

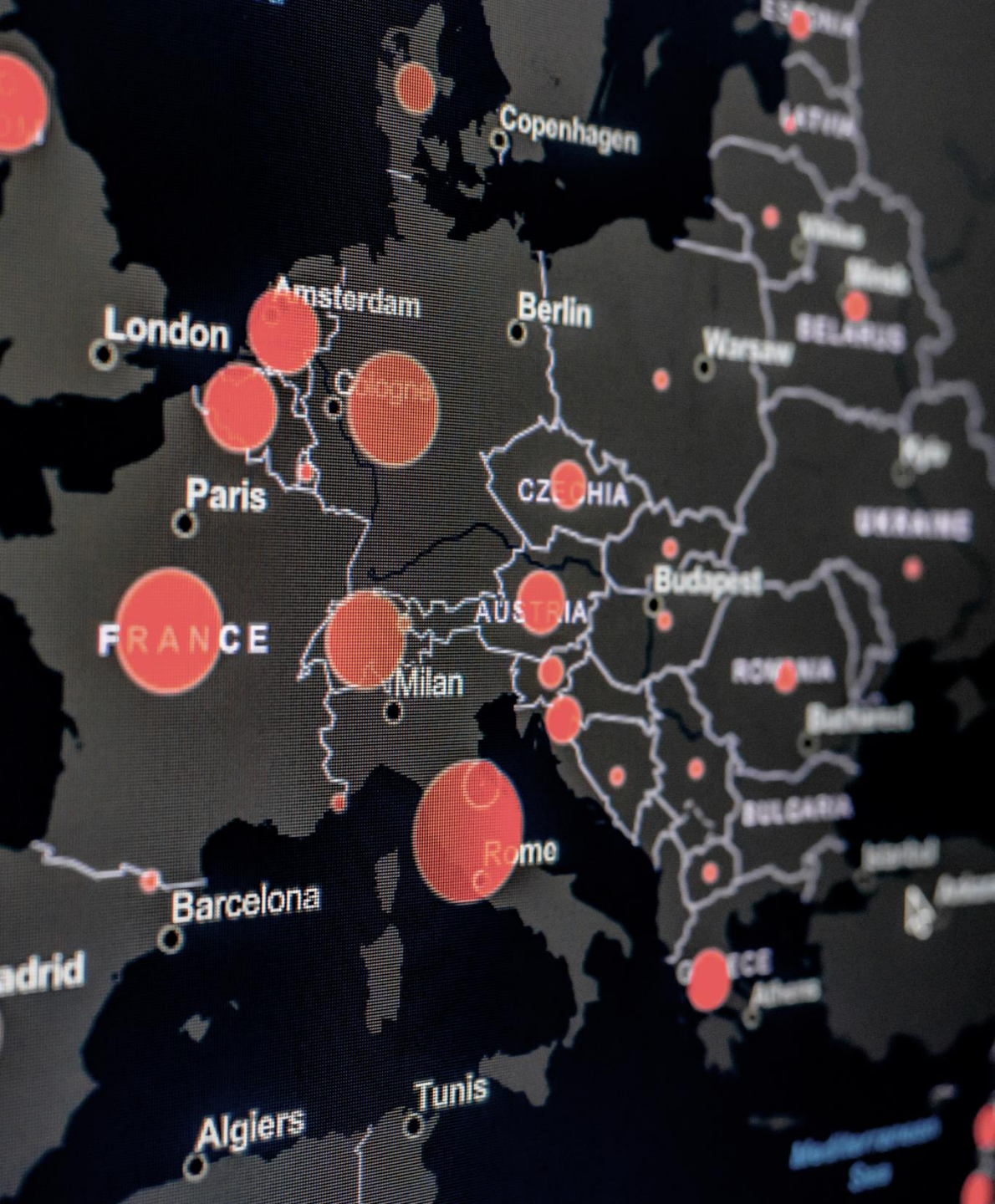
true[X]

COVID-19

Consumer Sentiment Research

Week 1

3.25.2020



Introduction

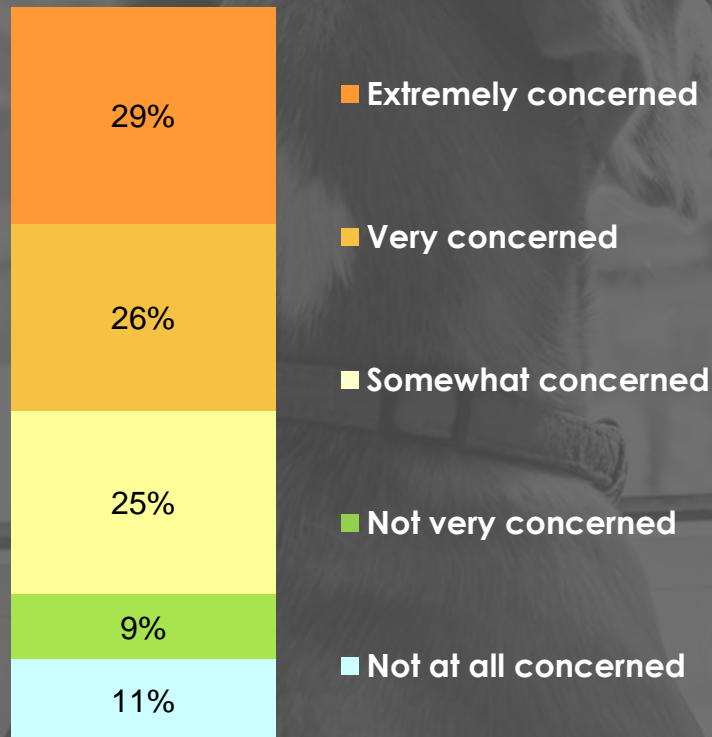
The COVID-19 pandemic is changing how we live, work, and make decisions. For the advertising industry, that means reassessing our relationship with consumers

Using our UP//LIFT survey technology built to assess the brand funnel impact of advertising campaigns, we're continually monitoring consumer sentiment and outlook in the wake of COVID-19 and what roles audiences want brands to play

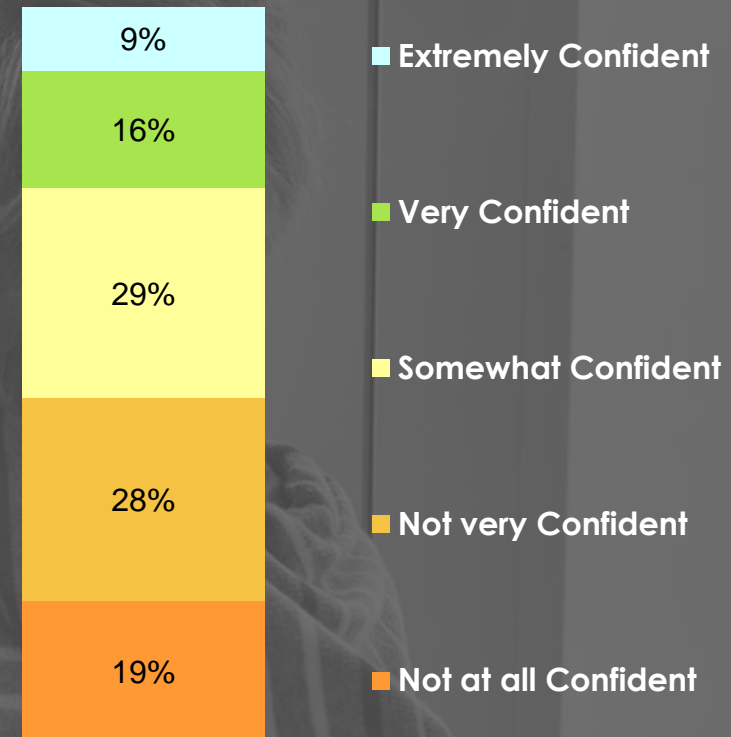
Concern & Uncertainty About The Future

Over half of respondents say they're very or extremely concerned about the health of their communities and about half express doubt that things will go back to normal soon

How are you feeling today about the health of your community?



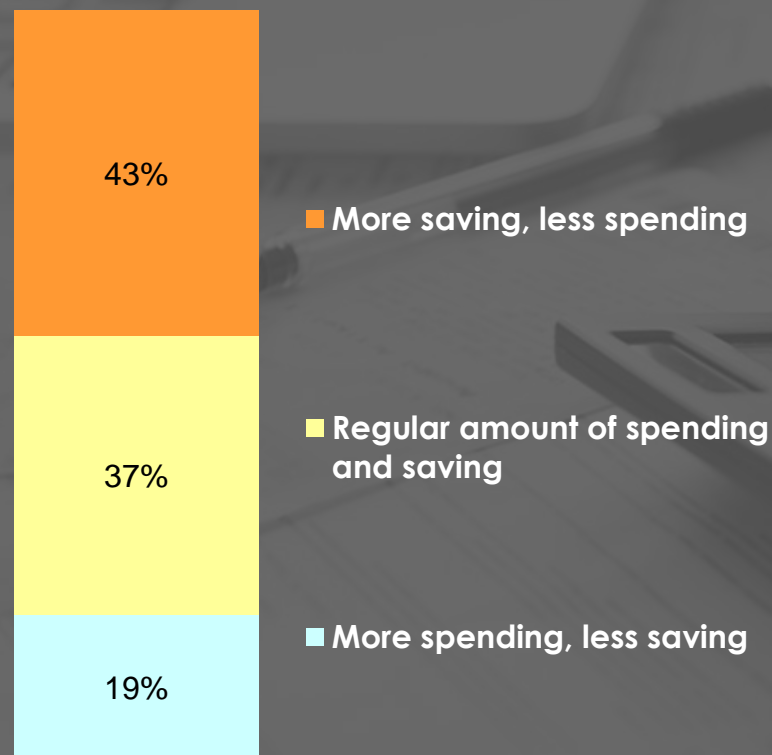
How confident are you that things will be normal next month?



Households Focus On Budgets & Delivery

Consumers are shifting their habits with over 40% reducing spending and focusing on saving during these uncertain times and over a third relying more on delivery than in-store shopping

Compared to six months ago, how are you spending vs. saving?



Compared to six months ago, how are you shopping today?



What Should Brand Advertisers Do?

Perhaps surprisingly, consumers aren't looking to brands to drop their prices amid the COVID-19 crisis. What they want is for brands to step up as community leaders and a force for good.

What should the primary focus of advertisers be right now?
(respondents select just one)



Source: true[X] network audience, utilizing an in-placement survey methodology across desktop devices, March 20, 2020, n=791

Methodology



Sample Demographics

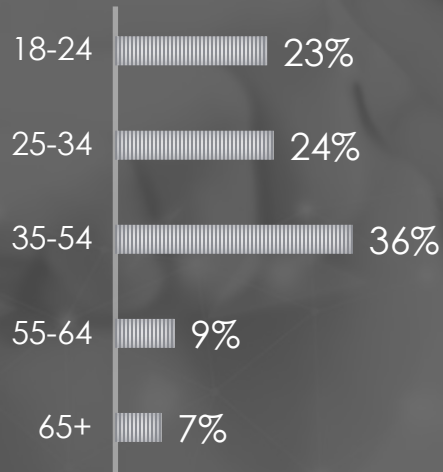
46%
male

54%
female

0.1%
non-binary



Age



Survey Experience

The survey aims to measure the impact of COVID-19 on the true[X] audience by randomly sampling user responses to key consumer sentiment questions week over week across the network

Responses are gathered via true[X]'s proprietary UP//LIFT survey technology, which offers users in the network a choice to answer a quick survey in exchange for skipping streaming TV commercial breaks, access to premium lifestyle content or gaming site credit

Sample responses are balanced to be demographically representative of the true[X] network as measured by ComScore Media Metrix

Network Audience Placements



Streaming Entertainment Channels



Lifestyle Sites



Gaming Sites



true[x] is a technology company building the next generation of advertising products and experiences for premium video.

Our mission is to provide the best advertising experience for consumers, the best monetization for premium publishers, and the best return for brand advertisers.

Across connected TV, mobile, and desktop we empower premium publishers to create experiences that allow them to serve the widest possible audience by optimizing consumers' time and attention, and delivering impactful results for advertisers. For brands and advertisers true[X] delivers on our true[ATTENTION] guarantee of effective, zero-waste, high-engagement ad experiences that drive measurable brand funnel impact.

Since our founding in 2007, we have been committed to advancing three core principles in our own products and in the broader advertising industry: quality, accountability, and transparency, driven by our core belief that all are necessary for ensuring a better consumer experience. Every decision we make is guided by a deep understanding of human attention.

true[X], an independently run subsidiary of Disney, is headquartered in Los Angeles and New York, with offices in Chicago, Seattle, Detroit, and San Francisco.