



The Electric Vehicle Opportunity

NBCUniversal

2021

Electric Vehicles represent a key opportunity

“

Global automakers are planning an unprecedented level of spending (\$300B) to develop electric vehicles



REUTERS

“

The future looks bright for electric vehicle growth. Consumers are more willing than ever to consider buying EVs

McKinsey&Company

“

Americans overwhelmingly want to see more electric cars available to buy, and believe that electric vehicles have real benefits

CR Consumer Reports™



The industry investment is unprecedented

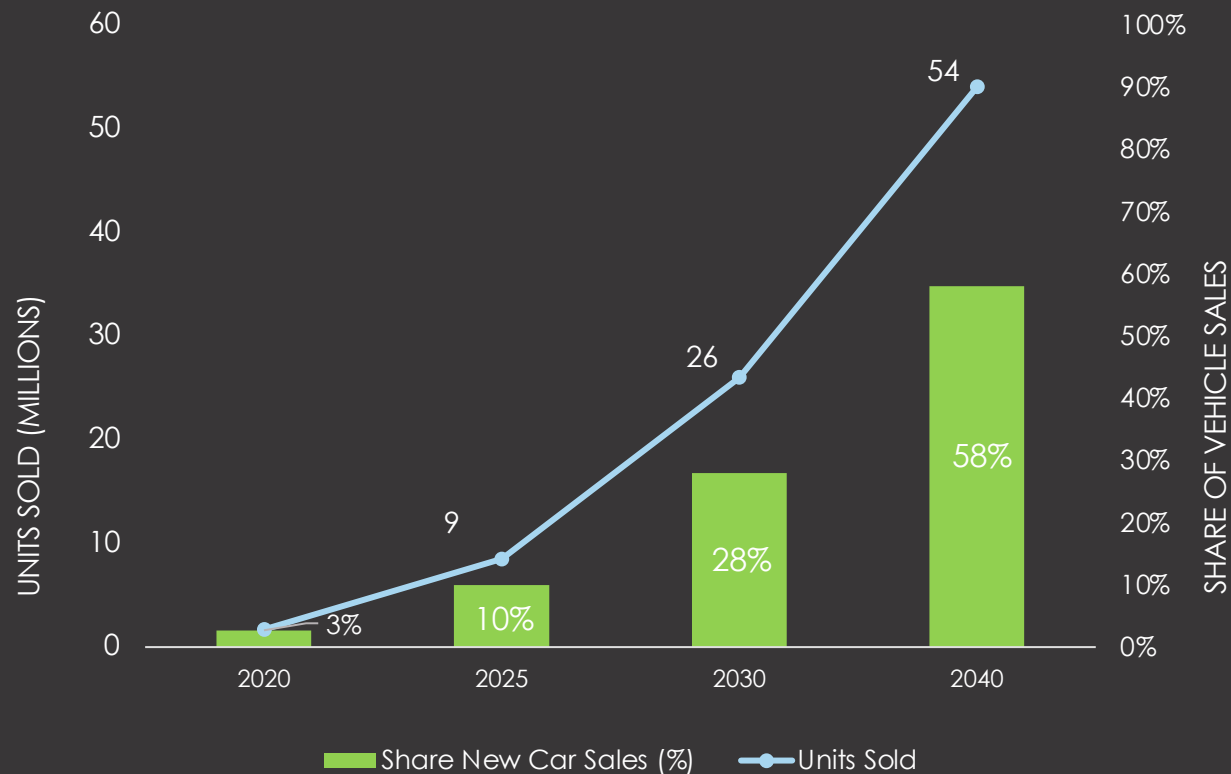
~\$300B

The investment the global auto industry is
expected to spend on the development of
EVs over the next 10 years

FORECAST

Global EV Sales Unit and EV Share of New Cars

2020-2040

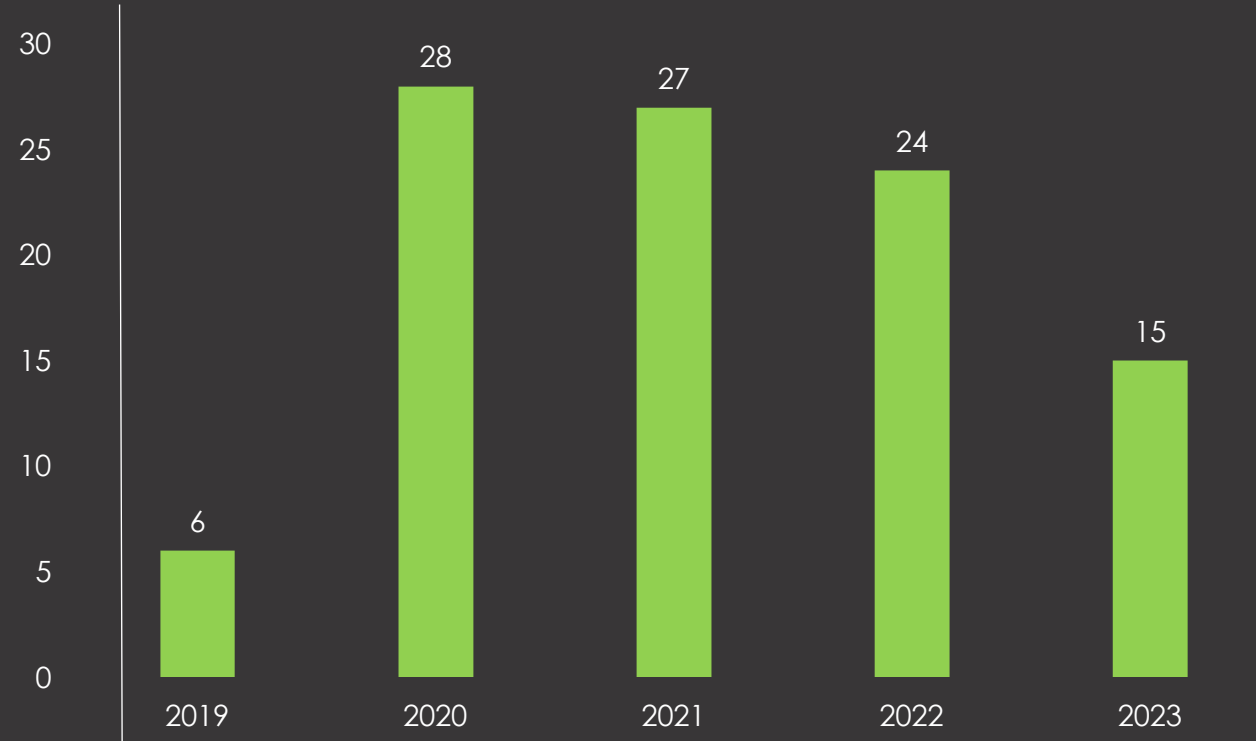


We believe the EV opportunity is even greater than current projections

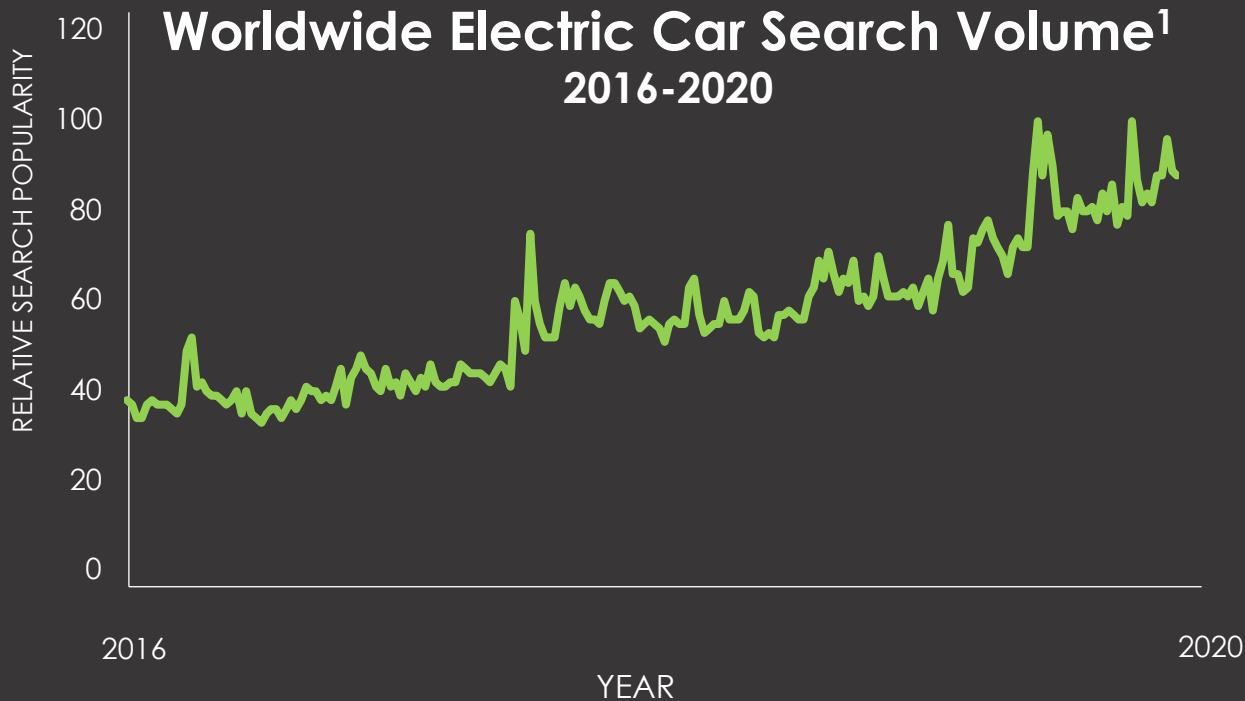
The market will soon be flooded with EV options

100 EVs will launch between 2019 and 2023, presenting consumers with more options than ever

EV Launches by Year in the US



Consumer interest in EVs is on the rise



96% of EV owners say they would buy another electric vehicle²

Consumer preference for alternative powertrains is up

+12% vs 2019³

Covid-19 has created net new challenges, and amplified existing pressures

Delayed Launches

Covid-19 pushed back the already high number of EV launches – leading to more market entries at the same time.

**Escalated
Competitive Market**

Potential Increased Consumer Interest

New consumer interest in sustainability as personal health and safety concerns rise. Ride sharing, public transportation, and air travel are being reconsidered.

**Larger Market of
Potential Buyers**

Continued Investment

Investment and emphasis has not slowed down despite the impact of COVID-19.

**Increased Pressure to
Launch and Succeed**

Decreased Fuel Cost

Fuel and oil costs continue to decline because of reduced everyday movement.

**Magnified Emphasis on
Value over Cost**



Despite this, for the first time in decades, every EV manufacturer will be faced with the same challenge

Navigating the electrification age

Traversing an era while evolving the brand and building credibility

Generating awareness of your electrified vehicles, and your electric innovation and technology

Establishing yourself as leader in the electrification race



This new EV era will require a fundamental shift in marketing

From: **Organic Reach**



Word of Mouth



OEM Events



PR



Sliced Solutions

To: **Holistic Advertising**



Content & Storytelling



Integrated Campaigns



Thought Leadership



Full-funnel Solutions



**The winners will
be those who
overcome
three key
barriers**

1

Misperception

2

Credibility

3

Influx of Options



1

Misperceptions

Information disparity
surrounding EVs



59% of U.S. consumers still
prefer a gas/diesel engine for
their next vehicle as of 2020



Price is the **#1 factor** deterring EV
consideration, especially as EV Tax
rebates fall for market leaders



Range anxiety and
charging infrastructure



2

Credibility

Consumers' perception of EV OEMs is skewed



At the start of 2020, Tesla was the highest performing automaker in terms of **total return, sales growth and long-term shareholder value.**

Bloomberg



Ms. Barra and other G.M. executives suggested that Wall Street had not recognized the company's progress ...

"We have got to tell our own story," Mr. Reuss said. "The story hasn't gotten out. This is a real transformation of the company."

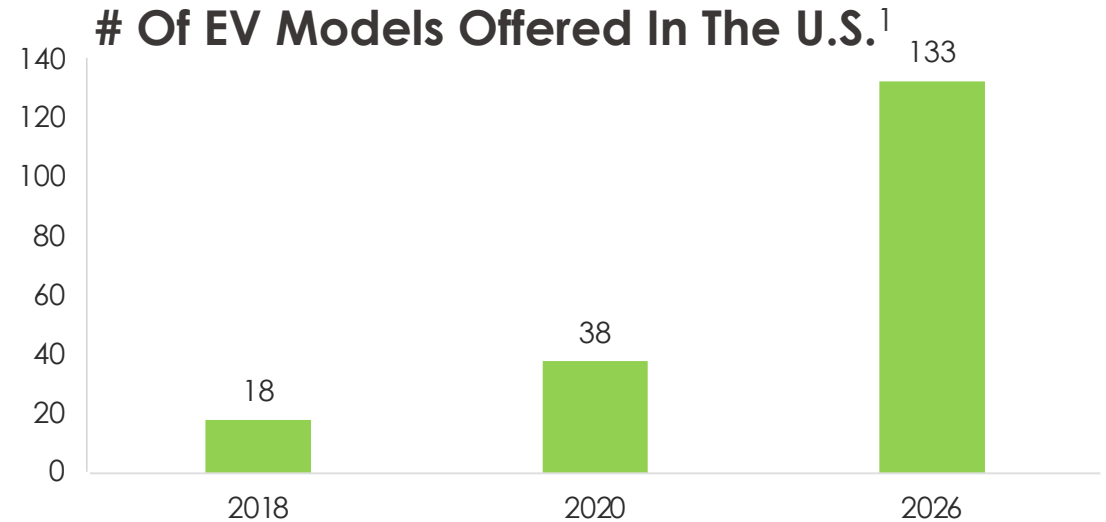


3

Influx of Options

Interest needs to be converted into demand

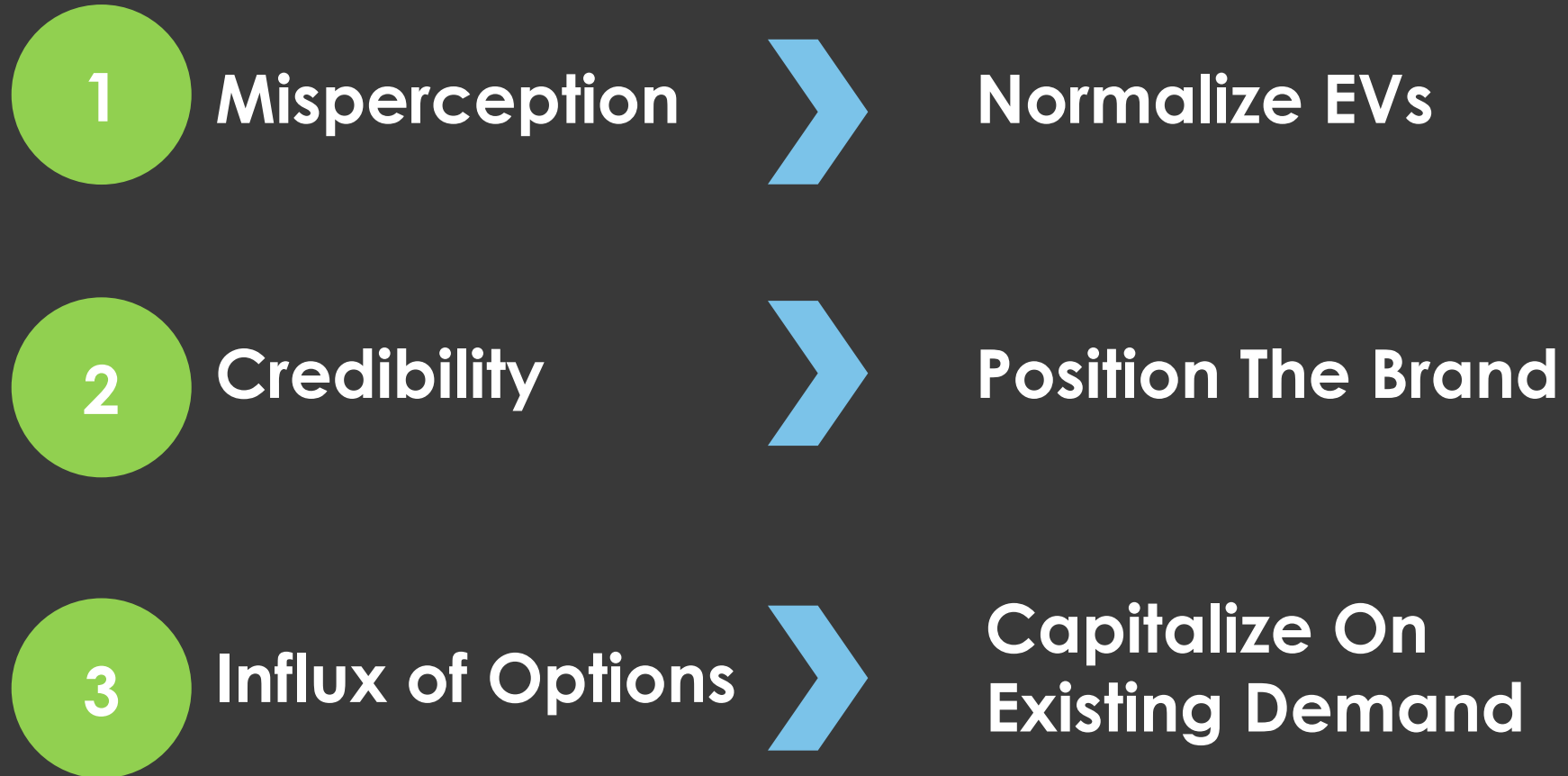
The number of EV options offered in the U.S. is expected to surpass 100 by 2026



... But EVs are still the minority

In 2019, EVs made up 2% of the 17M vehicles sold²

How do we overcome these barriers, and convert interest into demand?



The NBCU approach

Addressing consumer barriers

CAPITALIZE ON EXISTING DEMAND

Convert the Known

Get EV Prospects who are considering an EV for their next vehicle
to believe now is the time to buy an EV
by reaching them with relevant messaging based on their place in the consumer journey

NORMALIZE EVs

Drive New Demand

Get EV Prospects who are unaware, or misinformed
to consider EVs as a viable option
by touting the everyday appeal and debunking misconceptions

POSITION THE BRAND

Highlight Your EV Proposition

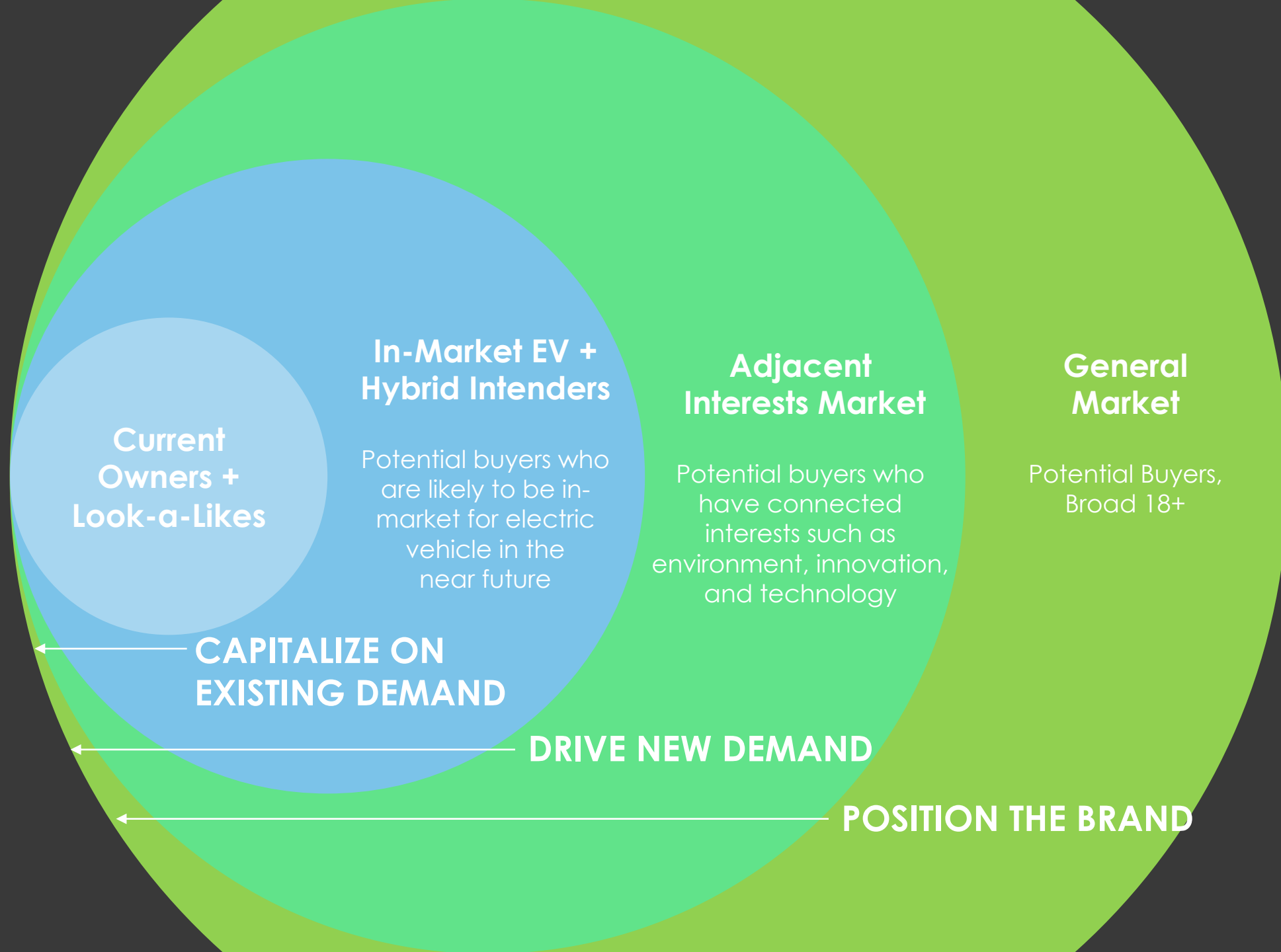
Get all potential buyers
to view your brand as a preferred EV manufacturer
by reinforcing reputation and credibility around your EV endeavors

← MEASURE, TEST, AND LEARN →



Connecting with narrow to broad audiences

Engaging potential buyers no matter their phase in the journey



NBCU solutions

A cross platform approach to achieving your objectives

CAPITALIZE ON EXISTING DEMAND

Convert the Known

NORMALIZE EVs

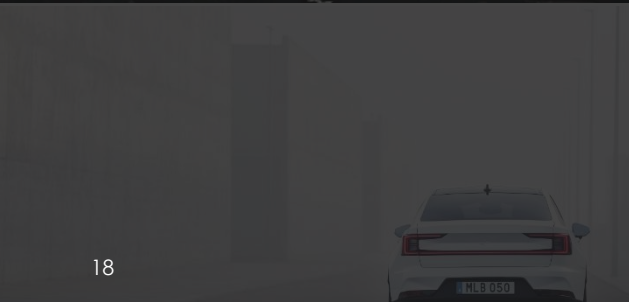
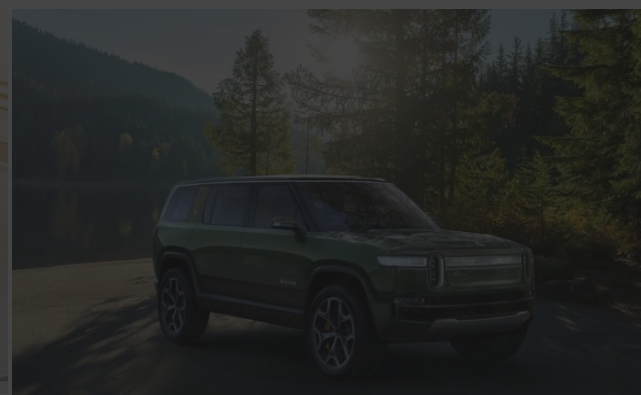
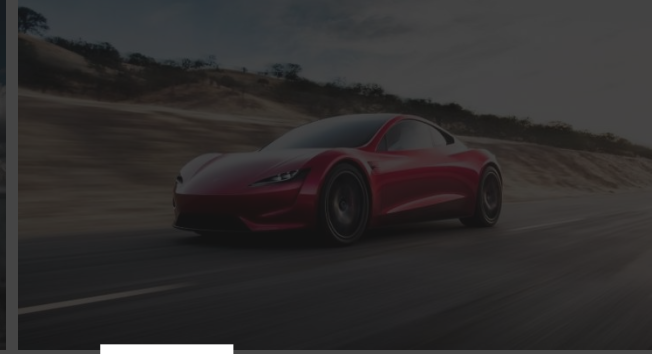
Drive New Demand

POSITION THE BRAND

Highlight Your EV Proposition



LEAD GEN THROUGH
TARGETED DISTRIBUTION



Thank You

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