AUSTRALIAN EV OWNERSHIP

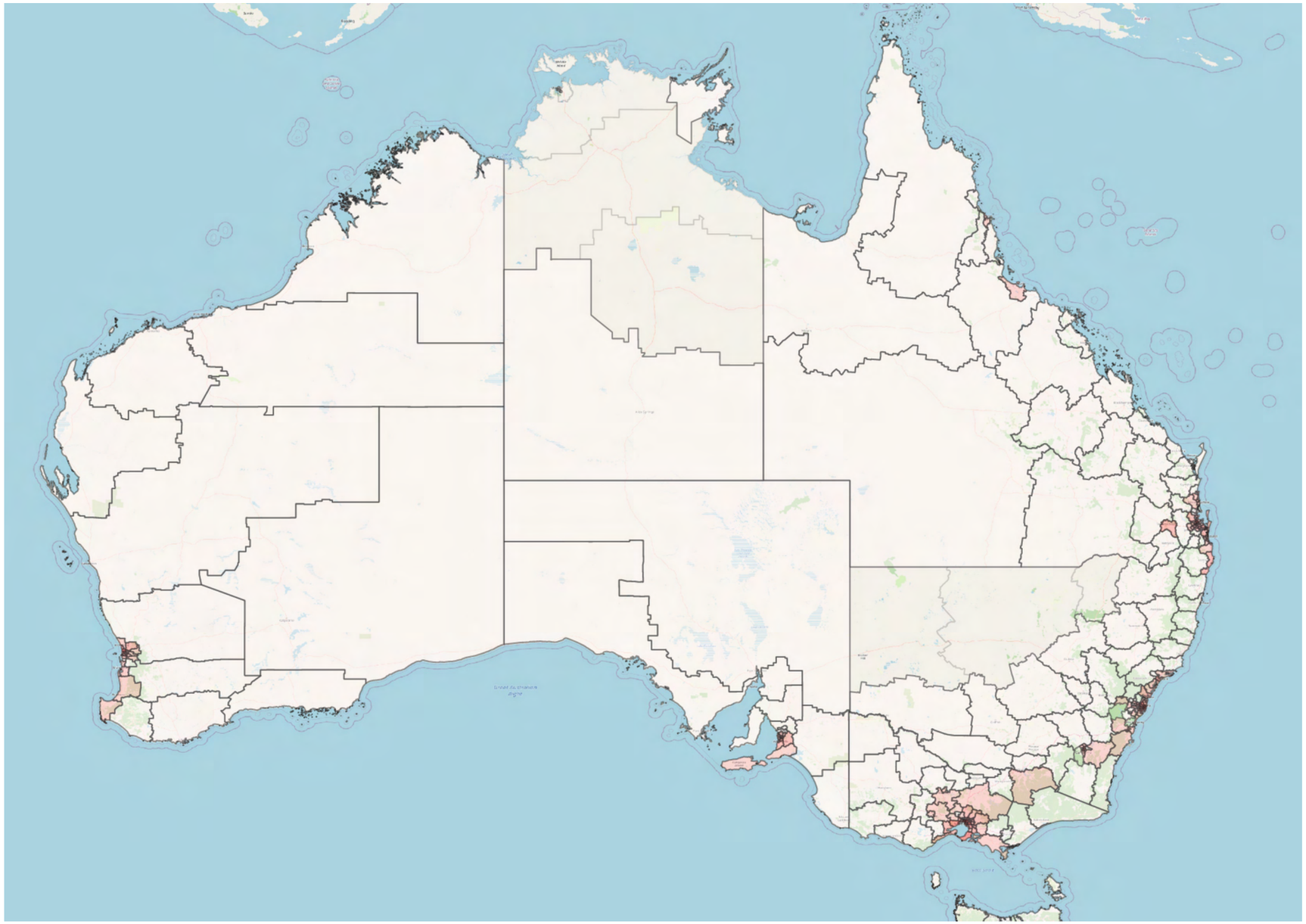
Electric vehicle ownership hotspots around Australia based on 2020 vehicle registrations

EV up

Australia

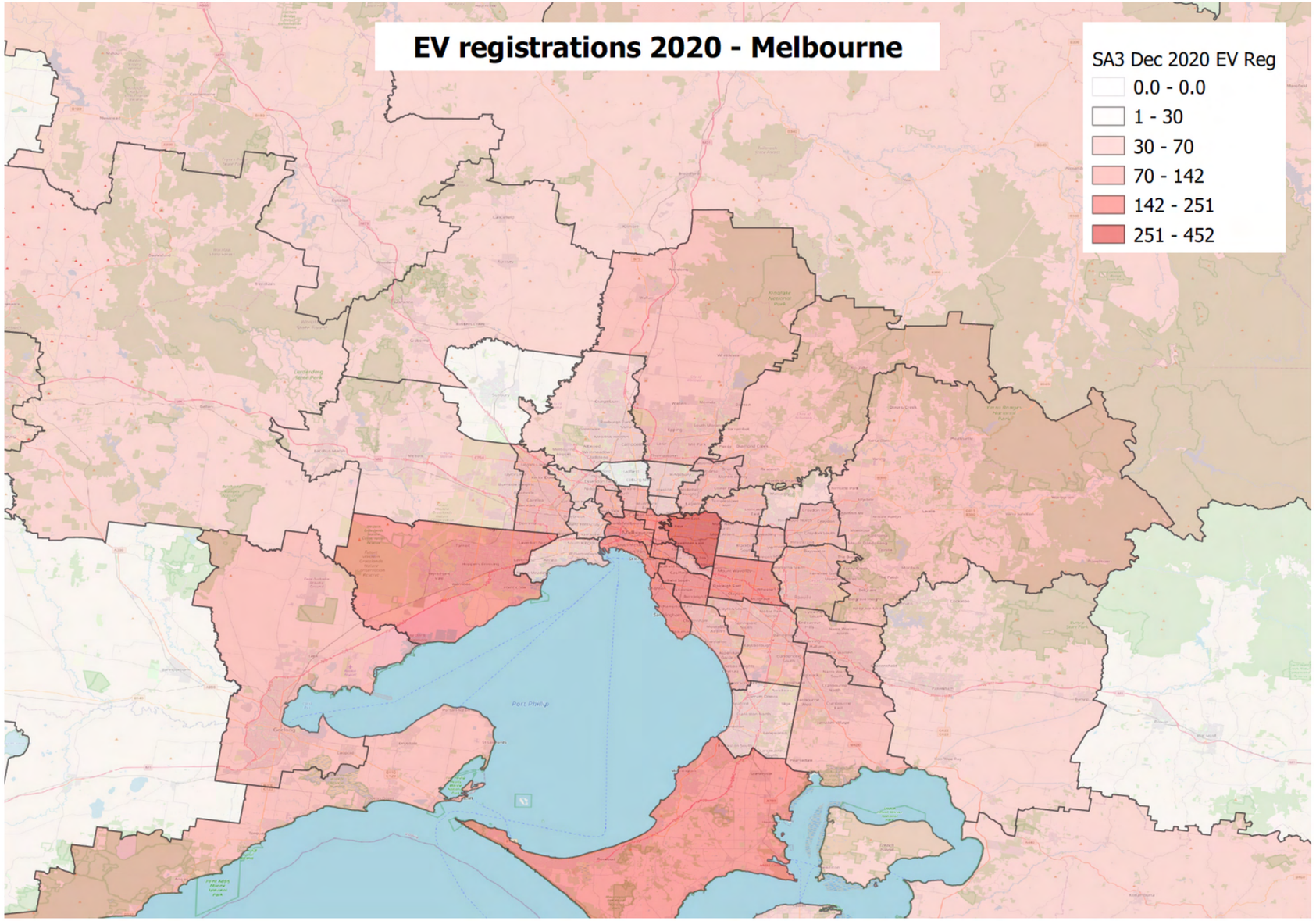
- EV registrations are aligned to populated areas, mostly in capital cities

- However, almost all regions have at least one EV registration (providing the first level of opaque shading)



Melbourne

- Some of the highest concentrations of EVs in the country, particularly in the inner NE.
- Higher rate of “regional” volume than other cities



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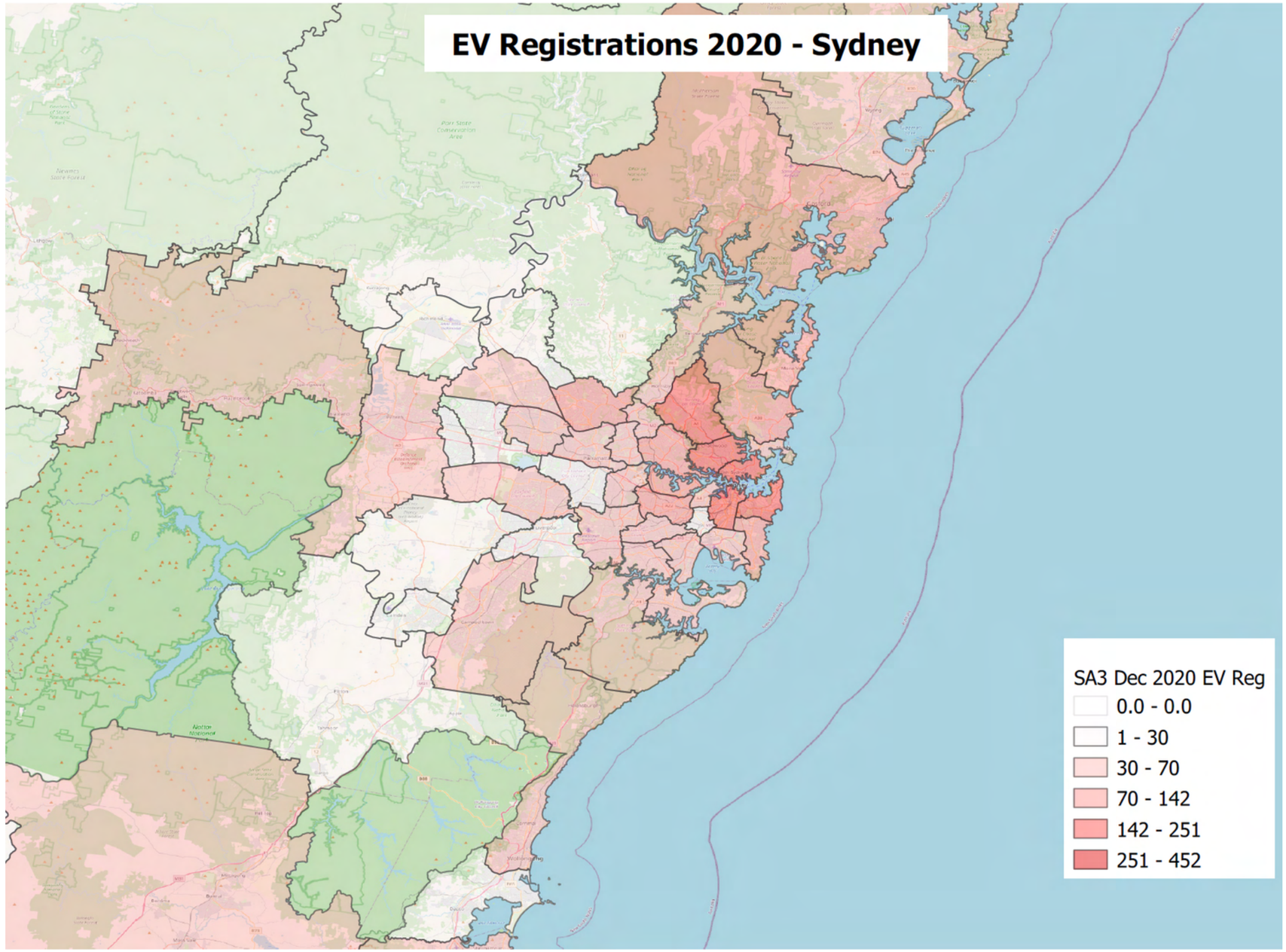
Sydney

- Highest concentration near CBD& north of the harbour, with wealth
- Unlike other cities, less density in surrounding inland regional areas



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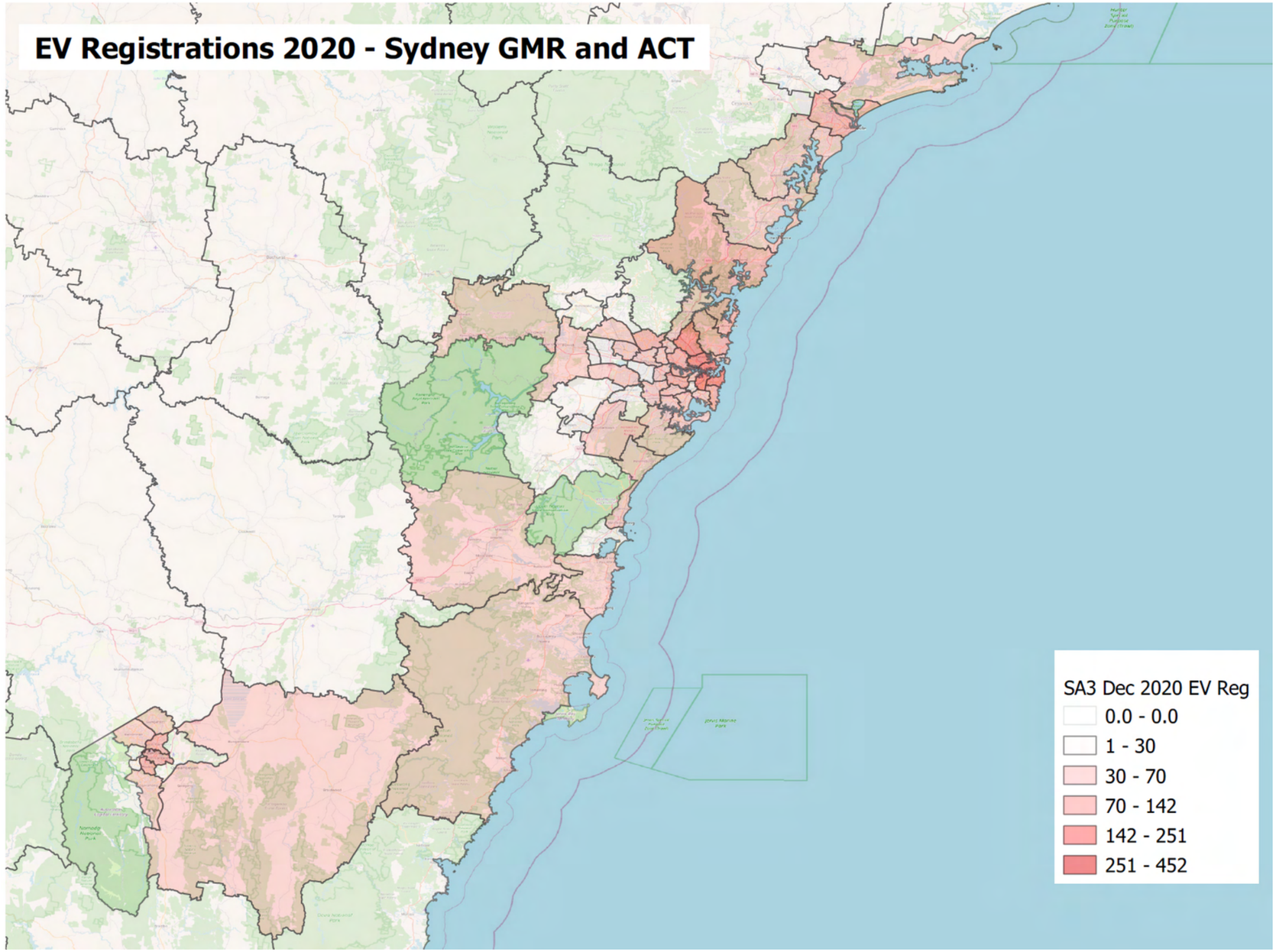
Sydney GMR + ACT

- Density along the coast
- ACT shows reasonable volume despite missing Tesla data for this assessment
- North of Sydney to Newcastle shows moderate density of EVs



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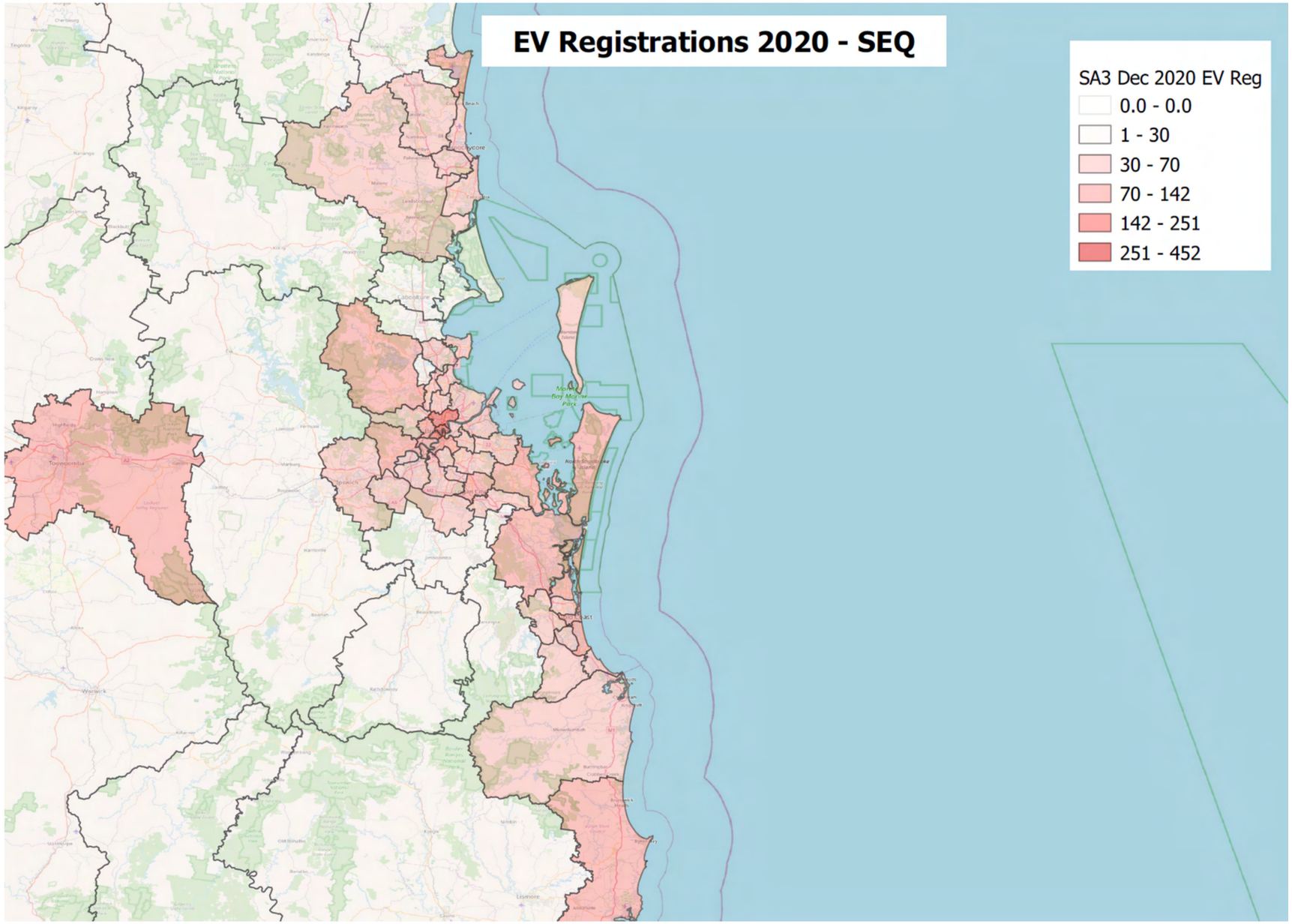
SEQ

- Strong cluster in the centre / inner north of Brisbane
- Coastal regions see most of the volume.
- Caboolture area between Brisbane & Sunshine Coast less dense than surrounding areas.
- Toowoomba & Byron Bay areas are moderate volume



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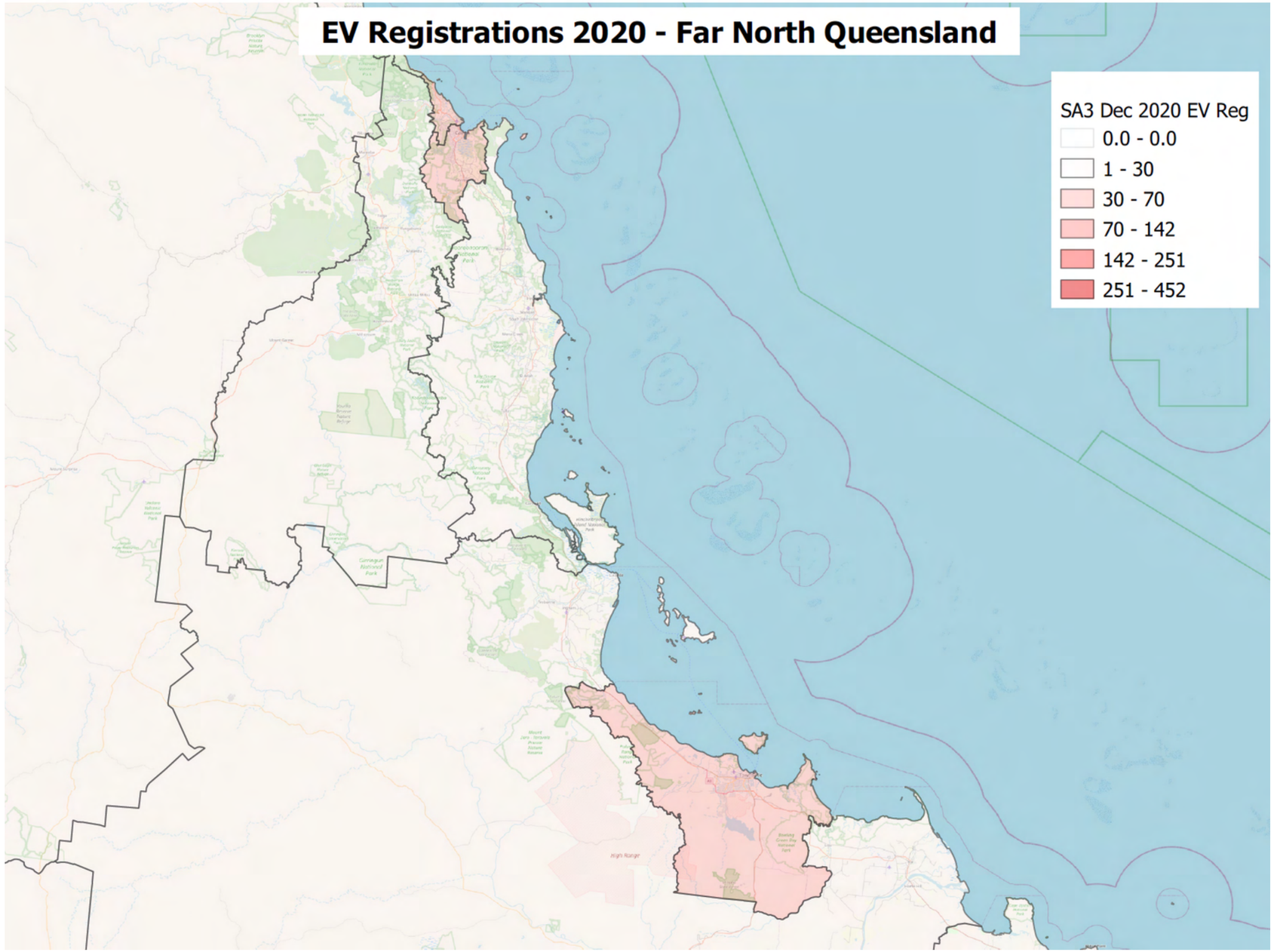
FNQ

- Both Cairns & Townsville have over 30 registrations

- Other areas have smaller numbers (between 1-30 units)



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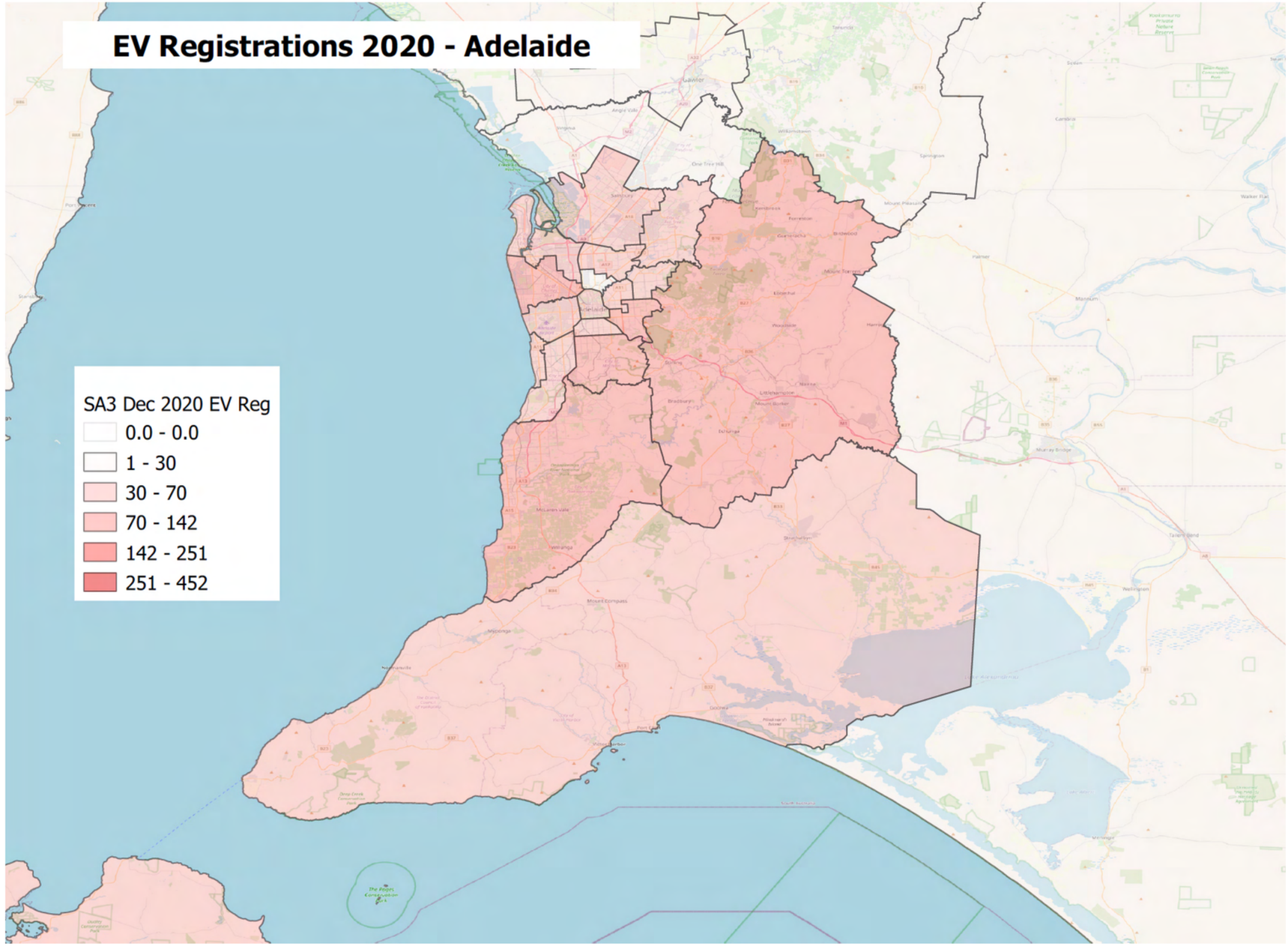
Adelaide

- Adelaide sees an even spread of volume clustered in the populated areas
- Regional areas have very light coverage



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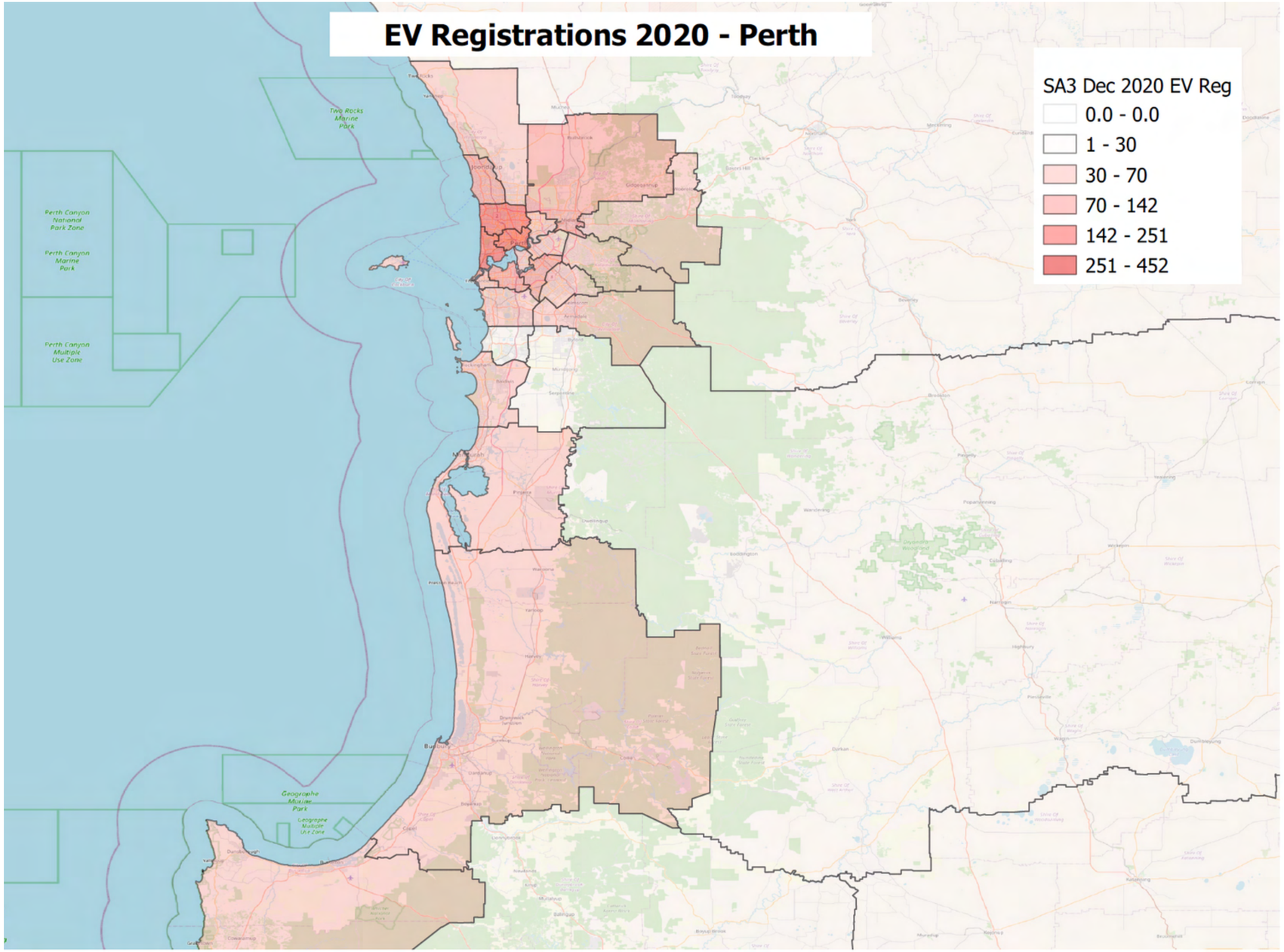
Perth

- North Perth & the City of Stirling has the highest density
- Density is aligned to the coast & the eastern suburbs of Perth



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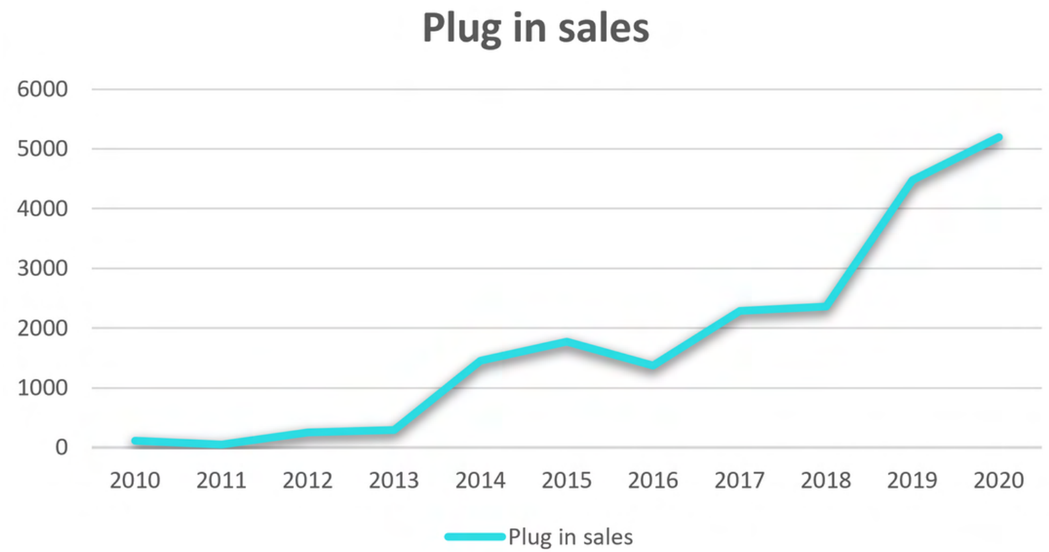
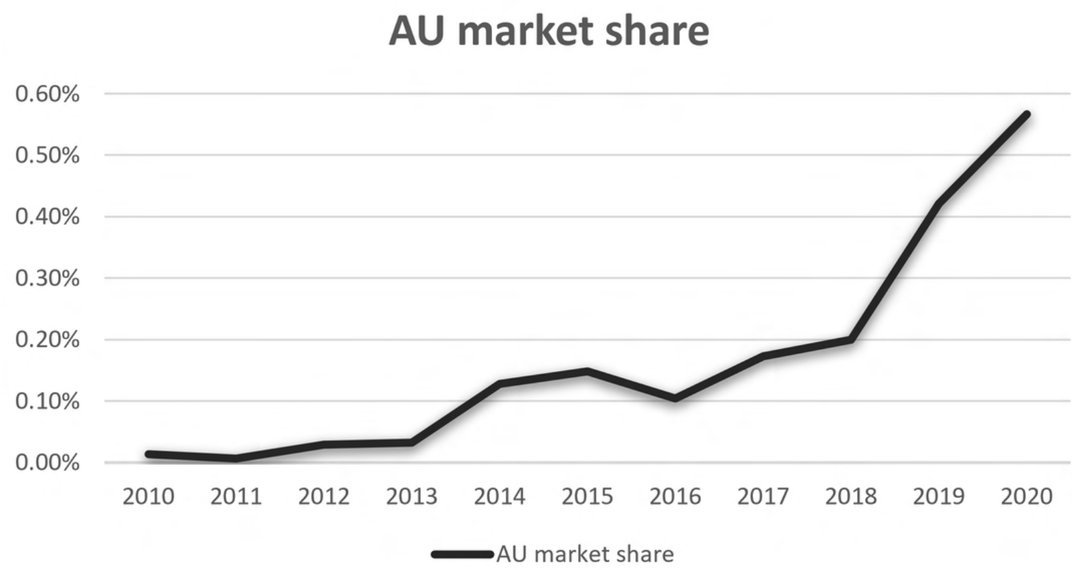
EV registrations over time

- Obtaining robust sales data for EVs is challenging, with Tesla data not routinely available

Observations in data:

- The compound annual growth rate (CAGR) from 2010 to 2020 is 68%.
- The average annual growth rate for the period is 95% per year due to some significant jumps in 2012 and 2014.





Sources: ABS, FCAI, Cars Advice, EVC

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EV growth areas by suburb (2015 to 2020)

Tesla				
State	Suburb	Total	CAGR	Rank
NSW	MOSMAN	78	81%	1
VIC	KEW	65	130%	2
VIC	BRIGHTON	61	72%	3
VIC	MELBOURNE	61	47%	4
NSW	VAUCLUSE	56	56%	5
VIC	TOORAK	54	37%	6
NSW	BELLEVUE HILL	46	50%	7
VIC	CAMBERWELL	44	62%	8
VIC	POINT COOK	42	155%	9
NSW	SYDNEY	42	60%	10
NSW	ALEXANDRIA	41	92%	11
VIC	CREMORNE	40	52%	12
QLD	HOPE ISLAND	39	150%	13
VIC	RICHMOND	39	58%	14
NSW	CASTLE HILL	37	87%	15
VIC	SOUTH YARRA	37	65%	16
VIC	HAWTHORN	37	65%	17
QLD	FORTITUDE VALLEY	36	78%	18
VIC	GLEN IRIS	36	78%	19
VIC	MOUNT WAVERLEY	35	77%	20

Other Electric				
State	Suburb	Total	CAGR	Rank
ACT	WODEN	67	68%	1
ACT	CANBERRA	61	128%	2
NSW	SPIT JUNCTION	59	97%	3
VIC	MELBOURNE	47	51%	4
ACT	DICKSON	44	71%	5
NSW	POTTS POINT	42	155%	6
NSW	NORTH RYDE	42	111%	7
NSW	SYDNEY	42	84%	8
VIC	MULGRAVE	40	111%	9
NSW	GOSFORD	40	82%	10
NSW	VAUCLUSE	39	67%	11
QLD	SOUTH BRISBANE	36	78%	12
TAS	HOBART	36	64%	13
NSW	LANE COVE	35	63%	14
VIC	TOORAK	35	48%	15
VIC	GLEN WAVERLEY	34	63%	16
NSW	PYMBLE	33	101%	17
NSW	BONDI BEACH	32	40%	18
ACT	BELCONNEN	30	72%	19
NSW	KILLARA	30	72%	20

The data highlights the most populated EV suburbs and their relative growth (CAGR) from 2015 to 2020.

The data is split by Tesla and all other EVs which is an important distinction. Of the top 20 suburbs of each group, only 4 overlaps. Some of this is due to the lack of Tesla data for ACT which may have provided more overlapping results.

There is some link between affluent suburbs and Tesla sales volume, but in general, all suburbs represented are either inner city or known to be affluent. This is a likely correlation.

It is clear that Victoria and NSW suburbs feature heavily, QLD less so. The Tesla list only has three QLD suburbs, two on the Gold Coast even before the Gold Coast Tesla store had opened (Feb 2021).

The EV growth experienced by some areas is influenced by the potential in that area. Most suburbs in the top 20 are at or above the national average 2015-20 CAGR of 68% apart from some that may be saturating, slowing down, or had a significant volume of early adopters.

Caution must be taken with potential OEM HQ registrations in Mulgrave Vic (All non-Tesla), Richmond Vic, Alexandria NSW and Fortitude Valley Qld (Tesla sites).

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EV registrations by state

The table below offers a combined minimum registered volume of 20,001 EVs nationally at end of 2020

Jurisdiction	Minimum Reg'd
NEW SOUTH WALES	7080
VICTORIA	5427
QUEENSLAND	3830
WESTERN AUSTRALIA	1715
SOUTH AUSTRALIA	1070
TASMANIA	189
AUSTRALIAN CAPITAL TERRITORY	636
NORTHERN TERRITORY	54
AUSTRALIA	20001

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