply for vehicles with \$150,000+ MSRP.

Impact of \$5000 rebate



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Impact of HOV access (late 2016)



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Canada's best-selling plug-ins

	Cumulative Registrations (through May 31, 2016)	Market Share
Chevy Volt	6,645	31%
Tesla Model S	4,229	20%
Nissan Leaf	4,012	19%
Smart ED	1,136	5%
All others	5,400 (est)	25%

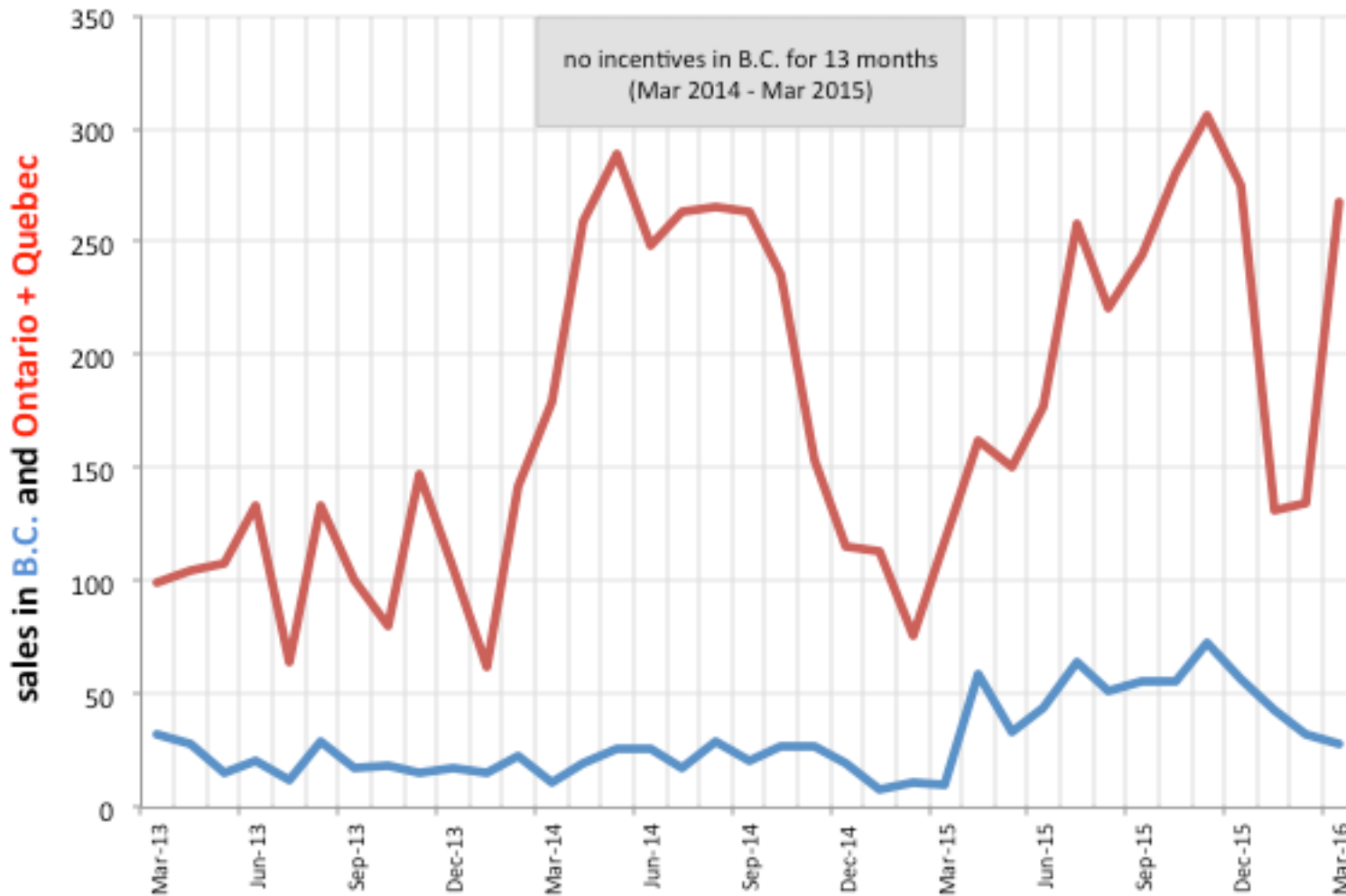
Method:

Focus on Volt, S and Leaf: 70% of market.

Smart ED purchasers probably not representative of broader market.

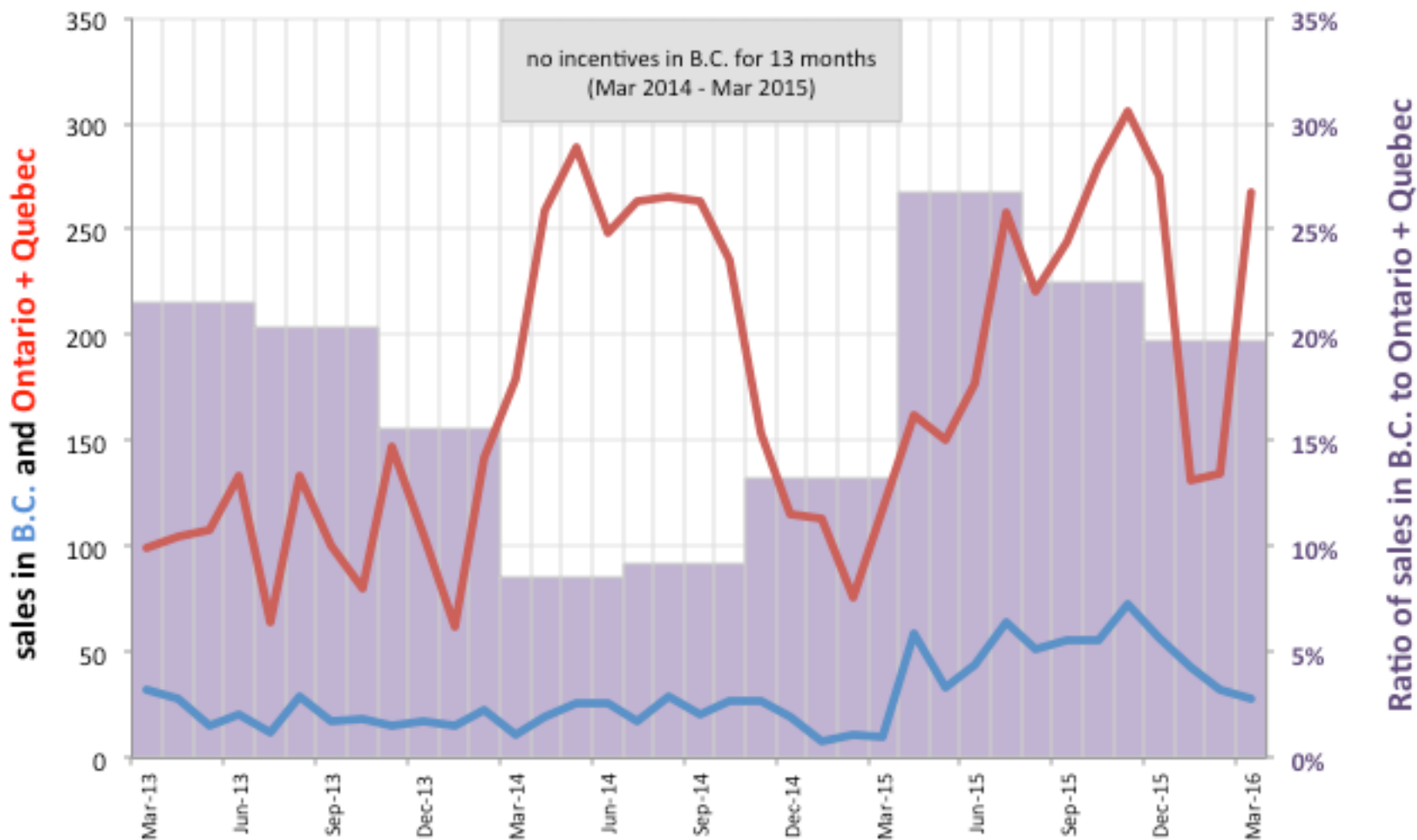
Trends hard to see in raw sales data...

Effect of plug-in electric vehicle purchase incentives on (Leaf + Volt) sales in B.C. compared to Ontario and Quebec



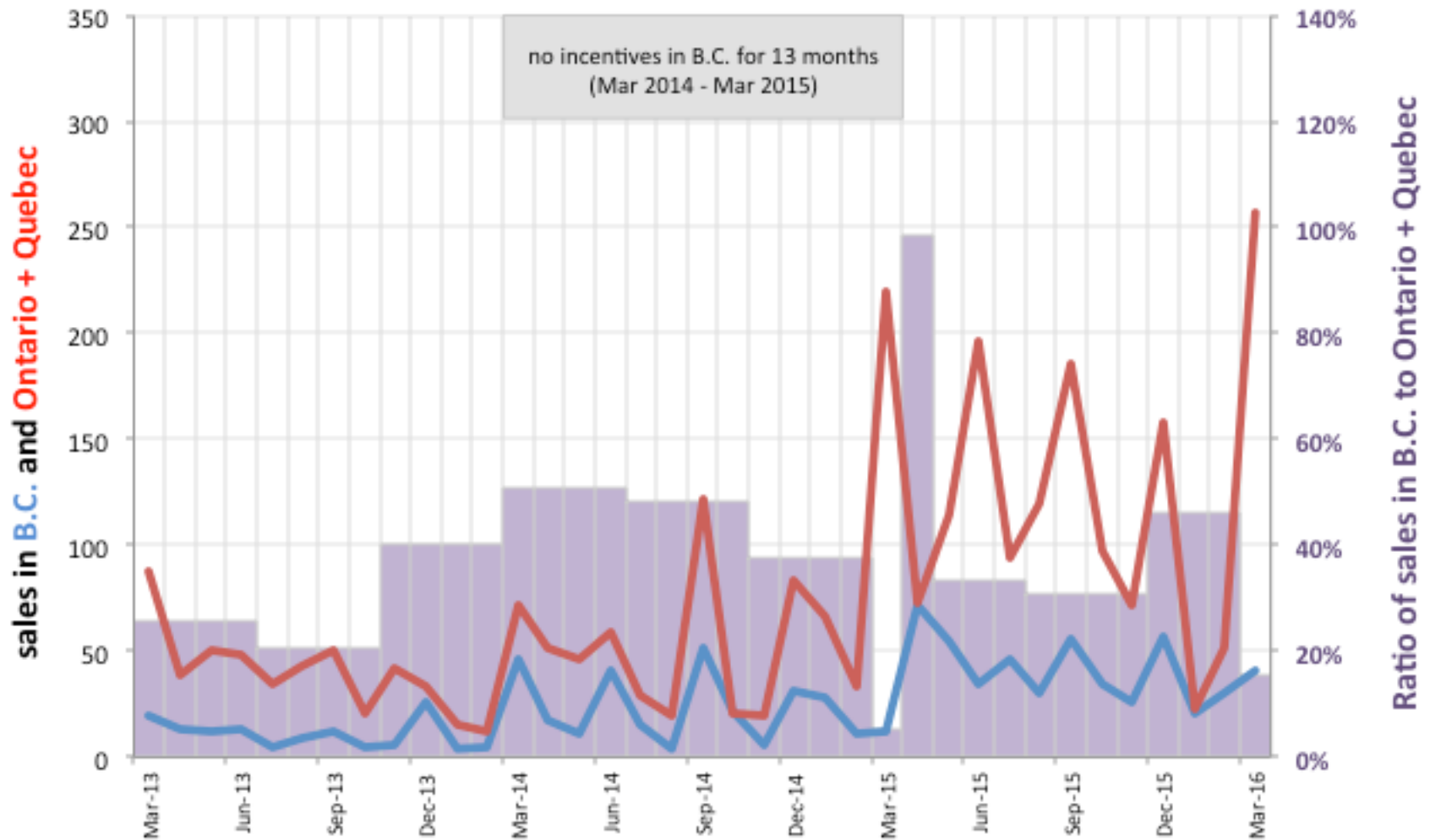
...but using ratios helps

Effect of plug-in electric vehicle purchase incentives on (Leaf + Volt) sales in B.C. compared to Ontario and Quebec



Incentives didn't impact Tesla sales ratio

Effect of plug-in electric vehicle purchase incentives on Tesla Model S sales in B.C. compared to Ontario and Quebec



Incentives' impact on sales ratios

Ratio of B.C. sales to (Ontario + Quebec) sales

	Volt*	Leaf	V + L	Tesla
Mar '13 – Feb '14 \$5000 BC incentive	9% (30%)	45%	19%	27%
Mar '14 – Mar '15 no BC incentive	4% (19%)	19%	10%	35%
Apr '15 – Mar '16 \$5000 BC incentive	7% (32%)	49%	23%	33%
Apr '16 – Ontario \$8500 → \$14000 BC adds HOV access	<i>coming soon to GreenCarReports.com</i> 😊			

Volt data in () represents BC to ON sales ratio.

Sales success of Bourgeois Chevrolet in Quebec distorts the ratios.

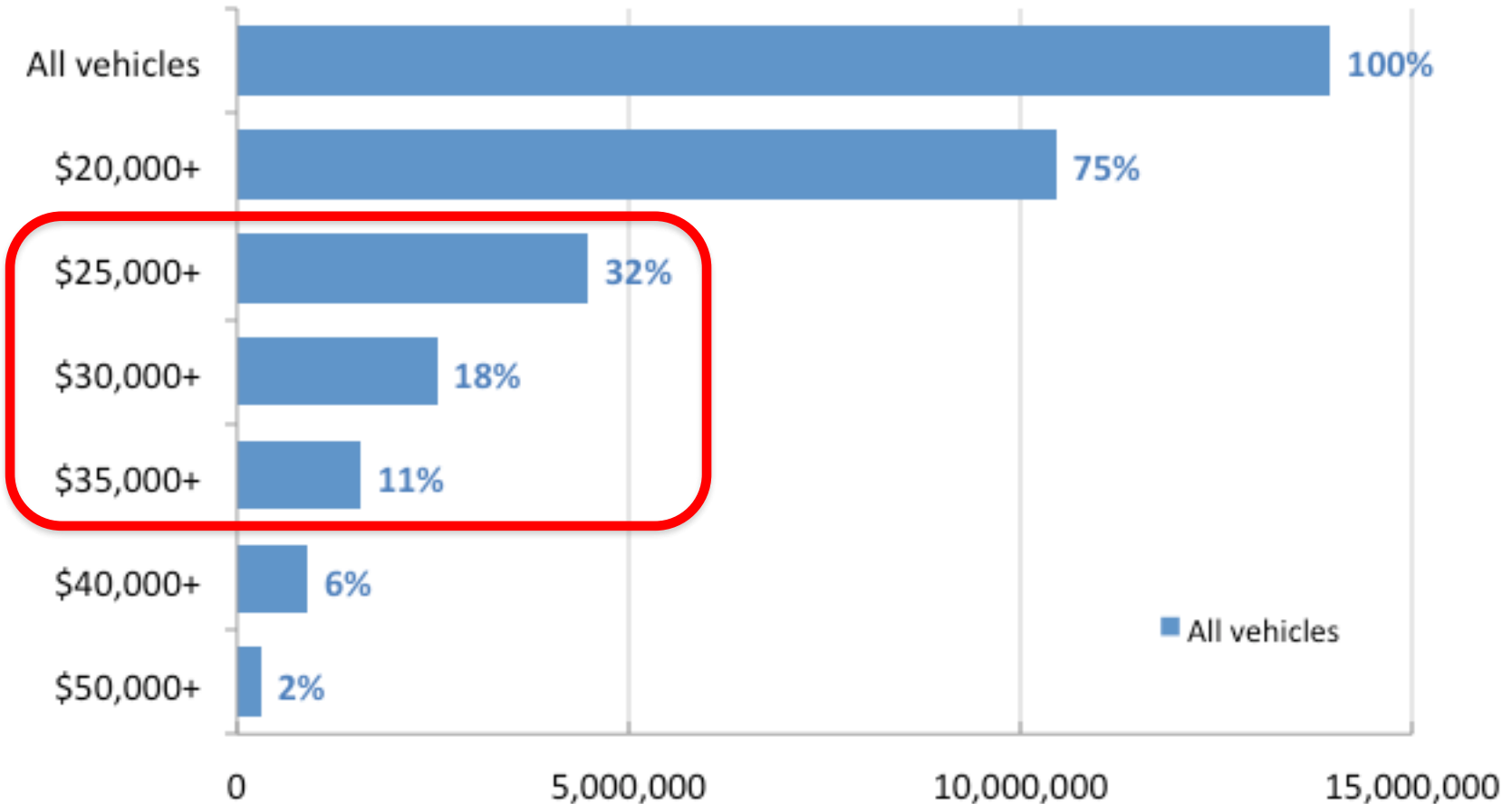
BC experience in a nutshell

- \$5000 rebate gone = half the **expected proportion** of Volt, Leaf sales
- rebate returns = back to “normal”
- **Tesla sales ratios unaffected**
(BMW i3 ratios also unaffected)

Why the price sensitivity?

U.S. New Car Market Size by base-model MSRP Jan-Nov 2013

Entry-level MSRP calculated for 268 vehicles
(commercial vehicles excluded).



References / further reading



Canadian sales stats: www.tinyurl.com/CanadaEVSales

Impact of BC incentives disappearing / reappearing:

http://www.greencarreports.com/news/1094468_when-electric-car-incentives-expire-a-case-study-in-canada

http://www.greencarreports.com/news/1102023_when-electric-car-incentives-return-british-columbia-case-study

Best practices for selling EVs:

http://www.greencarreports.com/news/1098599_high-volume-chevy-volt-dealer-how-to-sell-successfully-lessons-learned

Academic study of Canadian plug-in and “regular vehicle” purchasers:

http://www.greencarreports.com/news/1099194_canadian-plug-in-electric-vehicle-study-1-percent-to-30-percent-is-the-challenge

Article archive at GreenCarReports:

http://www.greencarreports.com/writer/10039832_matthew-klippenstein