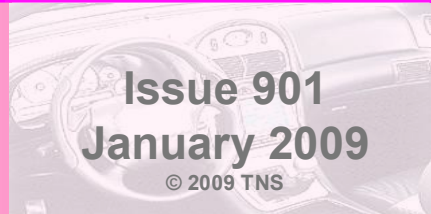




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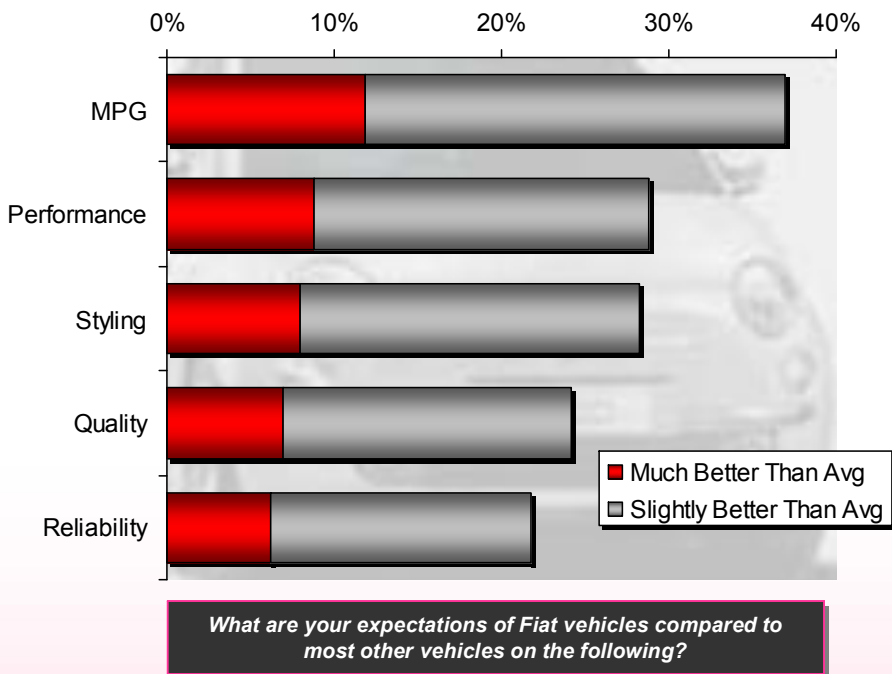
TNS.SENSESM AUTOMOTIVE



FIAT'S QUALITY IMAGE MAY NOT BE THE ACHILLES HEEL MANY EXPECTED



Fiat and Chrysler have announced a partnership that is likely to bring Fiat vehicles to the US market within the next 24 months. Some vehicles will carry one of the Chrysler LLC brands (Chrysler, Dodge, Jeep), while others may be badged as Fiats. TNS asked 2,500 US adults their **expectations of Fiat vehicles** to help frame the opportunities and challenges in bringing Fiat vehicles back to the US, recognizing lingering anecdotal concerns about Fiat quality.



Respondents' highest expectations of Fiat are on **fuel efficiency**, with nearly 40% expecting Fiat vehicles to get better gas mileage than the average vehicle. Only 10% (not shown) think Fiat vehicle mpg will be below average.

Consistent with the anecdotal evidence, the lowest expectations are around **quality and reliability**. However the share expecting Fiat reliability to be above average (22%) is the same as those expecting it to be below average (22%--not shown), which suggests earlier decades-old quality concerns are smaller today than some expected.

Fiat's best chance at success will be through quickly **quantifying and leveraging existing strengths** (such as mpg expectations) and pro-actively addressing challenges through everything from advertising to dealer training. This includes correctly **setting and managing expectations**. For example, if its vehicles are not more fuel efficient as many rival vehicles, Fiat risks lost sales from disappointed shoppers. Similar insights will also be valuable to help **decide which Fiat vehicles** should be sold as Chrysler, Dodge, or Jeep vehicles given the unique expectations for those brands (see the February and March 2008 *TNS.Sense Auto* newsletters for analyses of Chrysler brands).

TNS is the world's foremost provider of custom research and analysis, combining in-depth industry sector understanding with world-class expertise in the areas of innovation, communication, customer acquisition, and satisfaction & loyalty. For more on these results contact Lincoln Merrihew of TNS Business Solutions (Lincoln.Merrihew@tns-global.com) or Melanie Mumper of TNS Marketing (Melanie.Mumper@tns-global.com)