



Chrysler Group LLC

University of Michigan Business School Digital Marketing Discussion

December 2011



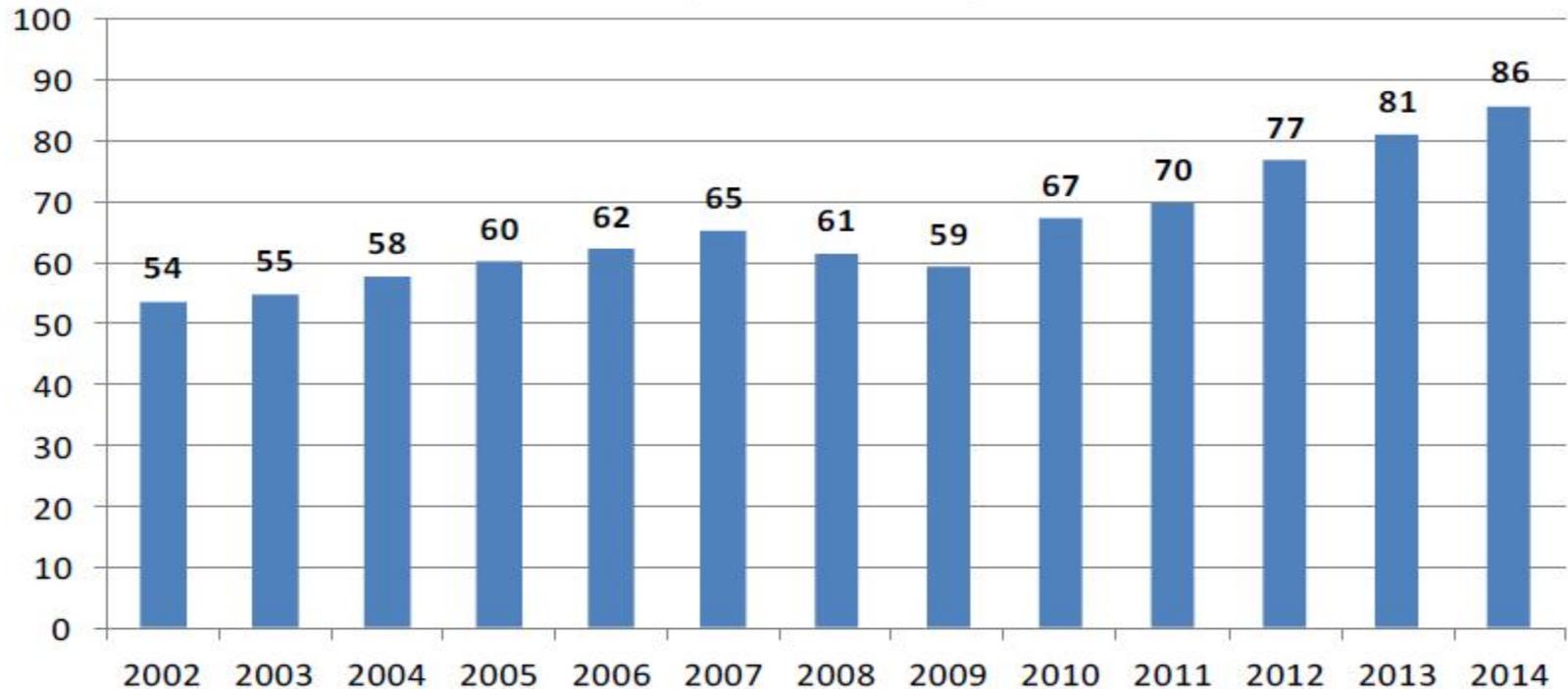
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Market trends

Key figures - Global market

- In 2010, the global market recovered from the disastrous 2008-2009 recession in the Western World. 67 million light vehicles were sold up from 59m in 2009. From that low point, growth in car sales is forecast to continue, to reach 85m in 2014.

Global Car Sales 2002-2014 (million units)



Source: IHS, Sept 2011



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Market trends

Key figures - Global market

- Most of the 2012-2014 growth will come from emerging markets and BRICs.
- China alone is already bigger than North America in market share.

Volume of light vehicle sales by region (million units, 2008-2014)



CAGR 2008-2014: World: 5.7%, North America: 3.2%, South America: 7.1%, Europe: 0.4%, Greater China: 18.1%, South Asia: 10.8%, Japan/Korea: 0.9%, Middle East/Africa: 5.2%

Source: IHS, Sept 2011



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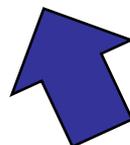
CHRYSLER GROUP OVERVIEW



2011 Guidance Revised



Worldwide Shipments	> 2.0 M
Net Revenues	> \$55 B
Modified Operating Profit	> \$2.0 B
Modified EBITDA	> \$4.8 B
Adjusted Net Income	~ \$0.6 B* (revised from \$0.2-\$0.5 B*)
Free Cash Flow	> \$1.2 B (revised from >\$1.0 B)



* Excludes loss on extinguishment of debt of \$551 million

October 28, 2011

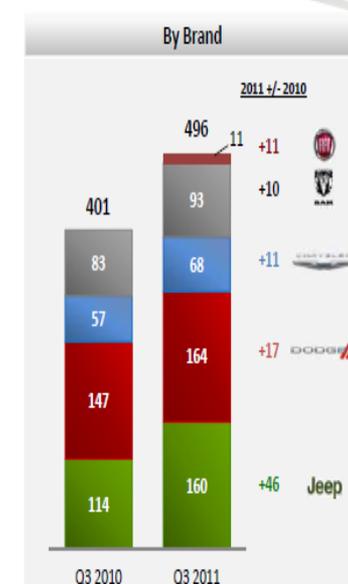
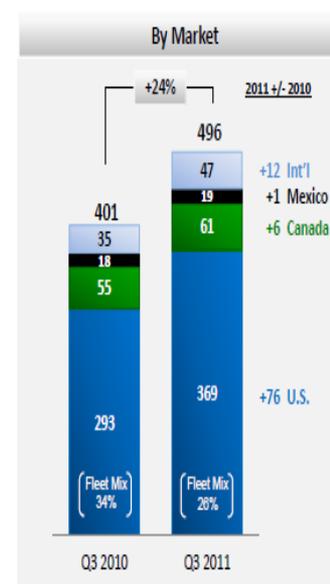
(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definition of non-U.S. GAAP financial measures)

Worldwide Vehicle Sales

Third Quarter



Units (000s)



2011 year-to-date worldwide vehicle sales totaled 1,376k (compared to 1,142k vehicles for the same period a year ago) representing an increase of 20%

Note - Excludes contract manufactured vehicles, primarily for Fiat (17k in Q3 2011 and 4k in Q3 2010)

October 28, 2011

(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definition of non-U.S. GAAP financial measures)

Ram & FIAT Brands



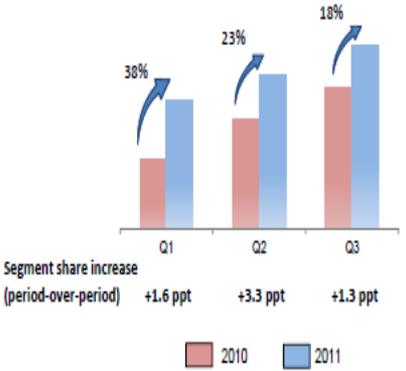
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Ram Truck Success

New versions contribute to share increases



Ram Pickup Period-over-Period U.S. Sales Gains



Ram pickups continue to gain momentum in the marketplace with quarterly year-over-year gains during 2011

New versions driving share gains (versus 2010) in the Large Pickup segment

Ram Tradesman



- Designed for the commercial buyer who is looking for capability and low cost of ownership
- 5.7L HEMI V8 engine
- Tows up to 10,400 pounds - thousands more than similar priced competitors

Ram Express



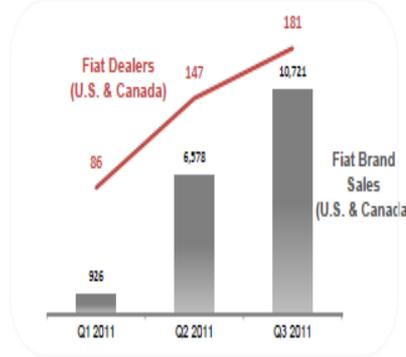
- Designed for the cost conscious new truck buyer who is looking for style and performance
- Available in regular, quad or crew cab
- 5.7L HEMI V-8 engine

October 28, 2011

(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definition of non-U.S. GAAP financial measures)



Brand in U.S. and Canada



FIAT brand sales increasing in U.S. and Canada; dealers, new editions and marketing campaigns continue to launch



Fiat 500 and Fiat 500 Cabrio by Gucci

- New special editions customized by Gucci in partnership with FIAT's Centro Stile
- Unique interior and exterior
- Available December 2011

FIAT – Jennifer Lopez Advertising Campaign

The news about the Fiat 500 and Jennifer Lopez advertising campaign generated almost 240 million overall media impressions



"Call it the J-Lo Factor.

"Santa Monica-based auto site Edmunds.com said today that interest in the new-for-2012 Fiat 500 has been dramatically boosted by the appearance of actress-singer Jennifer Lopez in a recently introduced television commercial.

"In the ad, Lopez jukes and drives a Fiat 500 around a crowd of pursuing, adoring fans.

"Edmunds.com said consumer consideration for the Fiat 500 on its site has climbed 31 percent since the ad made its debut on the Sept. 12 telecast of ESPN's Monday Night Football. On Sept. 18, when the ad aired throughout an entire Sunday of NFL telecasts, Fiat 500 consideration spiked 95 percent."

Edmunds Auto Observer 9/28/11

October 28, 2011

(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definition of non-U.S. GAAP financial measures)

Jeep & Chrysler Brands



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2012 Jeep Grand Cherokee

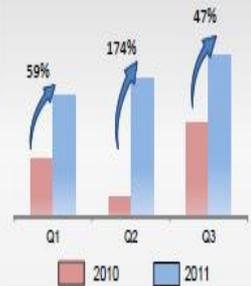
The "Most Awarded SUV Ever"; worldwide sales success



- Jeep Grand Cherokee is the most awarded SUV ever, receiving over 30 awards from automotive journalist associations, print/on-line/television media outlets and industry organizations
 - ✓ Also, recently voted "SUV of Texas" and the Overland Summit model won top honors in the Luxury SUV category by the Texas Auto Writers Association
- 3.6L Pentastar V-6 engine delivers up to 23 MPG (highway) fuel efficiency and 550 mile driving range
- Jeep Grand Cherokee SRT8 for Europe shown at Frankfurt Motor Show (September 2011); to be available in Europe starting Q1 2012
- Sales increases in all markets (Q3 YTD 2011 versus Q3 YTD 2010)
 - U.S. + 78%
 - Canada + 86%
 - Mexico +101%
 - International + 73%



Jeep Grand Cherokee Period-over-Period Worldwide Sales Gains



"The 2012 Grand Cherokee, with its well-trimmed and roomier interior, powerful V6 and more refined performance and ride, is in fighting shape as a top contender among midsize SUVs."

Edmunds.com

October 28, 2011

(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definition of non-U.S. GAAP financial measures)

2012 Chrysler 300

New model builds on history as most awarded new car ever



New "If You're Gonna" advertisements link the 300 to "Imported from Detroit" campaign



- First eight-speed automatic transmission in a domestic, luxury sedan
- 3.6L Pentastar V-6 engine with 292 horsepower
- Best-in-class highway fuel economy, with 31 mpg highway
- Best-in-class V-6 AWD fuel economy, with 18 mpg city and 27 mpg highway
- World-class interior takes domestic luxury to new level
- All-new luxury sedan earned "excellent" rating from a leading consumer magazine

U.S. sales gaining momentum as vehicle availability increases since Q1 2011



October 28, 2011

(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definition of non-U.S. GAAP financial measures)



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DIGITAL MARKETING TRENDS

Digital Growth by Markets



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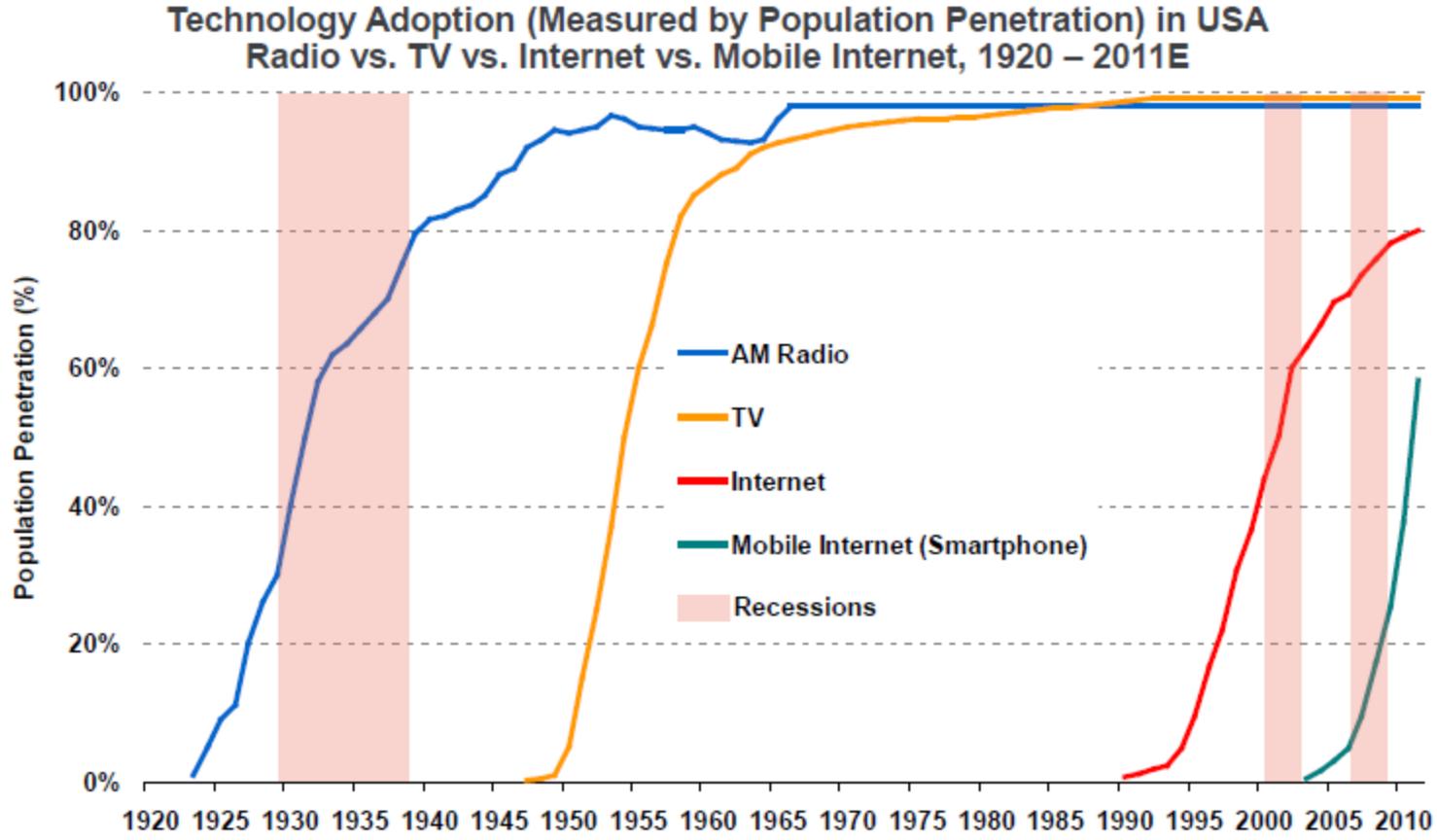
Rank	Country	07-10 Internet User Additions (MMs)	2010 Internet Users (MMs)	Y/Y Growth	Population Penetration
1	China	246	459	20%	34%
2	India	42	88	43	8
3	Nigeria	35	45	2	28
4	Russia	25	60	0	42
5	Iran	24	37	31	49
6	USA	22	244	2	79
7	Brazil	21	79	4	41
8	Philippines	18	23	292	25
9	Mexico	13	35	24	31
10	Pakistan	12	29	43	17
	Top 10	457	1,099	16%	29%
	World	693	2,054	13%	30%

Note: *Russia data as of 6/10; all other data as of 12/10. Source: United Nations / International Telecommunications Union.

Digital Adoption by Platforms



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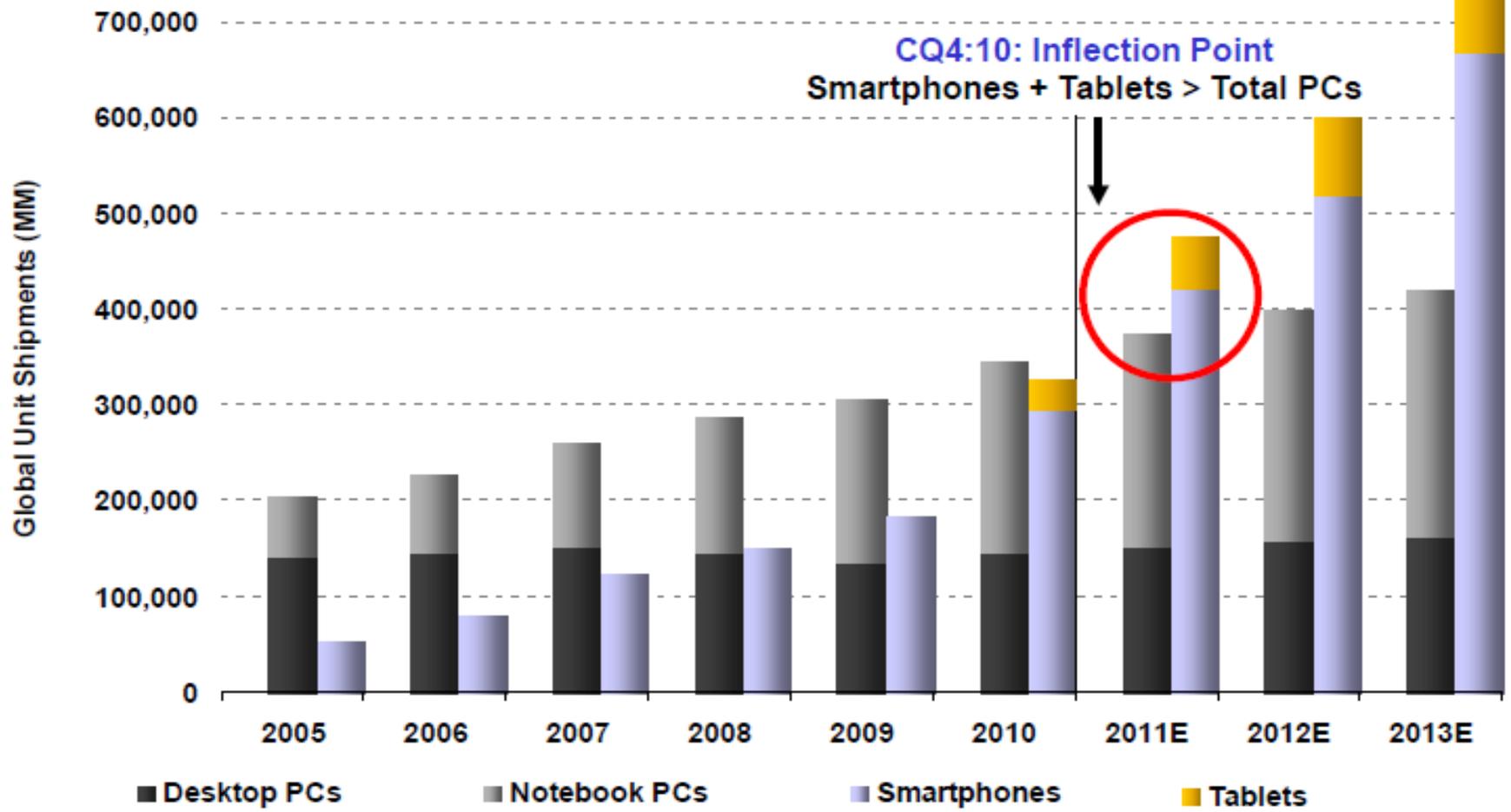
Source: Radio penetration data per Broadcasting & Cable Yearbook 1998, Internet penetration data per World Bank / ITU, Mobile Internet (smartphone) data per Morgan Stanley Research; 3G data per Informa.

Mobile is a Foundational Platform



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Global Unit Shipments of Desktop PCs + Notebook PCs vs. Smartphones + Tablets, 2005-2013E



Notebook PCs include Netbooks. Source: Katy Huberty, Ehud Gelblum, Morgan Stanley Research. and Estimates as of 2/11

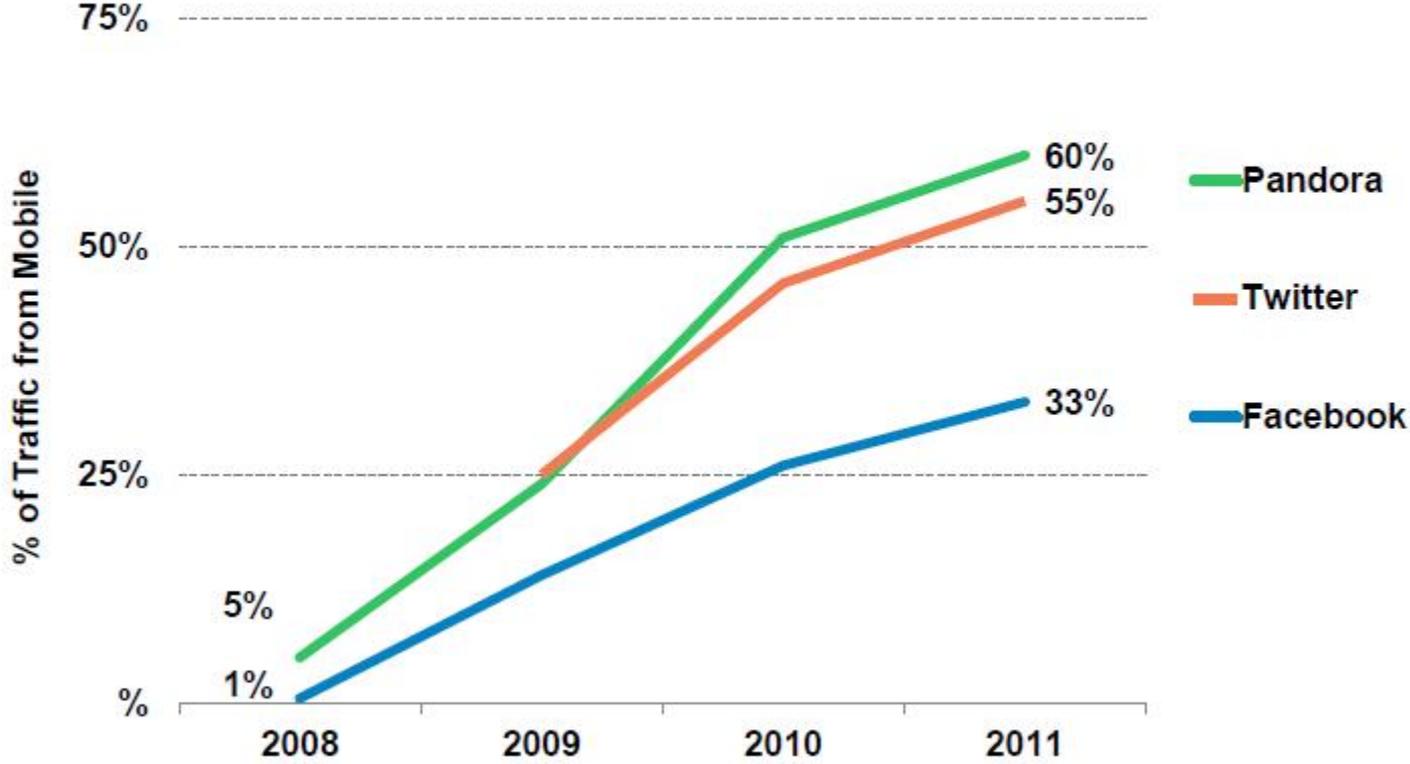


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KP
CB

Mobile Usage – Big & Ramping Fast

% of Traffic From Mobile Devices, Pandora, Twitter & Facebook, 2008 – 2011



Source: Pandora S1, Twitter, Facebook.

Copyright 2011. All rights reserved.

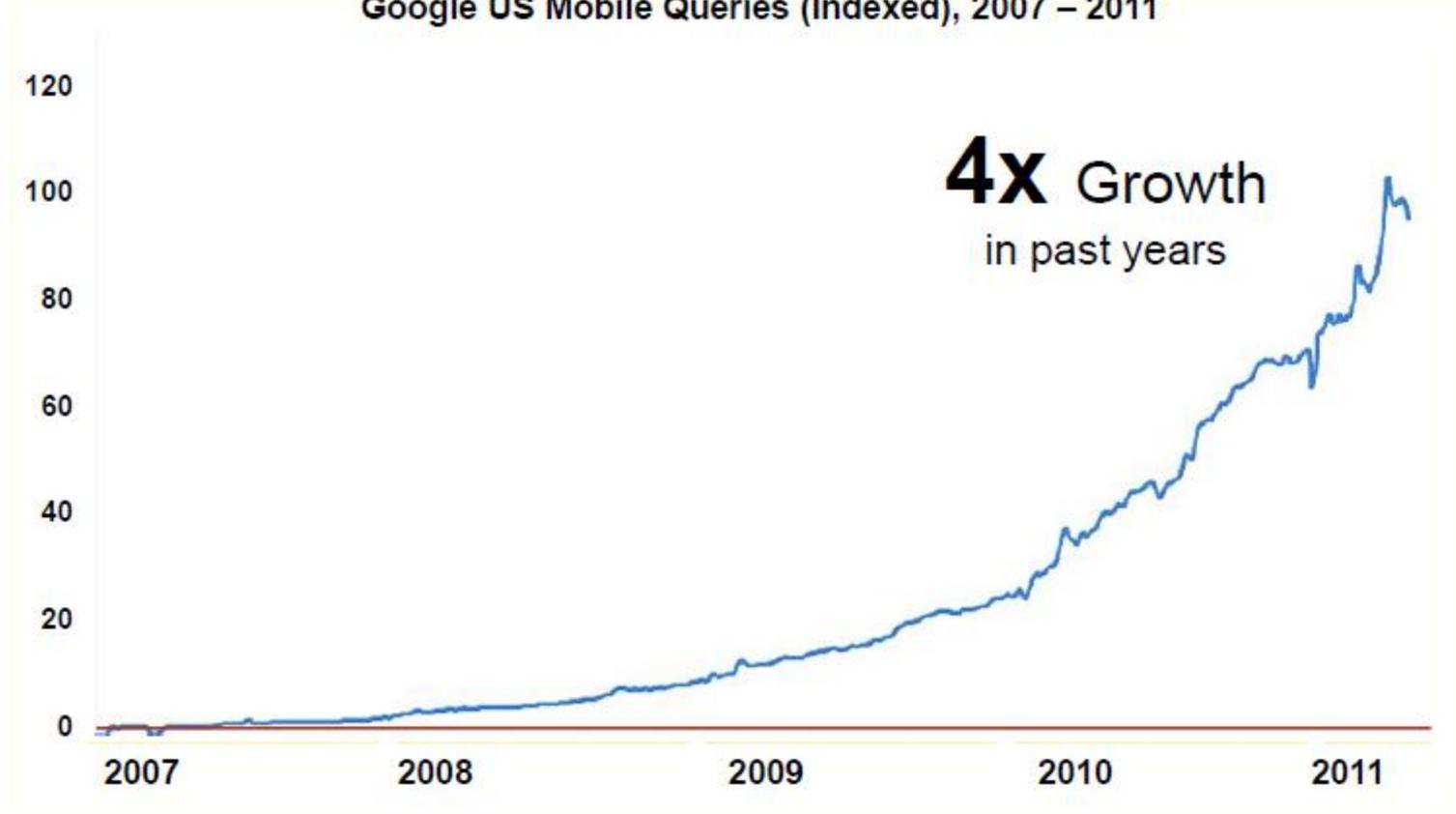
Mobile is "Always On"



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KP CB Mobile Search – Growing Rapidly

Google US Mobile Queries (Indexed), 2007 – 2011

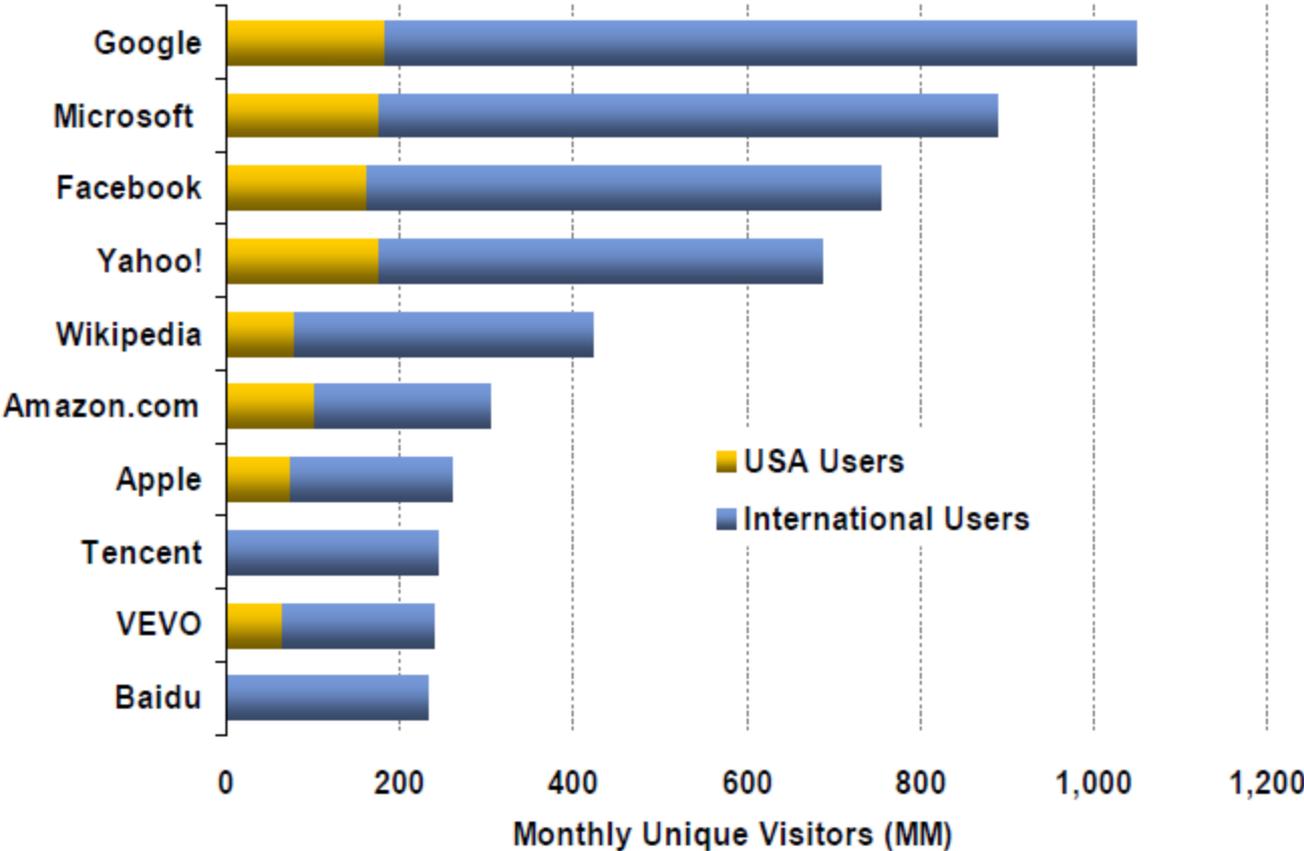


Source: Google.



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Top 10 Internet Properties by Global Monthly Unique Visitors, 8/11



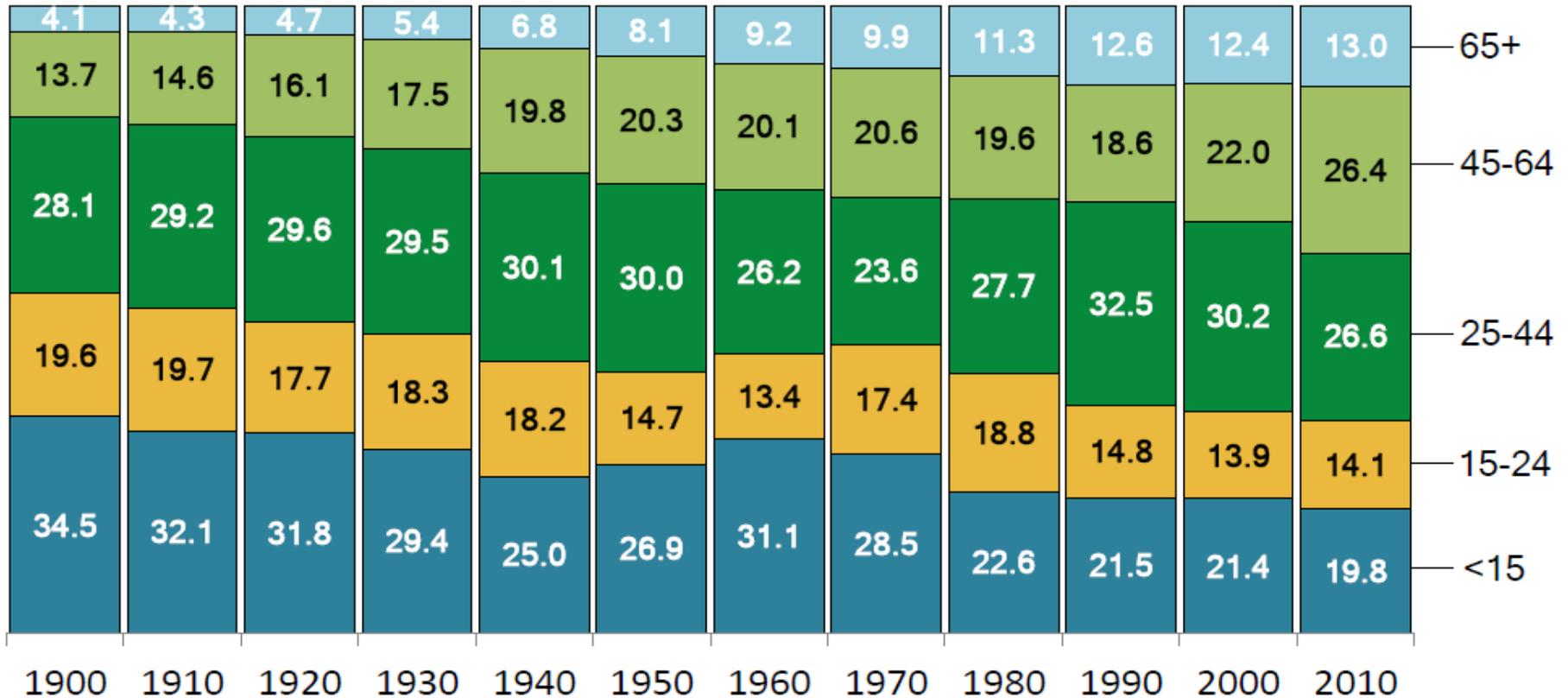
Source: comScore Global, 8/11.



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Aging is Not Distributed Equally in the U.S.

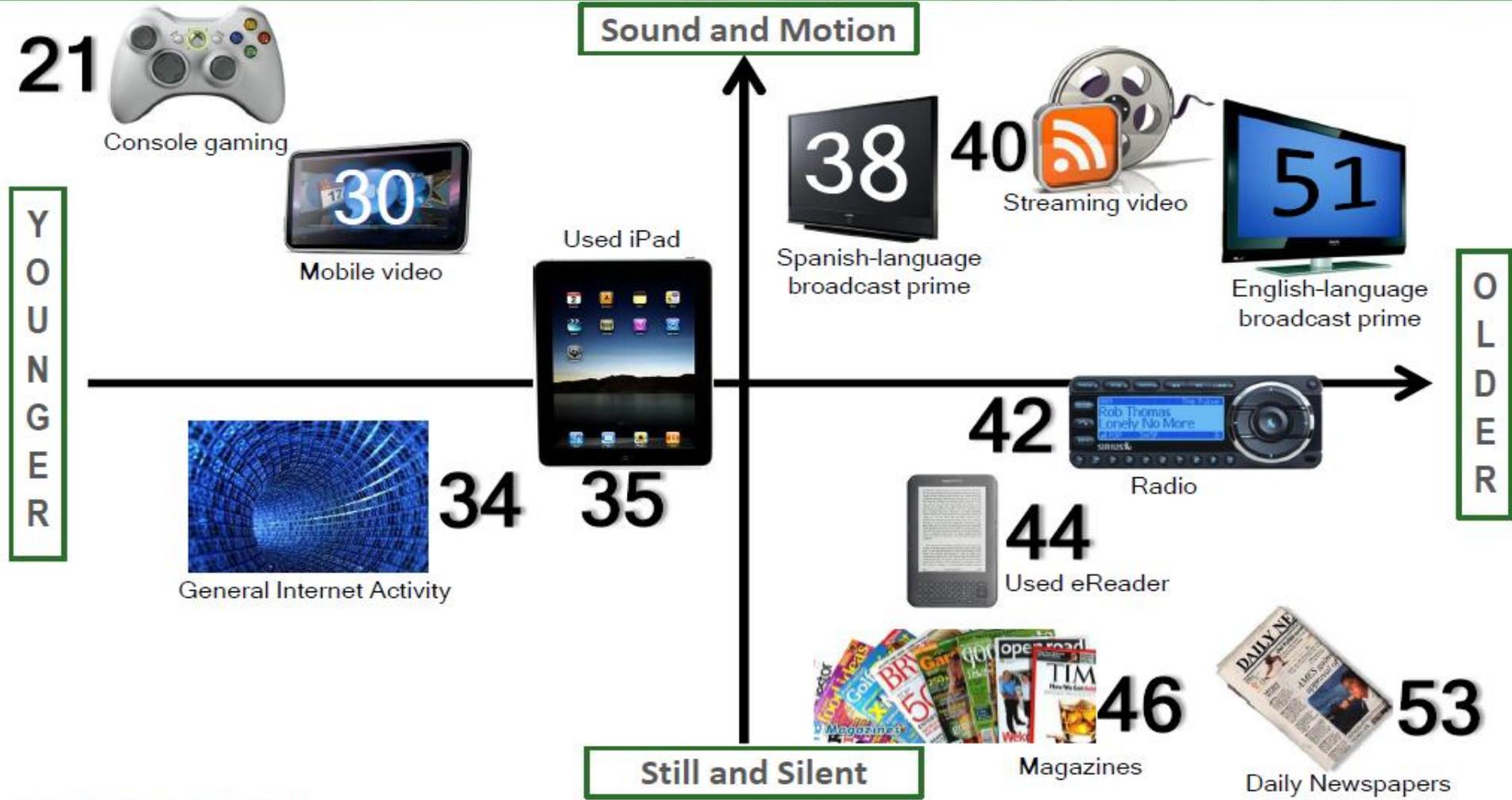
- 45-64 year olds (baby boomers) are the fastest growing age group





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Median Ages of Various Media Activities



Sources: Nielsen, ComScore, Arbitron, MRI



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Online

The median age of internet users is close to that of the population

- Falls into the "chronological" bucket, as we live in a connected age (three quarters of U.S. homes have access)
- Sites like Google, AOL, ebay, and even Facebook are right in line with the national median, indicating usage across age groups



34

General Internet Activity



Aol. 38



36



32



37

ebay 38



41

Google

36

Linked in

44



38



32



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Mobile

Mobile phones are a fact of life (over 90 percent of Americans have them)

- Overall, business applications lead to an older user base relative to the population
- Smartphone user profile is more balanced, only slightly younger than the U.S. median age
- iPad users tend to be slightly younger than competing tablets
- eReaders are the oldest-skewing mobile device, indicating more use among Boomers and retirees



Total Mobile Universe (13+)

43



Smartphone Users

35



iPad Owners

35



Other Tablets

39



eReader Users

44



Scanned QR Code

32



Accessed Social Media Site Almost Every Day



30



Downloaded App

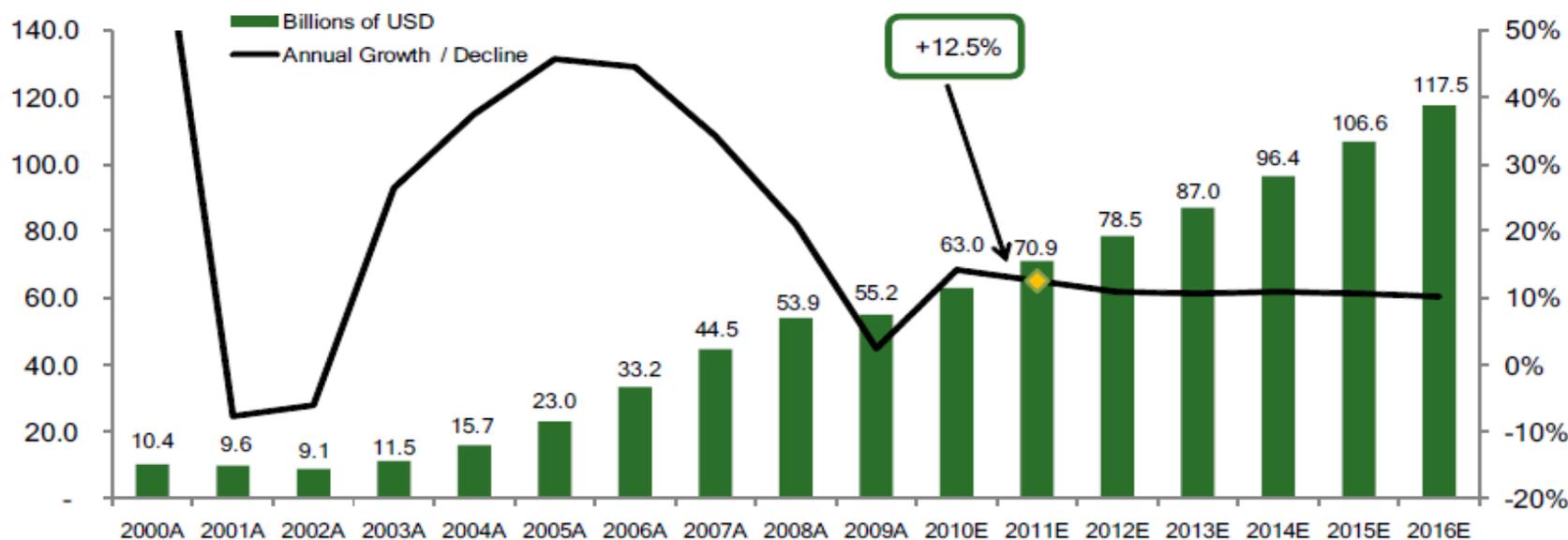
32



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INTERNET

Total Internet Advertising Forecast (in Billions of Constant USD)



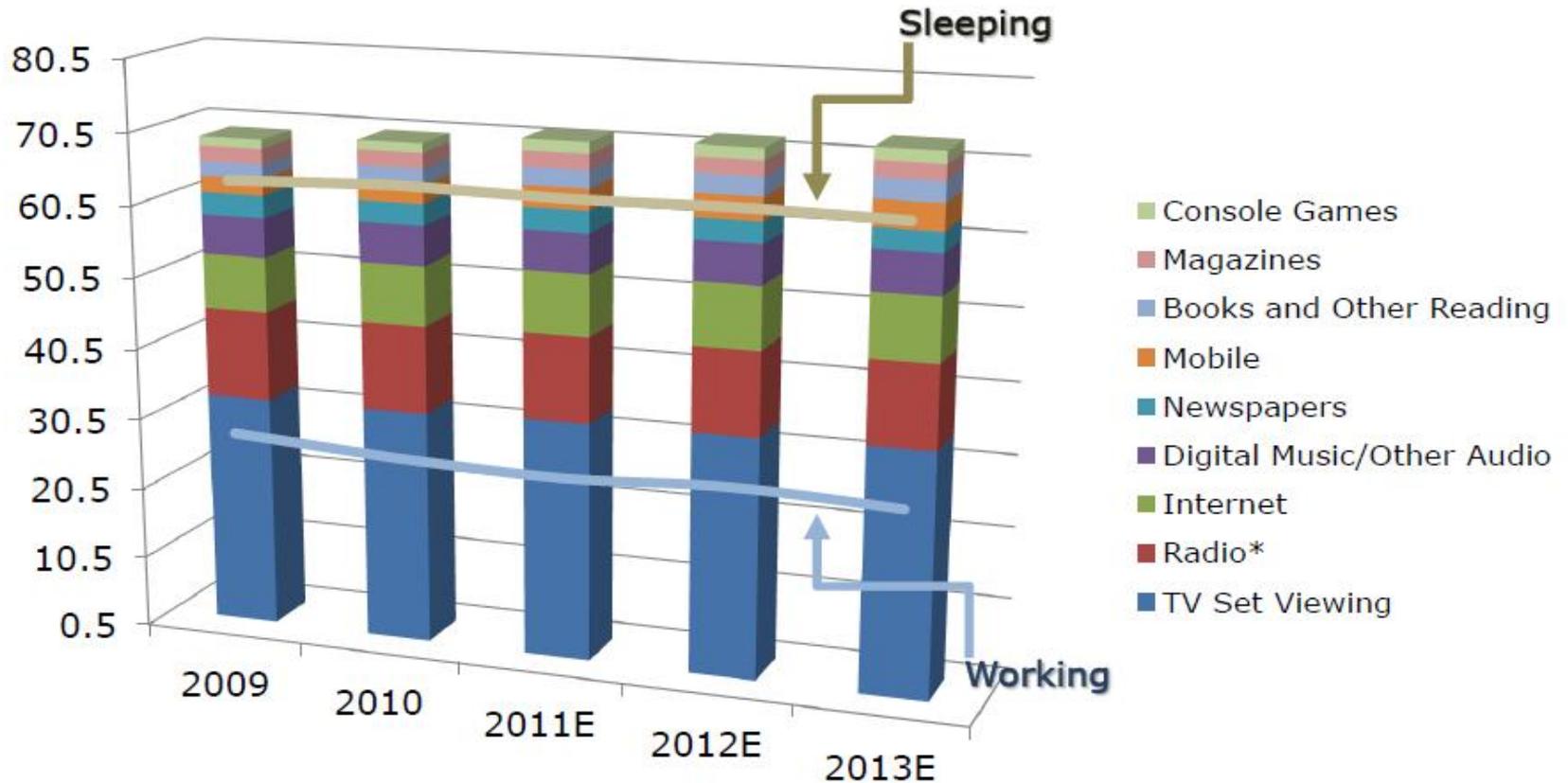


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Automotive and the Media

Americans Spend More Time with Media Than They Do Working or Sleeping

Hours Per Week – U.S. Adults



Source: MAGNAGLOBAL Projections based on Syndicated U.S. Data
 Sleep and work data from the Bureau of Labor Statistics Time Use Study
 *Includes Satellite

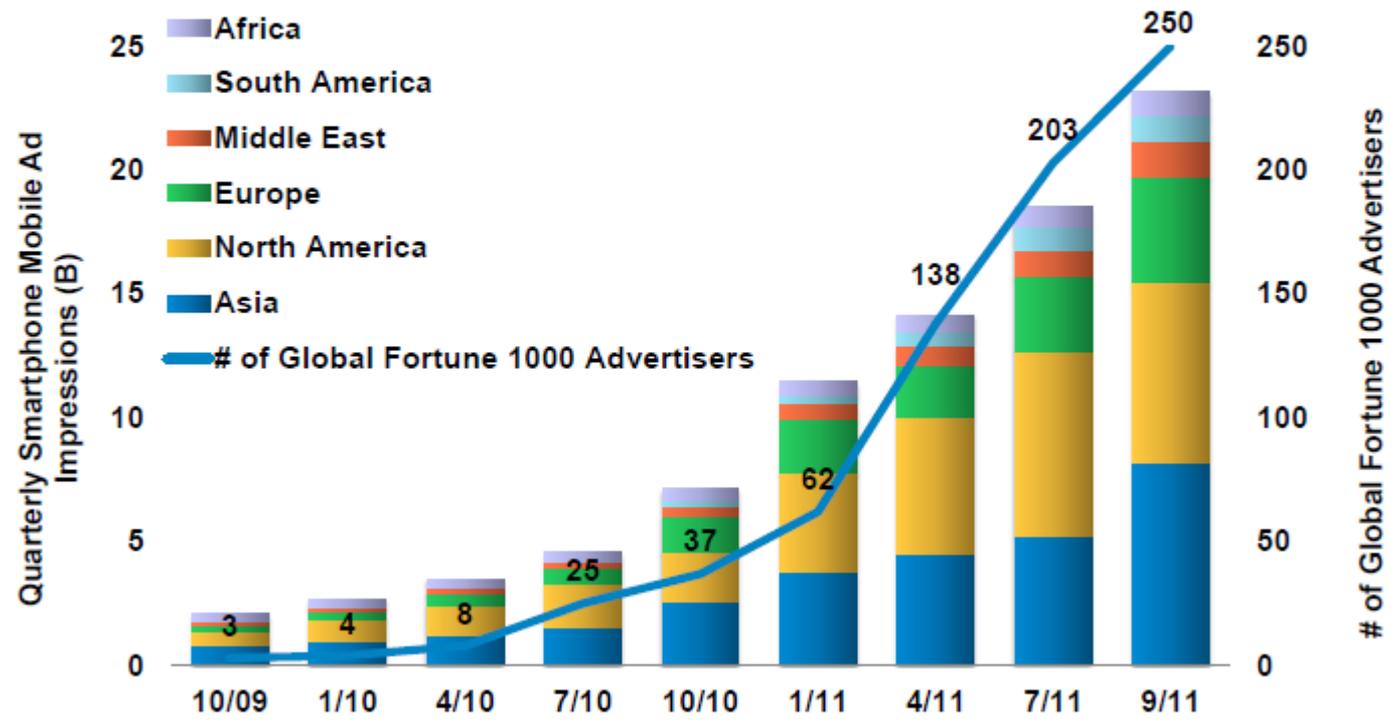
Investments in Mobile Advertising



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KP CB Mobile Advertising – Ramping Quickly in all Geographies

InMobi – # of Fortune 1000 Companies Launching Mobile Ad Campaigns & Quarterly Smartphone Ad Impressions, 10/09-9/11



Source: InMobi.

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DIGITAL SOCIAL PLATFORMS

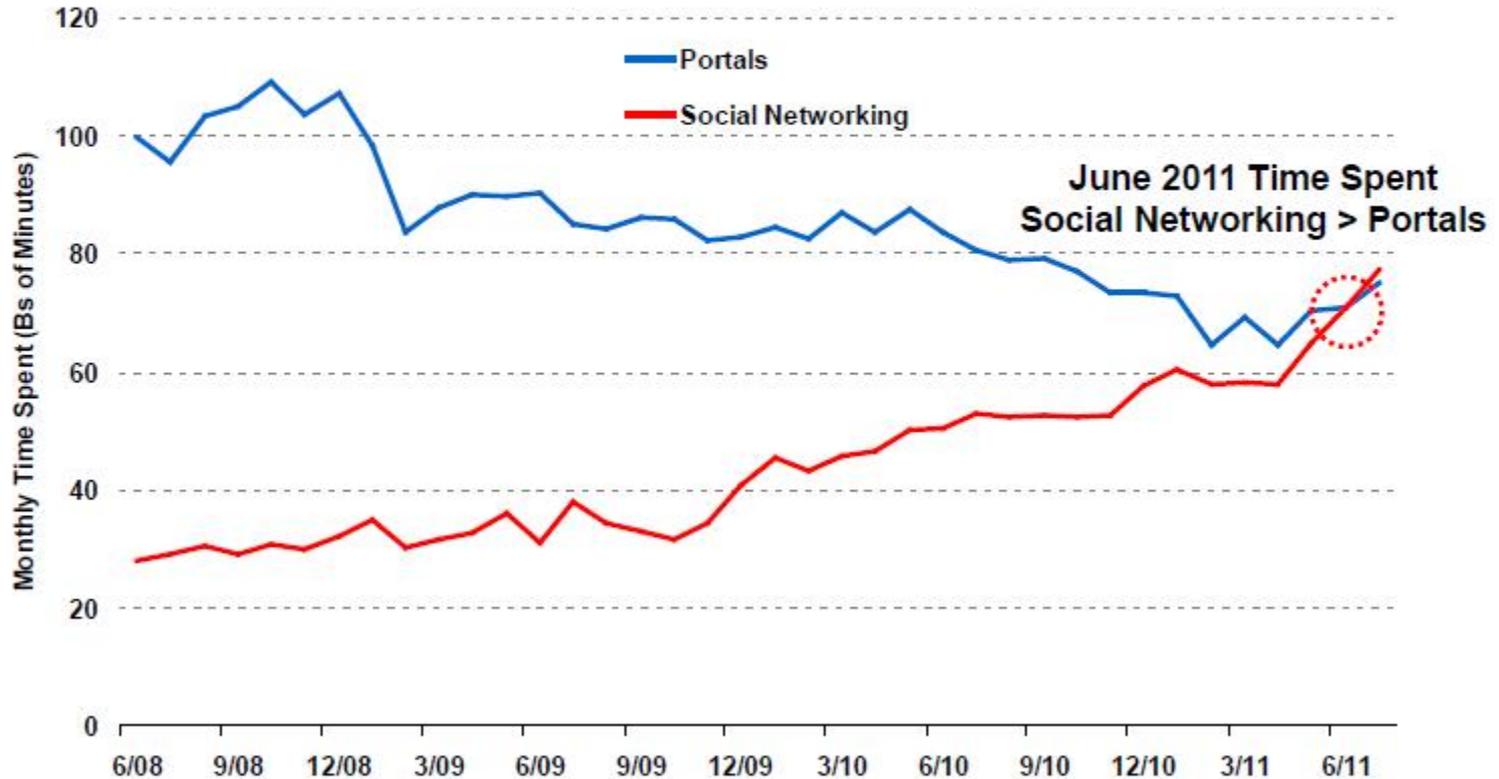


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Time Spent on Social Networking Sites Surpassed Portals, June 2011, USA

USA Monthly Time Spent, Portals vs. Social Networking Sites, 6/08 – 7/11



Source: comScore Media Metrix USA panel-only data.

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People are tweeting 140MM times a day



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- **25 billion** tweets in 2010
- **1 billion** tweets sent a week
- **155 million** tweets daily
- **177 million** tweets sent on March 11, 2011





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chrysler 200

Search

Browse

Movies

Upload

Create Account

Sign In

Search results for chrysler 200

Sort by: Relevance

About 5,830 results

Filter & Explore

200

motorcity casino

chrysler group llc

chrysler pentas...

greater los ang...

fox theatre

chrysler town a...

dodge avenger



Chrysler Eminem Super Bowl Commercial - Imported From Detroit

The Chrysler 200 has arrived. Imported from Detroit.

by [chrysler](#) | 6 months ago | 12,380,686 views

HD



2011 Chrysler 200 Limited - First Test

There is no question the Chrysler 200 is a better car than the Sebring it replaces, but erasing that memory was the easy part. To become a serious ...

by [motortrend](#) | 7 months ago | 92,126 views

HD



First Drive 2011 Chrysler 200: The company reinvents and renames the Sebring

(www.TFLcar.com) Chrysler reinvents and renames the Sebring and builds a European flavored small sedan now called the Chrysler 200

by [romanmicagearguy](#) | 8 months ago | 43,159 views

HD



Chrysler 200 Head to Head

The new 2011 Chrysler 200 is compared directly to the Chevy Malibu and the Ford Fusion.

by [chrysler](#) | 8 months ago | 127,213 views

Featured Videos



2011 Chrysler 200

From the 2010 Los Angeles Auto Show, Cars.com's Mike Hanley takes ...

by [Carscom](#) | 30,723 views



2011 KIA Optima EX vs. 2011 Chrysler 200 car

(www.TFLcar.com) Every car has something about it that makes it spec...

by [romanmicagearguy](#) | 22,966 views



2011 Chrysler 200 - Los Angeles Auto Show

FOR MORE AUTO SHOW VIDEOS & NEWS VISIT: www.kbb.com Intent on rais...

by [kbb](#) | 20,731 views

40 hours of video uploaded to YouTube every minute ...

Facebook is Global



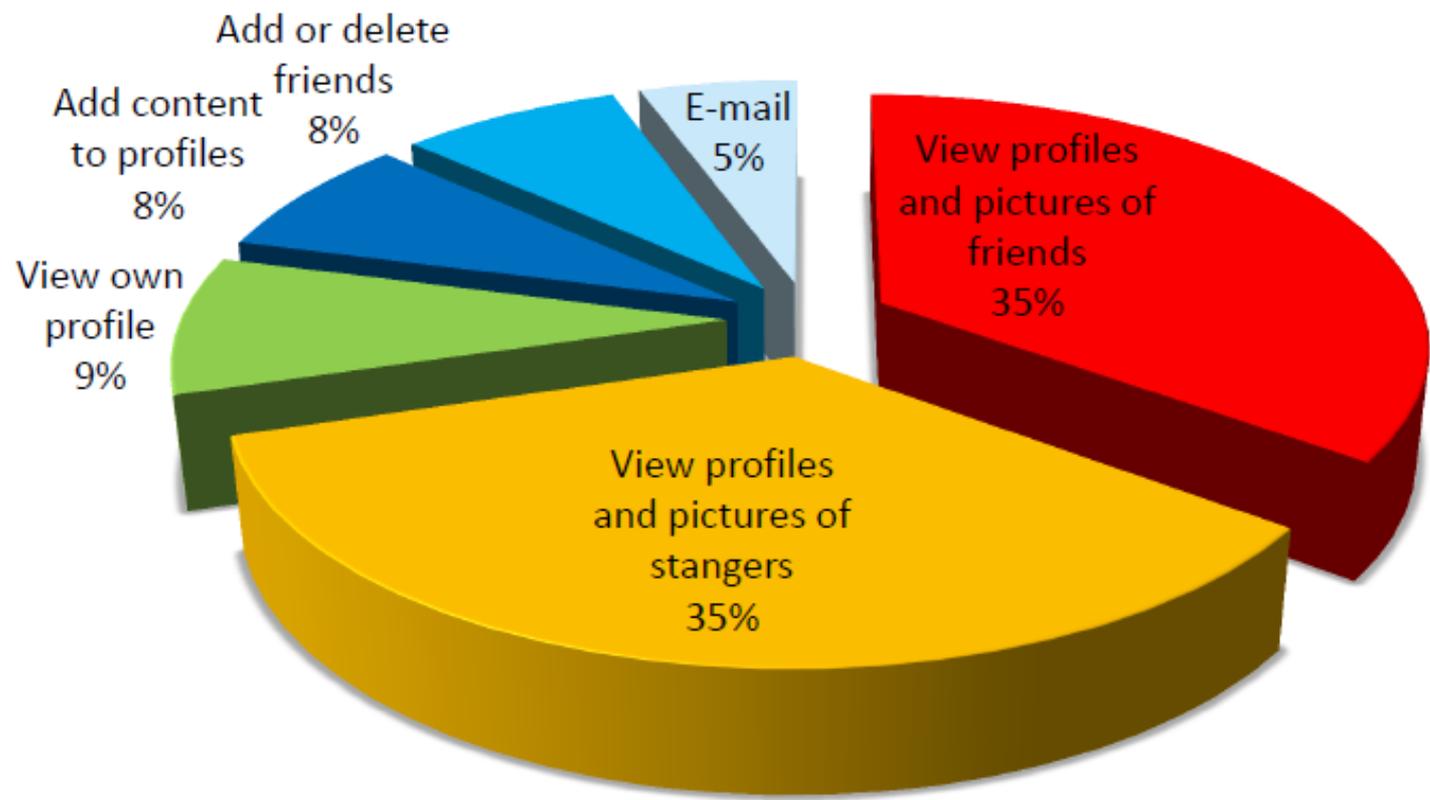
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- **800 million** global unique users
- **750 million** photos uploaded to FB Jan 1-4 2011
- **32 minutes** per visit
- **700 billion minutes** per month





What do people do on on-line social networks



Source: Harvard Business School: Digital Marketing

Percentages of all unique action clicks excluding navigation, platform and IM

Digital Social Gaming



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- People used to spend \$60 on games, now it's \$60 in games
- 40% of FB time is spent playing games

300MM people playing Zynga games

Digital Coupon- Future?



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GROUPON Featured Deal How It Works

Santa Cruz

 Get Deals By Email +

Oh no... You're too late for this Groupon! Sign up for our daily email so you never miss another Groupon!

\$6 for One Ticket to "The Lincoln Lawyer," Starring Matthew McConaughey

"The Lincoln Lawyer" Online Deal

\$6 No Longer Available

Value	Discount	You Save
\$13	54%	\$7

Buy it for a friend!

This deal ended at: 11:59PM

- GROUPON/LS launched in 2009
- 1.2b 2010 rev.
- 1/3 international revenues
- 90% of the 40k people who bought this deal had not heard of the film before

GROUPON & Living Social 200MM Subs...



Internet-Connected TV LG & Toyota



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Cross-platform media consumption is not a zero sum game



- Rich content
- Best viewing environment



- User control
- Interactivity



- Portability

- Each platform offers unique benefits, strengths, advantages
- As a result, user consumption on these platforms is not mutually-exclusive
- A combination of all platforms enhances performance and helps achieve better desired results





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Consumers look to the “best screen available” to consume media



- TV time spent remains at an all time high
- Live TV leads in share of usage across all demos
- DVR usage is small but growing



- Online video consumption increasing; usage is up substantially
- Short form video sites make up majority of online video usage
- Half of video consumed is at the workplace



- The number of mobile video users is growing
- Rise of smart phone driving increase in mobile video consumption



- Heavy internet users are heavy TV viewers – and visa versa
- Communicating across multiple platforms enhances impact

IMPORTED FROM DETROIT



Chrysler

chrysler's Channel

Subscribe

Uploads

Favorites

Playlists



Info Favorite Share Playlists Flag

Chrysler Eminem Super Bowl Commercial - Imported From Detroit

From [chrysler](#) | February 05, 2011 | 6,966,893 views

The Chrysler 200 has arrived. Imported from Detroit.



Chrysler 'Game On' Blogger Road Trip
8 hours ago
[more info](#)



Chrysler 200
3 days ago
[more info](#)



2010 L.A. Auto Show
2 months ago
[more info](#)



Chrysler Safety
4 months ago
[more info](#)



Town & Country
2 months ago
[more info](#)



Spring Fest 5
6 months ago
[more info](#)



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- History was made Sunday night on FOX when SUPER BOWL XLV averaged 111.0 million viewers to become the most-watched program in the history of American television.
- Super Bowl XLV averaged a 46.0/69 HH rating nationally, tying it for the highest Super Bowl rating in 25 years
 - 47.4M were adults age 25-54
- By 9:30pm total viewership increased to 117.2 million viewers, the largest audience ever for any portion of a Super Bowl.



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Press Comments

“What Politicians Can Learn From Chrysler Ads...The reason Chrysler’s 2 min Super Bowl Ad is getting so much buzz today isn’t just because it had Eminem– or iconic monuments from a once glorious downtown Detroit. It’s because it had a story of hope and redemption”. abcnews.com



“Eminem Praised for Chrysler Super Bowl Ad, Advertising experts says Rapper Appears Really Authentic...the spot did a good job coming up with a way to reposition Chrysler.. He’s authentic to a younger generation, which is what Chrysler needs. The toughest demo for them is not grandmothers, but younger kids who already listen to Eminem and might otherwise buy foreign cars”. MTV.com



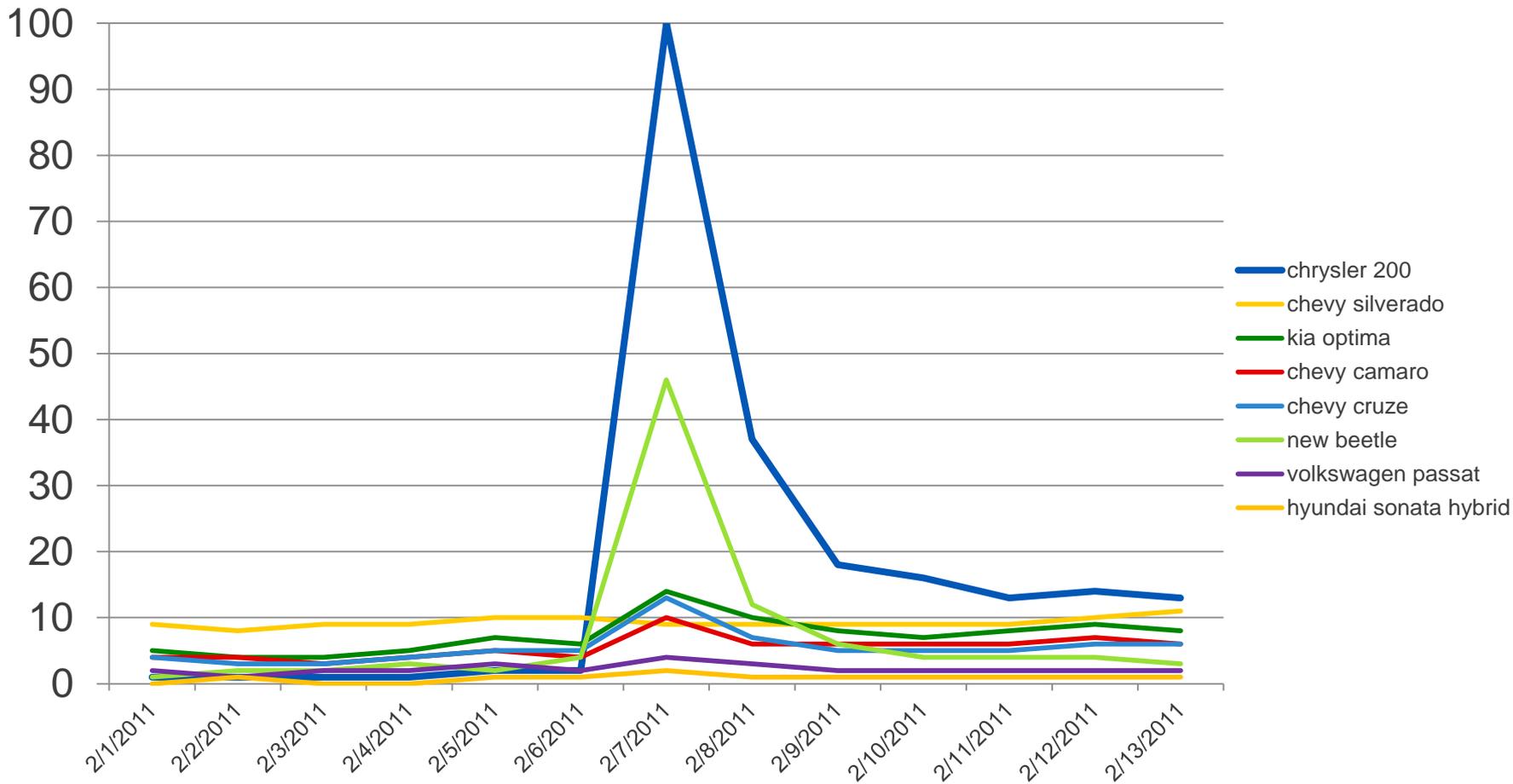
“Super Bowl Ad Stories: Chrysler, Eminem Break an Awkward Silence in Detroit”. Fast Company



...More Than any Other Super Bowl Advertised Vehicle

Search Interest Growth - Google

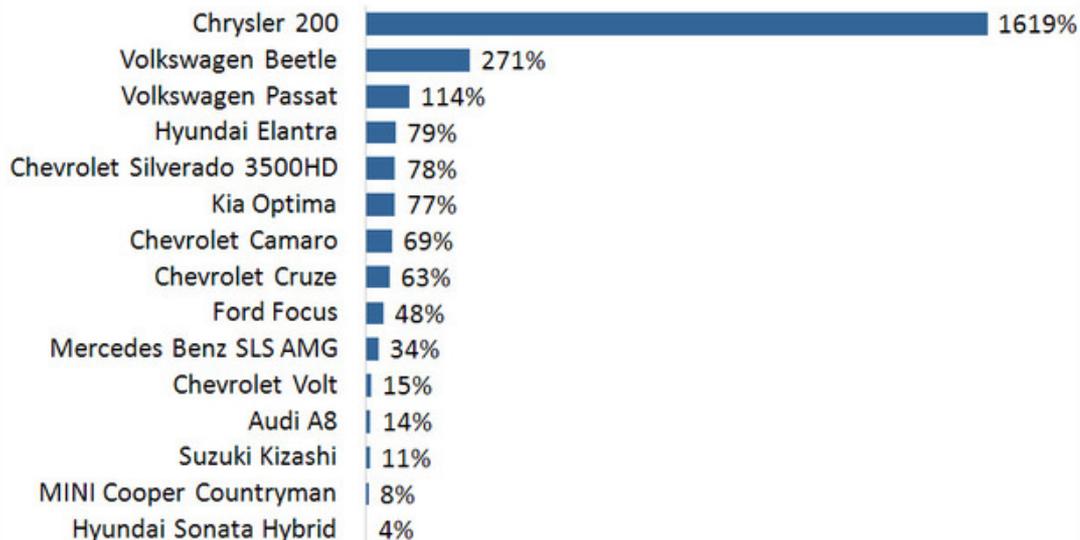
Feb 1 – Feb 13, 2011



Source: Google Insights For Search

Search Interest Drives Vehicle Consideration

Vehicle Consideration Increase on Edmunds.com:
The Morning After the Super Bowl



Source: AutoObserver.com © Edmunds.com, Inc.

Consideration Increase Following Super Bowl Ads

Model	Lift in Consideration	Notes
Chrysler 200	463%	
Chevrolet Silverado 3500HD	143%	
Chrysler 300	100%	No Advertising
Volkswagen New Beetle	79%	
Volkswagen Passat	70%	
Hyundai Sonata Hybrid	44%	
Hyundai Elantra	39%	
Kia Optima	31%	
Chevrolet Cruze	25%	
Chevrolet Camaro	23%	
Ford Focus	14%	Pre-Game
Suzuki Kizashi	9%	Regional Only
Mercedes-Benz SLS AMG	9%	
Hyundai Sonata	3%	No Advertising
BMW X3	2%	
Chevrolet Silverado 2500HD	0%	
MINI Cooper Countryman	0%	
Kia Soul	0%	Pre-Game
Audi A8	0%	
Chevrolet Volt	0%	

Source: AutoObserver.com © Edmunds.com, Inc.

WATCH, VOTE AND SHARE
YOUR FAVORITE 2011 SUPER BOWL® COMMERCIALS

The First 24 Hours:

Via YouTube, our Chrysler 200 spot has been viewed more than the Top 3 Chevy spots...COMBINED.



= 4,079,611



+



+



= 2,373,028



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We Have The 2nd Most Viewed Video On YouTube



Search

Browse

Upload

Videos

Music

Shows

Movies

Trailers

Store

YouTube Charts

Most Viewed Videos

Today

in

All categories



1

Christina Aguilera Wrong Lyrics Messed Up USA N...
Wrong Lyrics Christina Aguilera Messed up the U...
by ronsterronbone | 23 hours ago | 3,553,776 views



2

Chrysler Eminem Super Bowl Commercial - Importe...
The Chrysler 200 has arrived. Imported from Det...
by chrysler | 2 days ago | 1,224,680 views



3

Rally 2 Ronde Andora 5-6 Febbraio 2011 Shakedow...
2 RONDE DI ANDORA La sfida tra i piloti da r...
by pierluigibalestra | 2 days ago | 819,354 views



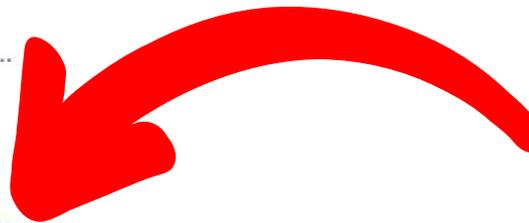
4

Britney Spears - "Hold It Against Me" Teaser #2
Get "Hold It Against Me" now on iTunes: http://...
by BritneySpears | 2 days ago | 765,111 views



5

"Start Again" - Sam Tsui
"Start Again" by Sam Tsui! Enjoy guys :) Downl...
by KurtHugoSchneider | 1 day ago | 695,208 views



That's globally...

and behind only the
Christina Aguilera
botched anthem

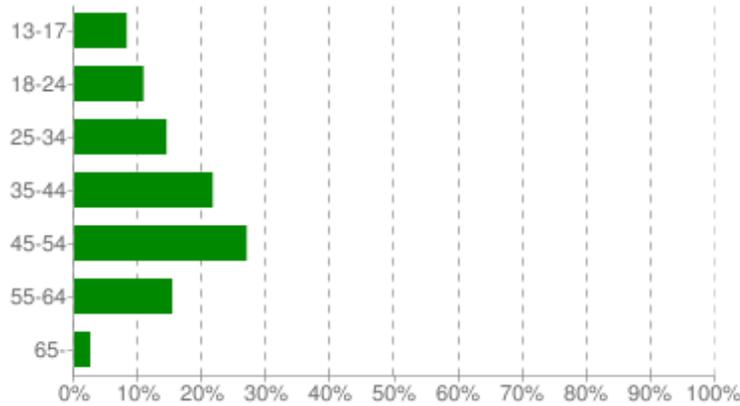
The Ad Covers Key Audience Demographics



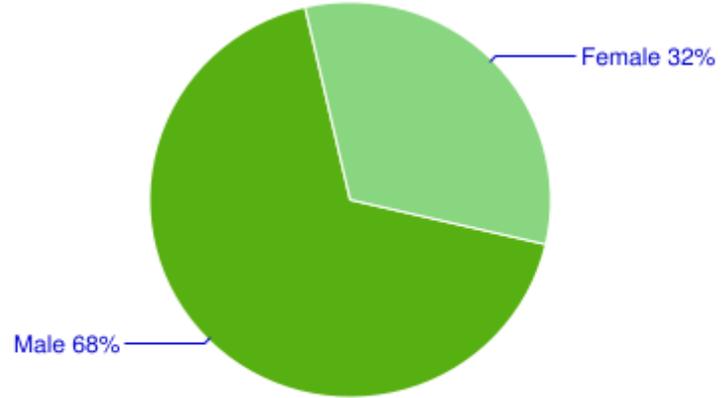
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Demographics

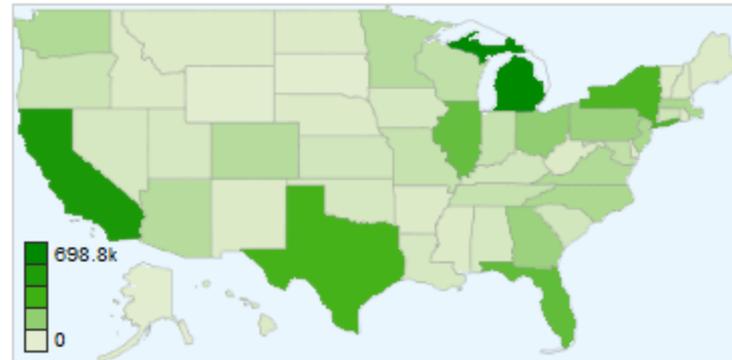
Age ranges for: All Male Female



Genders for all age groups



Words most used in comments on this video



Mobile Devices Ranked The Third Largest Traffic Source For YouTube Views



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15% views came via a mobile device (in first 24 hrs.)





- Search is up 500% Pre to Post game
- Click throughs are up 8,000%

The Google logo, featuring the word "Google" in its signature multi-colored font (blue, red, yellow, blue, green, red) with a trademark symbol (TM) to the right.

Social Media Activity During the Hour the Commercial Aired



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- “Born of Fire” spot most widely discussed Super Bowl Ad online, generating 20K tweets and over 40K mentions within the online space overall.
- The video was shared on Facebook over 145K times with over 900 “likes”
- Over 75% of all comments were positive.
- Activity is growing so rapid – New metrics available COB Today



YESTERDAY'S THINKING

Shopping is an individual process

**Shopping/decision-making is a chore,
a mere means to an end**

**The decision-making process is rational
and takes time to make the right decision**

**The Internet overwhelms people
with too much information**

- Digital Information Highway
- Digital Asymmetrical
- Digital DNA
- Digital Predictability
- Mobile Engagement
- Digital Localisation

Emerging Concepts

**Shoppers collaborate with other “players”
(consumers and brands)**

**Consumers are intrigued by the paths they
discover to being smart and savvy shoppers**

**A vast network is employed to steer shoppers
toward the right decision**

**The Internet helps consumers navigate their
choices, resulting in faster, less impulsive
decision-making**



THIS IS THE MOTOR CITY.
AND THIS IS WHAT WE DO.

Thank you!



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Appendix



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Consumer attention is fragmenting ...

1. All media is mobile → Always On
2. Location based services are growing rapidly and approaching real scale (Foursquare, Gowalla, Shopkick, etc.)
3. Groupon and LivingSocial are increasingly driving local advertising business
4. Photo sharing helps consumers share moments and products... at scale (Instagram, PicPlz)
5. Social gaming is both mass, and increasingly ad friendly (Zynga, Angry Birds)

... rapidly to scaled audiences

7. Social commerce is not a fad (FB Deals > \$100MM first week)
8. Crowdsourced reviews drive business (Yelp, Angie's List, Metacritic/Flixster)
9. Geo-fenced opt-in mobile messaging is becoming commonplace and useful to retailers
10. Targeting by location, interest, transaction history, and other social signals is here today
11. Interest graphs are replacing social graphs when it comes reaching consumers with products



“Data-isation”

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Social Integration TV Experience Concept

The inclusion of social features is not a question of “if” or “if not”. The question is more how we can expand beyond the standards of “like” and “share” in order to enrich the television experience. It is also important that the user can always decide how deep an interaction with social networks gets.

The user can see if friends are watching a certain program and can even watch it together with them. He can see live video pictures that allow him to share his reaction to what happens immediately. It’s just like being together – no matter how far apart they are in physical space.



Click image for link.



Next Generation Targeting: Persuasion Profiling

Today, most recommendation and targeting systems focus on the products: Commerce sites analyze our consumption patterns and use that info to figure out that, say, viewers of *Iron Man* also watch *The Dark Knight*. But new work by Maurits Kaptein and Dean Eckles, doctoral students in communications at Stanford University, suggests there’s another factor that can be brought into play. **Retailers could not only personalize which products are shown, they could personalize the way they’re pitched, too.** “Some book buyers felt comforted by the fact that an expert reviewer vouched for their intended product. Others preferred to go with the most popular title or a money-saving deal. Still others responded best to being hit over the head with a simple message (“The *Hunger Games* is a fun, fast read!”). And certain pitches backfire: While some people rush for a deal, others think discounts mean the merchandise is subpar. By eliminating persuasion styles that didn’t work on a particular individual, Kaptein and Eckles were able to increase the effectiveness of a recommendation by 30 to 40 percent.”



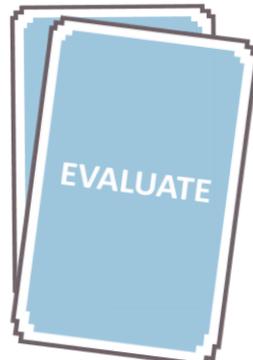
Click image for link



OFFLINE



- TV/Print Stories
- Salesperson



- Print Circulars and Coupons
- Physical Store



- Word of Mouth – With those who own or do not own product
- Used/Tested Out Product

DIGITAL

- Search Engines
- Consumer Portal Site
- Digital Articles
- **Video by Manufacturer/Experts**
- Reviews on a Brand Site
- Enthusiast/Consumer Report Site
- Brand /Retailer Site
- **Podcasts**

- **Mobile Coupons**
- **Barcode Reader**
- **Deal Collection emails**
- **Digital Coupon Sites**
- Auction Sites

- **Videos generated by Consumers**
- **Consumer Reviews**
- Chat Rooms/Message Boards
- **Blogs**
- **Discussed via Social Net Sites**
- **Company's Facebook Fan Page**

Implications



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OPPORTUNITY
AHEAD

- Marketers should be **contributors to the social ecosystem** by identifying the most trusted sources for consumers and becoming part of the conversation.
- **Create reward systems that deliver the “consumer win”** by making the consumer feel special – such as **tailoring deals to their expressed interests** and encourages viral sharing
- Marketers don’t necessarily need to be considered a consumer’s “friend,” but should leverage the right media to aid consumers – like expert reviews.
- Online sources influence purchases just as much, if not more, as offline sources so it’s important to **make sure your brand is part of the online dialogue**
- Leveraging brands as contributing members of 3rd party communities (e.g., fan pages, microsites, etc.) is a novel way for brands to offer a more personal and authentic view
- Consumers use discover tools most often when gathering information and narrowing down options, but your presence doesn’t need to be purely rational. It can and should delight emotionally.