

KEY INSIGHTS ABOUT

# Electric Vehicle Consumer Preferences in Metro Vancouver

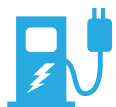
In 2017, researchers at Simon Fraser University’s Sustainable Transportation Action Research Team (SFU START) conducted a **Canadian Zero Emissions Vehicle Survey** in Metro Vancouver. This survey built upon a 2013 consumer survey.

## Evolving awareness of Electric Vehicle technology in Metro Vancouver

As part of the 2017 study, we commissioned a comparison of the results from 2013. What we found was that overall awareness of EV technology is increasing, but there are still some knowledge gaps.



**More awareness of EVs:** More respondents have heard of common Electric Vehicle (EV) models (e.g. Toyota Prius, Chevrolet Volt and Nissan Leaf) in 2017 than in 2013. In 2017, 81%-89% of Mainstream respondents had heard of these models, whereas in 2013 only 49%-69% had heard of them.



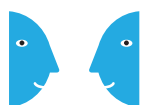
**More awareness of EV chargers:** In 2013, 36% of respondents in Metro Vancouver reported awareness of at least one public EV charger and 9% were aware of two or more. In 2017, these numbers rose to 75% and 33%. We speculate that this could be attributed to (a) an increase in the installation of chargers, (b) better understanding of what the chargers are, and (c) heightened awareness of chargers.



**Understanding of the technology remains low:** Less than one-third of Mainstream respondents knew how to fuel/charge the three most popular EVs on the road today: Nissan Leaf (29% correct), Chevrolet Volt (22% correct) and Tesla Model S (48% correct). These results are largely unchanged from 2013.



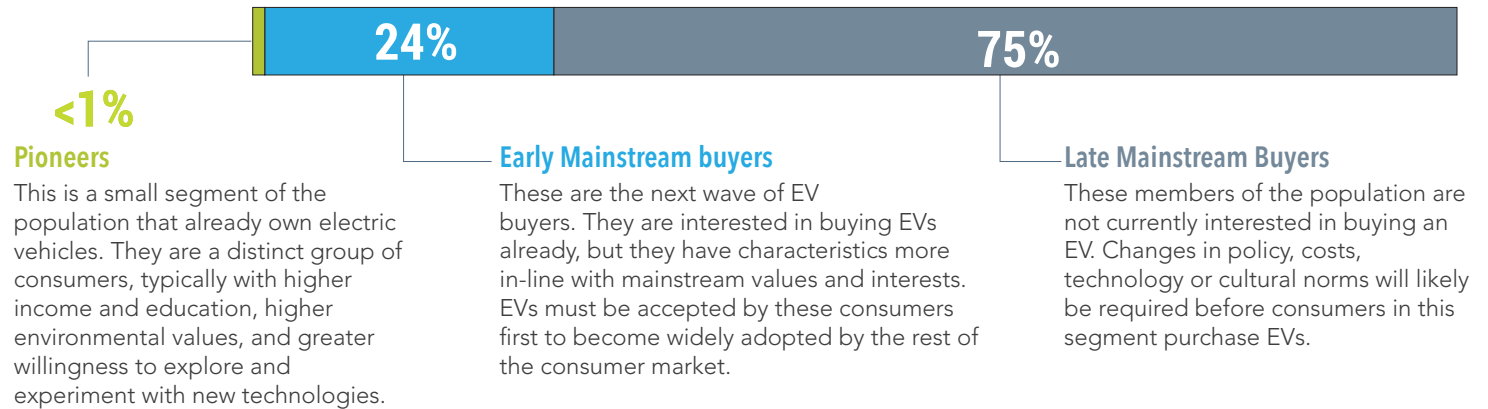
**Direct experience with EVs remains low:** In 2017, only 2-5% of Mainstream buyers have driven or been a passenger in an EV, which is roughly the same as in 2013.



**Personal research, and conversations** with family and friends ranked as some of the most important channels for information about EVs in 2017 and 2013. At the bottom of the list were car magazines, TV commercials and press releases from automakers.

## Understanding the Mainstream Market

Most people who already own an Electric Vehicle belong to a small and unique market segment we call Pioneers. Over the next few years Early Mainstream buyers will increasingly enter the EV market.



## Profiling the Next Wave of EV Buyers: Early Mainstream

