EV Ownership In CT Increases 78% in 2018

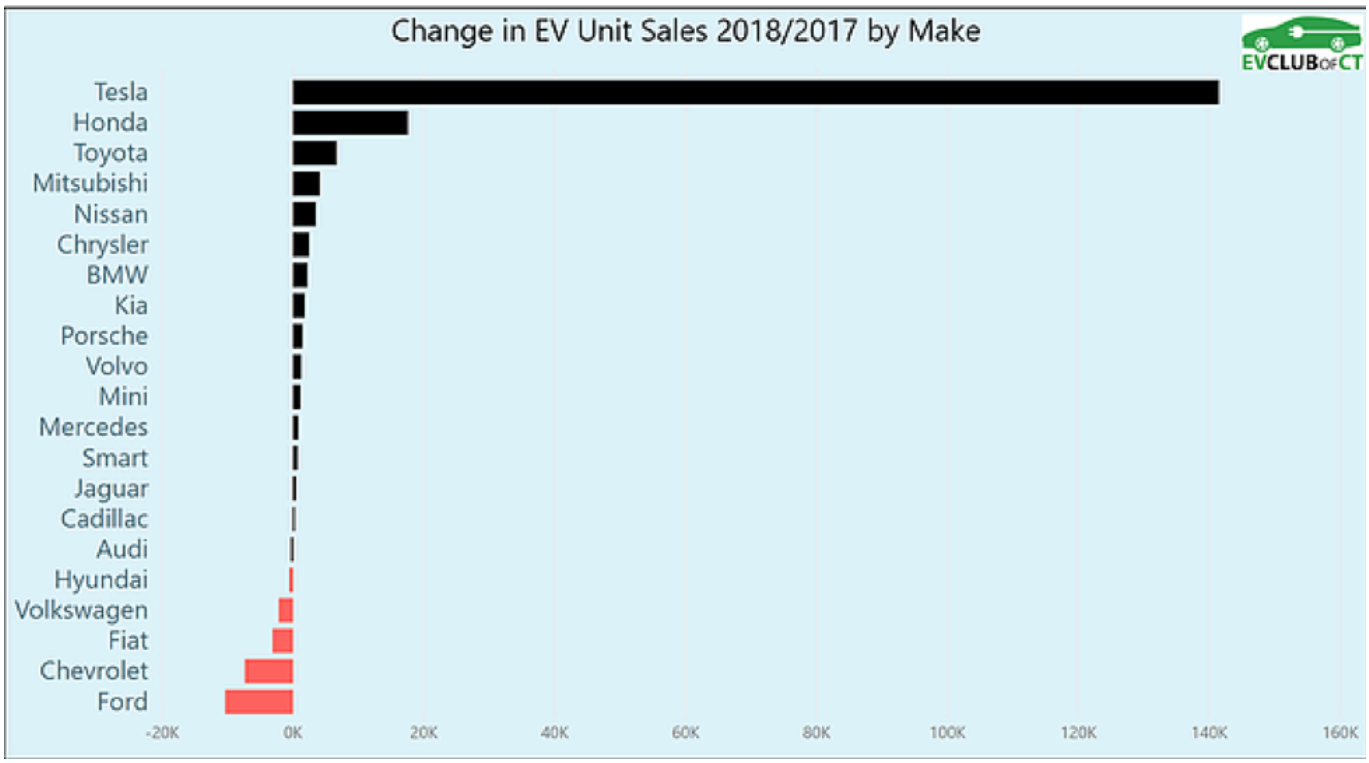
The early data are in and the number of EVs registered in CT as of December 31, 2018 has increased by 78% relative to one year ago.

We do not have much detail below this high-level information, but we know a few things and can surmise more.

The total number of EVs registered as of 12/31 is 9289, up from 5206 one year ago. There were 5063 PHEVs registered and 4208 BEVs. (This doesn’t 100% tie back due to a few outliers). The PHEV number was up 69% and the BEV number was up 91% relative to 2017.

Even though we do not have granular data, we know that 2018 was the year of the Tesla Model 3. The large increase and higher proportion of BEVs relative to past years is no doubt due to the Model 3, which has blasted through all previous EV sales records. Our opinion is that this number is also possibly a bit understated. There is a lead-lag to getting a Tesla registered in CT due to the fact that it is still not legal for Tesla to open stores in CT. Consequently, Teslas must be purchased out of state and then the registration has to be transferred. We have one member of our club who was upset that the transference did not occur until after Jan. 1, which cost him part of his tax credit. It is likely he was not alone.

Below is a chart that shows the difference in EV sales by make in 2018 relative to 2017. It is based on analysis of national data published in Inside EVs.



Our club is brand agnostic. We want to see people buy EVs and we don't care which one they choose. The change for Tesla is obviously light years ahead of every other company. But the bigger point, or question, is about the lack of traction on the part of all of the other manufacturers. It looks like they aren't really trying and we hope that can change. Almost all of them have made numerous and ambitious announcements of EVs in development. Audi has purchased a 60 second spot in the Super Bowl to advertise EVs. Based on the going rate, they will have spent over $10 million for the privilege.

The legacy automakers will argue that their inability to generate EV sales momentum is due to lack of consumer interest exacerbated by relatively low fuel prices. Tesla is demonstrating that this is not the case (and doing so with a form factor – a sedan – that has been falling out of favor with consumers).

When one sees numbers like these, and being aware of the aggressive EV adoption goals in the Multistate ZEV Action that CT has signed on to, it is hard to justify throwing up barriers that inhibit sales by Tesla or other companies which

sell direct, such as Rivian, the maker of an electric pickup.

We hope that Audi is throwing down a marker, and we hope the other companies follow through in a serious way on their EV pronouncements. In the meantime, enabling Tesla and other new EV manufacturers to open stores in CT might induce the legacy carmakers to compete in the showroom and not the legislature.

Very Few Manufacturers Account for the Vast Majority of EVs on the Road

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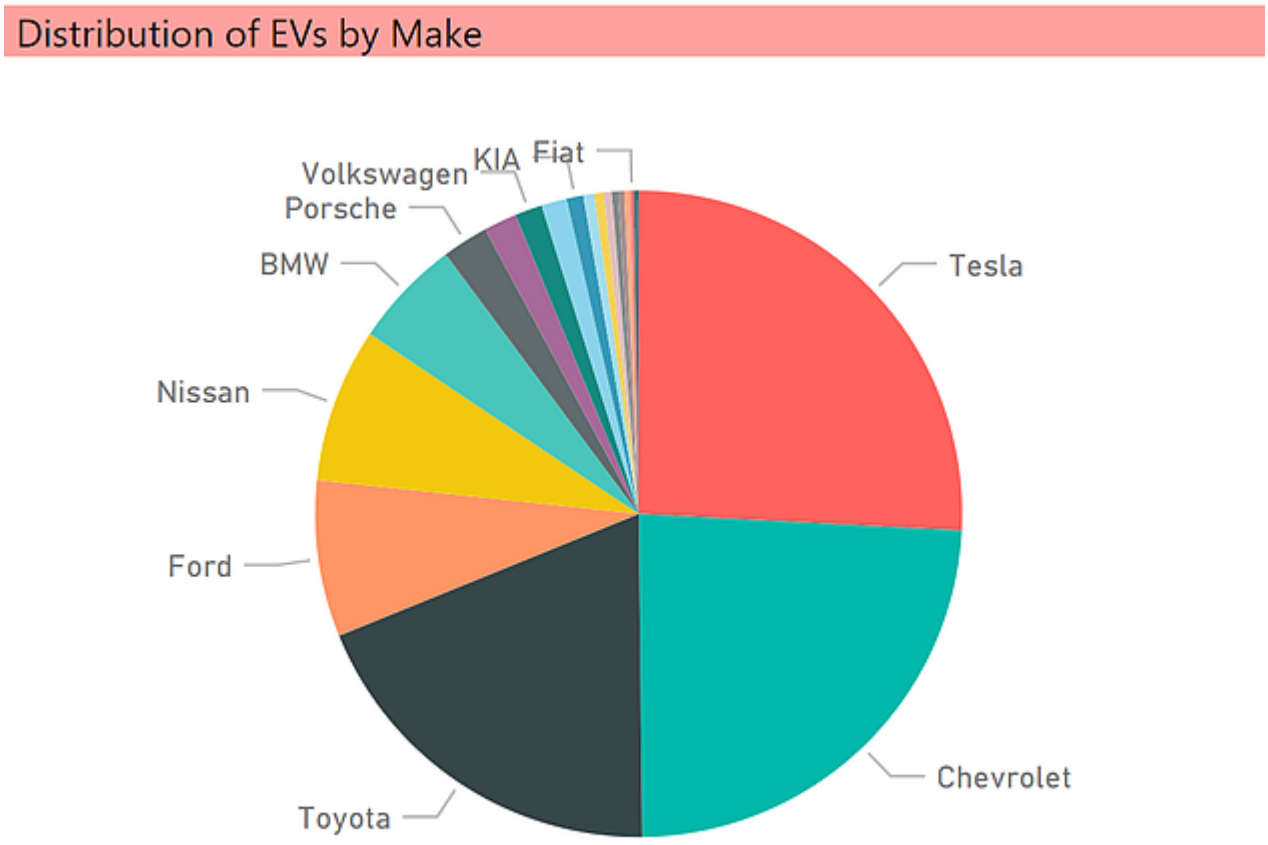
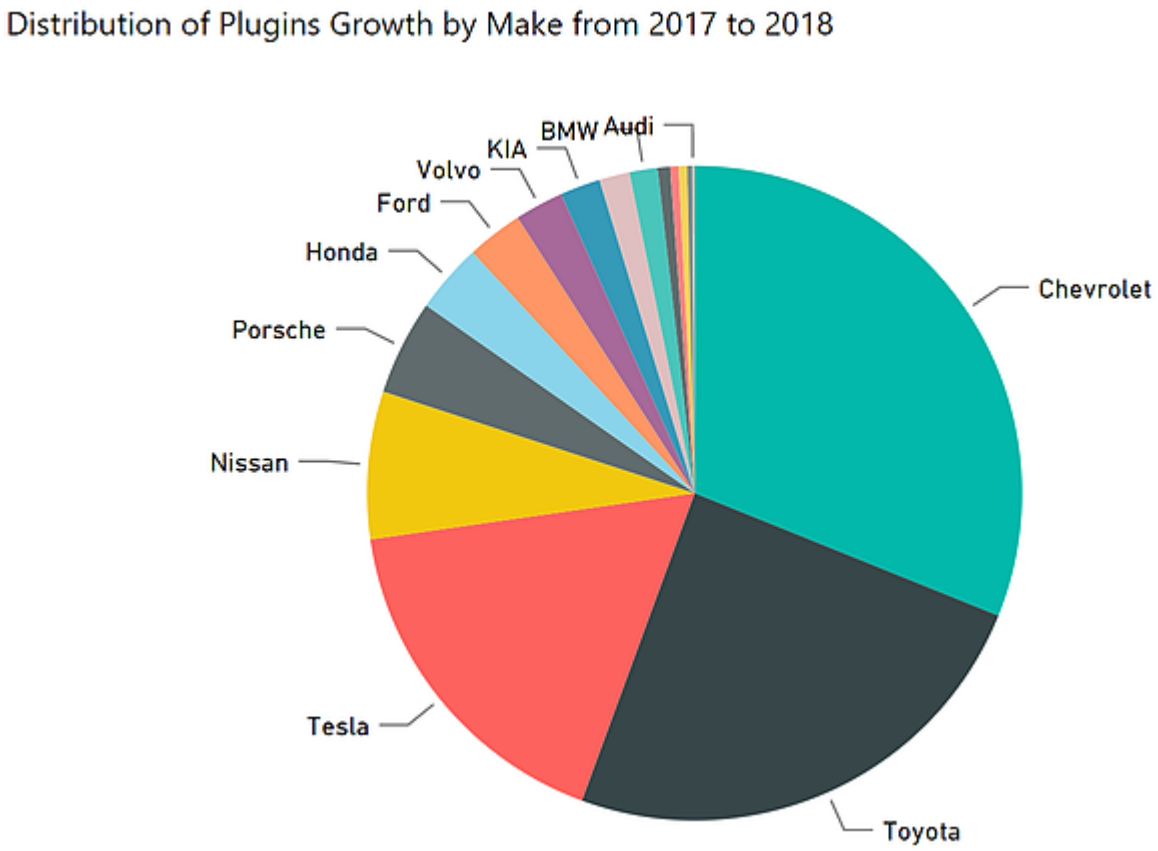
While the growth of the number of EVs registered in the state of CT was a reasonably robust 35% from 2017 to 2018, there are actually very few manufacturers that account for most of them. These data were compiled as part of the Electric Vehicle Club of CT’s annual update of data obtained via a Freedom of Information Act request of the Department of Motor Vehicles.

As illustrated by the chart below, only 3 manufacturers, Tesla, Chevrolet, and Toyota, account for 69% of all EVs registered in the state.



Plugins Growth

Tesla is the largest with 26%, followed by Chevrolet with 24%, and Toyota with 19%. Recent trends only accelerated that. The growth from 2017 to 2018 was fueled by the same 3 companies which accounted for 73% of year on year growth. If one were to add Nissan, that grows to 80%.



The growth of Chevrolet was accelerated by the introduction of the BEV Bolt, giving Chevrolet two of the top-selling EVs including the PHEV Volt.

Toyota has met with success with its Prius Prime PHEV and that catapulted them from nowhere to third among all manufacturers in vehicles registered.

The big X factor is the Tesla Model 3. When this data set was generated in early March, very few had been delivered to customers in the state. Tesla stated that they have several thousand Model 3 reservations in CT as of early this year. And in August, the Model 3 alone represented roughly half of all plug-in sales nationally according to Inside EVs. We have seen many club members take delivery of this vehicle and fully expect that it will completely upend the current picture.

Let us remind ourselves that as of this writing Tesla is still not allowed to open stores in CT. Many manufacturers have announced ambitious EV plans. We hope they follow through. Our

club is brand agnostic, but we support Tesla coming into the state. There is expected to be another attempt pass the necessary legislation to enable it when the next legislative session commences, and we ask our members and friends to reach out to their legislators to let them know there is a deep base of support for this.

EV Ownership Grows 35% in CT

35% Increase in 2017

The number of plug-in vehicles registered in CT has grown by 35.1% in a comparison of 2 data points one year apart.

The Westport Electric Car Club received an updated vehicle ownership file from the CT Department of Motor Vehicles which was obtained via a Freedom of Information Act request. This enables us to make comparisons with a similar file acquired 1 year ago. These files contain no personal data, just make, model, model year, and city.

This translates to 6264 vehicles this year compared to 4636 the prior year. The term EV includes both battery electric vehicles (BEV) and plug-in hybrid vehicles (PHEV). EVs represent .28% of all vehicles registered in the state this year, up from .20% last year. EV sales have been growing by double digit percentage increases for several years now, but when looking at a number like .28% of all vehicles, the context is that these recently manufactured EVs are in a file that contains all of the existing fleet in the state.

Keep in mind that these data points are static snapshots of vehicles registered. It is not the same as new car sales. It would include the purchase of used vehicles and it would not include vehicles that were sold or had a lease expiry. Broadly speaking, since they aren't the same numbers, this 35% increase compares with a 26% increase in the sales of new EVs nationally in 2017 vs. 2016. As this post is being written the March 2018 EV sales figures are being released. Inside EVs is reporting a record month, with EV sales up 43% compared to March 2017.

Makes

The most widely represented EV make in CT remains Tesla with 1617 vehicles, followed by Chevrolet with 1504 and Toyota with 1191.

Cities

With respect to cities, Greenwich remains the city with the most EVs at 511. Westport is third with 266, though it has the highest per capita incidence of EVs at 1%, roughly 3.5 times the incidence of the state as a whole.

One of the most frequent questions we got when we did our analysis last year was how many fuel-cell vehicles were in the file. The answer this year is the same as last year: NONE!

There were several new models represented this year, including the Honda Clarity PHEV, Chrysler Pacifica PHEV, and the Mini-Cooper PHEV.

Increases

The makes with the largest percentage increases among those with a major EV presence (arbitrarily defined as at least 300 units) are Chevrolet at 52.4%, Toyota at 51.9%, Nissan at 33.3%, and Tesla at 21.4%. The Chevy increase was driven by the introduction of the BEV Bolt. Toyota introduced the Prius Prime, the new version of its plug-in Prius which is selling much better than the previous model. Nissan is transitioning to the new Leaf.

The elephant in the room is, of course, the Tesla Model 3. Given that Tesla is the most widely represented EV brand in the state and given the fact that there is a backlog of unfilled reservations, if Tesla manages to wrangle its manufacturing bottleneck, it could change the complexion of the numbers. There were only 4 Model 3s included in this file. During recent testimony in Hartford, Tesla reported having over 3000 Model 3 reservations in the state. In Westport, Tesla represents 51% of all plug-ins and it accounts for 8.3% of all of the Teslas registered in the state. That projects out to something like 250-300 Model 3 reservations in Westport. In other words, if this is accurate, it represents a number roughly equal to all of the plug-ins currently registered in the town.

We won’t know for a while about the Model 3, but we will be following up with additional information from our analysis of the data and an update to our interactive dashboard. Stay tuned!