



# MARCON

Contributing to our clients' successes since 1986

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Market Research



Strategy



Project design,  
implementation  
& management



# MARCON

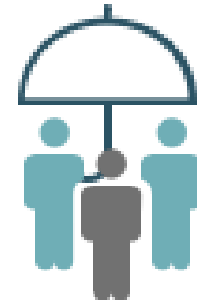
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Mobility



Energy



Insurance

Sustainability  
New technologies

Renewables  
Energy Efficiency

Property &  
Casualty



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**ELECTRIC  
MOBILITY  
CANADA**

ACCELERATING ELECTRIC  
TRANSPORTATION



**MOBILITÉ  
ÉLECTRIQUE  
CANADA**

ACCÉLÉRER L'ÉLECTRIFICATION  
DES TRANSPORTS



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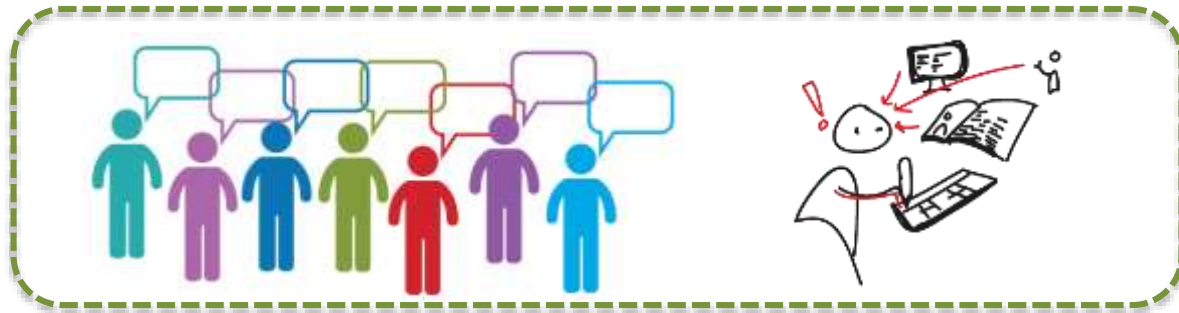
## TEI IET

Transportation  
Evolution Institute

Institut de l'évolution  
du transport



# EMC Roadmap

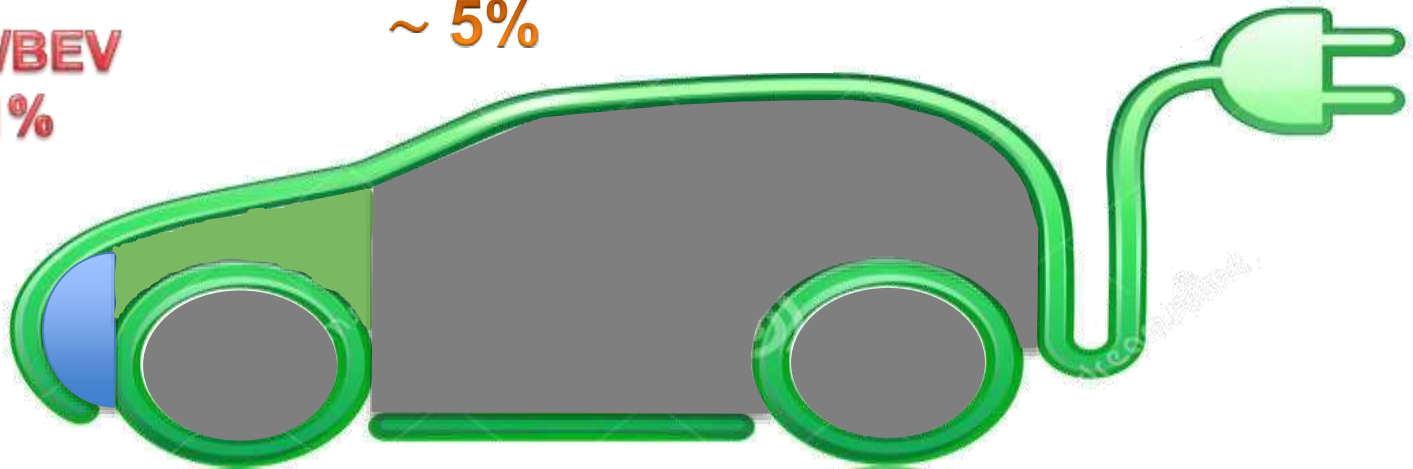


# Status

PHEV/BEV  
< 1%

Mild Hybrid  
~ 5%

Gasoline  
~ 95%



- Limited number of PHEV / BEV in service in car sharing fleets in Canada
- Largest Canadian fleet is that of Auto-mobile, a subset of Communauto in Montréal
- Numerous valid reasons



# Concerns re EV integration in CS

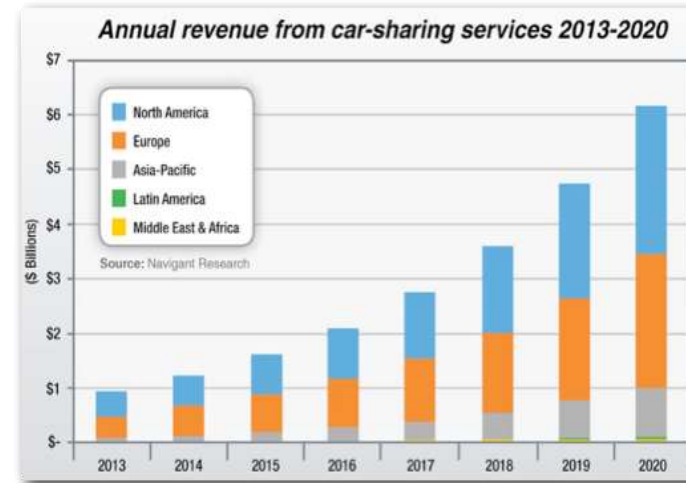
- **Acquisition cost**, despite purchase rebates (BC, ON, QC)
- **Lack of availability** of on-street / curbside **public charging** stations
- **Additional operating costs** of moving vehicles to charging stations
- **Relatively lower profitability** associated with usage of EVs
- **Lack of member education & understanding** of EVs and their utilization
  - Range anxiety limiting EV usage
  - Lack of precise state of charge information communicated to potential users at time of reservation
  - Perceived ease of recharging
- **Lack of public education & understanding** of EVs

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# Opportunity

- Expected **significant CS growth** (Vancouver: NA car sharing leader)
- As membership grows, fleets will deploy **additional vehicles to meet demand**
- Opportunity to **deploy EVs as part of growing CS fleets** ▶ availability of several affordable EV models with >300 km range
- EV integration in CS affords ...
  - Public visibility, link to reliability
  - Member usage: 43% more likely to buy EV



# Critical Success Factors

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- Strong **municipal** support ▶ **Champion** required
- **CS company** must be a **believer and supporter** of electro-mobility
- Availability of curb-side **charging infrastructure**
- **Member education** to ensure comfort with EVs
- **Easy to use** system
- Increased **visibility** (consistency in signage to increase familiarity)
- **Financial incentives** to lower acquisition price & usage cost to members



# Montréal: 1,000 BEV CS fleet

Electric dreams: Coderre wants to see 1,000 electric cars on the road by 2020



WWW.EVS29.ORG

# EVS29

Electric Vehicle Symposium & Exhibition

JUNE 19-22, 2016

Montreal, Quebec, Canada

