

Executive Summary - Results

Email survey sent to a cross-section of email subscribers in the USA and Canada.

Survey period: 8 – 15 July 2019.

Overall response rate was

Group 1 ([90% Mark Version](#)): 1.5% (i.e. 215,626 surveys sent with 3,309 responders). Group 1 results as of 11 July 2019

Group 2 ([10% Matt Version](#)): 2.0% (i.e. 8,343 surveys sent with 170 responders). Group 2 results as of 12 July 2019

Group 1 (90% Mark Version): <u>Demographics:</u> • 61% are over 60 years of age, 35-59 are around 34%, while 18-34 represents 5%. • 64% are female (36% male, 1% Other or Prefer not to Say) • Top 5 US states for American customers are California, Florida, Texas, New York, and Ohio • Top 3 Canadian provinces for Canadian customers are Ontario, British Columbia, Alberta <u>On using Nixplay:</u> • 65% Primarily use the Mobile App to use their Nixplay; 21% Use Web App • 34% Use the Web App as an alternative, followed by Remote (29%), Mobile App (27%) • 49% Use it to share general family photos, 31% photos of grandchildren, 6% old memories • 63% Own only 1 frame, 18% own 2 frames, and 11% own 3 frames per household • 63% know they can send videos via their mobile to their Nixplay; 37% do not know • When asked about improvements, most had nothing other than longer video, video upload via desktop, easier photo management experience	Group 2 (10% Matt Version): <u>Demographics:</u> • 75% are over 60 years of age, remainder under 60. • 61% are female (36% male, 3% Other or Prefer not to Say) • Top 5 US states for American customers are Pennsylvania, Massachusetts, Illinois, Florida, Washington State <u>On using Nixplay:</u> • 59% Primarily use the Mobile App to use their Nixplay; 27% Use Web App • 36% Use the Web App as an alternative, followed by Mobile App (32%), Remote (24%) • 50% Use it to share general family photos, 31% photos of grandchildren, 7% old memories • 65% Own only 1 frame, 15% own 2 frames, and 11% own 3 frames per household <u>On gifting and buying Nixplay:</u> • 55% received the frame as a gift; 41% bought their own frame; 4% don't own a Nixplay • 77% received it as a gift from their children, sons, or daughters; 7% from their spouse, wife or husband • 43% Purchased on Amazon, 18% from Shop, and 13% from both Amazon and Shop
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On gifting and buying Nixplay:

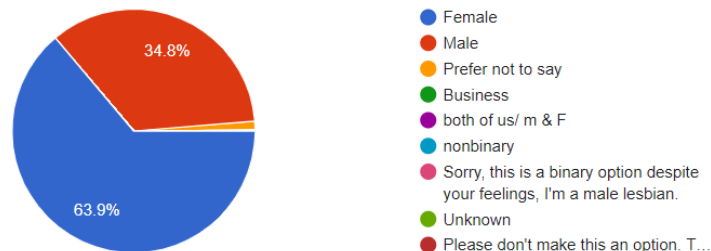
- 56% received the frame as a gift; 41% bought their own frame; 2% don't own a Nixplay
- 76% received it as a gift from their children, sons, or daughters; 9% from their spouse, wife or husband
- 43% Purchased on Amazon, 19% from Shop, and 11% from both Amazon and Shop

On Photo Print services:

- 26% do not use photo print services, 16.4% use it over 5 times/year, 16.0% just twice a year
- The top 3 in-store photo services are Walgreen's, Costco, CVS, while the top online services are Shutterfly and Snapfish. A good number of respondents also cited their home printer for printing
- Major reasons cited for using photo services are mostly around convenience, price, or quality
- However, the majority do not see any problems other than some better pricing or better print quality
- 66% select and order their prints using their desktop while 34% do it from a mobile app

Which best describes you?

3,309 responses



On online subscription services:

- 52% do not use online subscription-based services
- 63% determining on a case-by-case basis, 13% have no opinion while 15% prefer one-off payments

On Photo Print services:

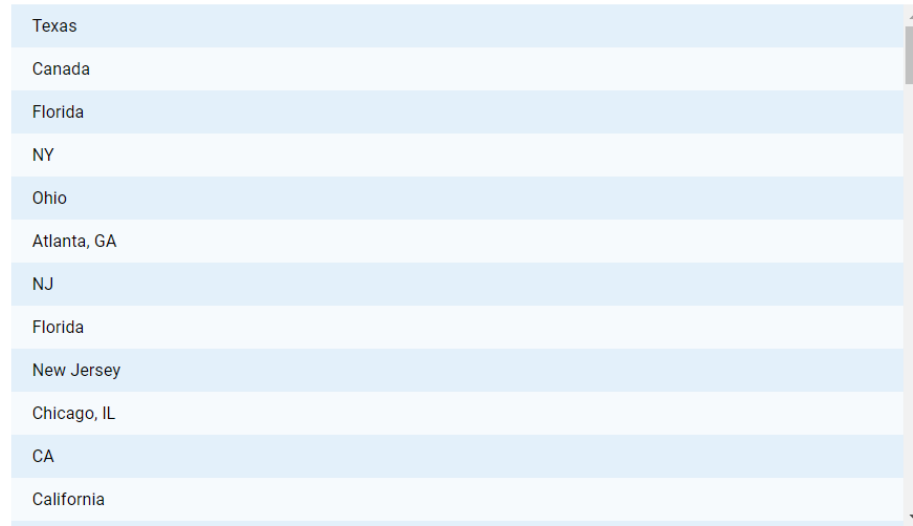
- 60% occasionally use store photo printing services while 34% do not print photos from a store
- Almost 50% sometimes or rarely use online print services while around 1/3rd have never used it
- 77% ordered photos from a website and 16% via mobile app
- The top 3 in-store photo services are Walgreen's, CVS, Walmart while the top online services are Shutterfly and Free Prints.

On proposed Nixplay subscription services:

- 62% would print photos stored on their Nixplay, but 72% would print it occasionally
- A simple majority would not subscribe for photo printing, to edit/improve their photos, or for unlimited photo cloud storage
- Top 3 Items interested for print are Photo Prints, Photo Books, Greeting Cards
- Top 3 Items for subscription services are for longer videos, video editing, additional storage for videos

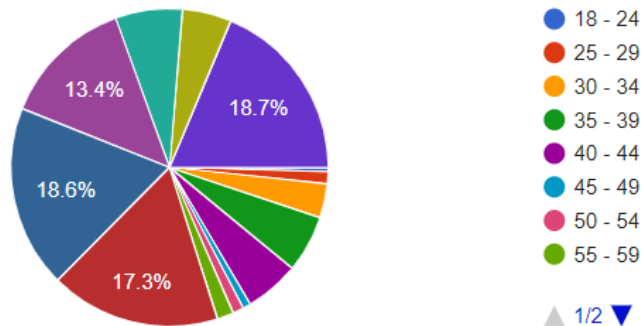
Which city and state do you live in?

3,309 responses



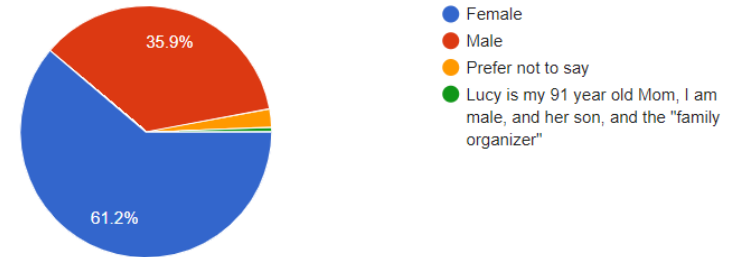
Which age group best describes you?

3,309 responses



Which best describes you?

170 responses



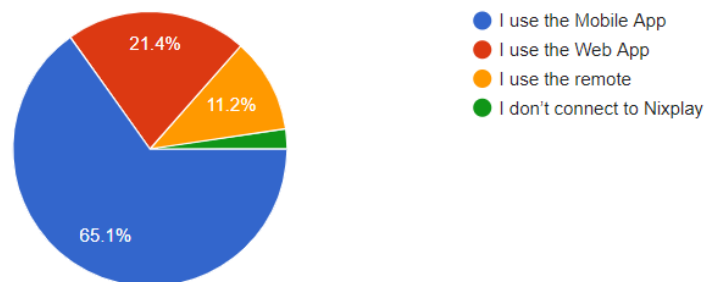
Which city and state do you live in?

170 responses



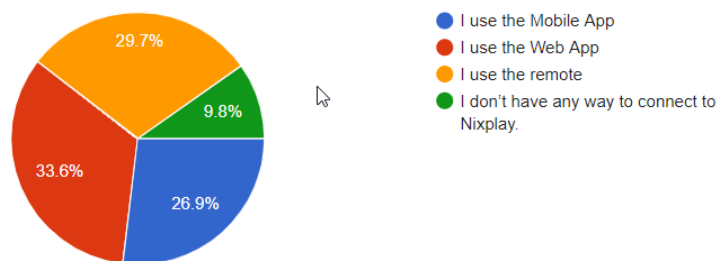
How do you like to connect to your Nixplay?

3,309 responses



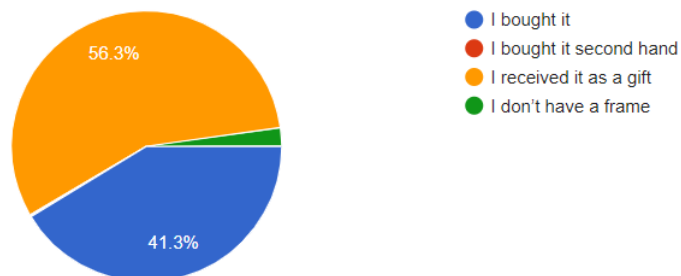
Is there another way you connect to your Nixplay?

3,309 responses



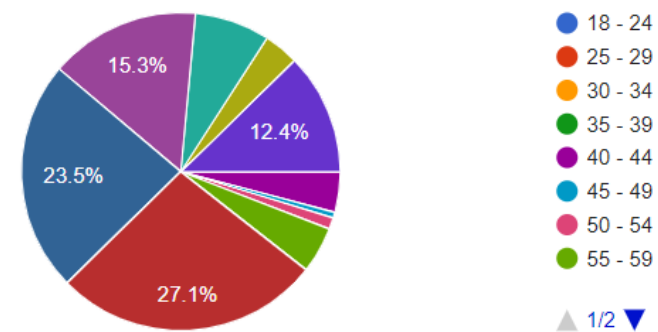
How did you get your Frame?

3,309 responses



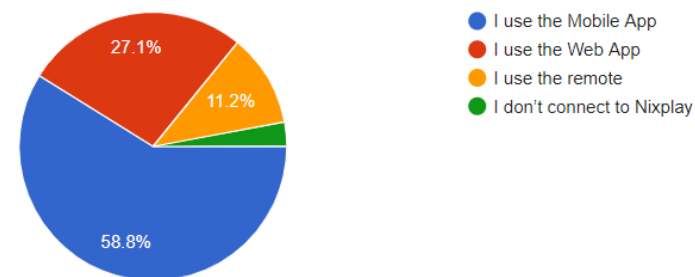
Which age group best describes you?

170 responses



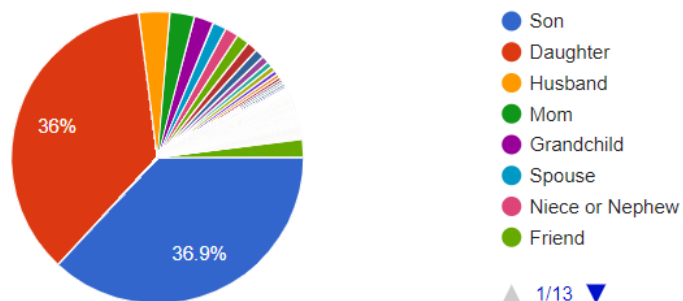
How do you like to connect to your Nixplay?

170 responses



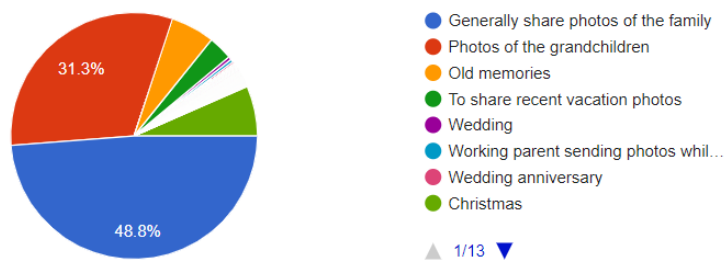
If you received it as a gift, who gave it to you?

1,862 responses



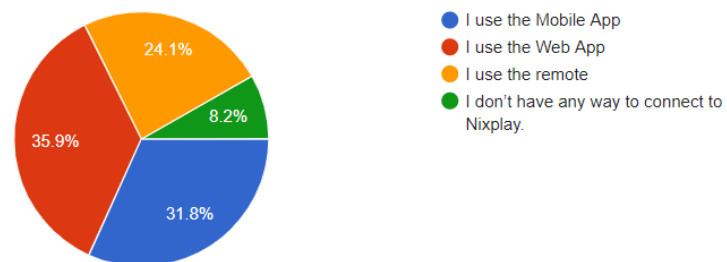
Was there a key reason and use for why you received the frame or as a gift?

3,236 responses



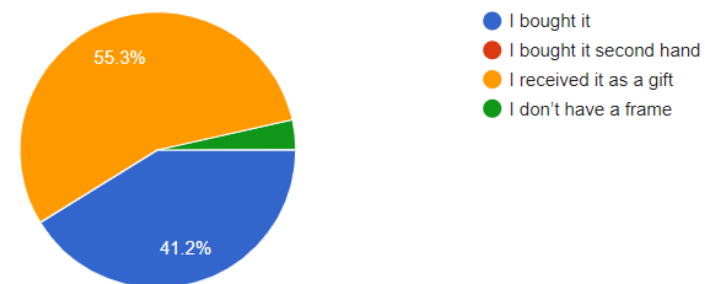
Is there another way you connect to your Nixplay?

170 responses



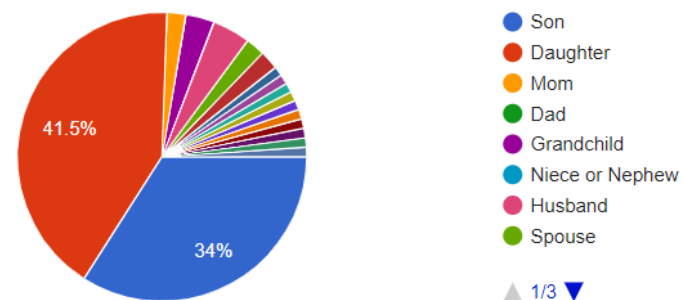
How did you get your Frame?

170 responses



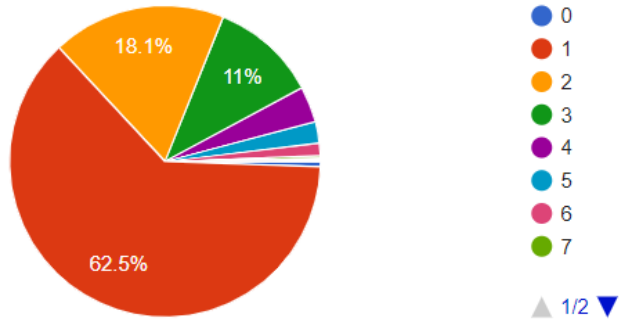
If you received it as a gift, who gave it to you?

94 responses



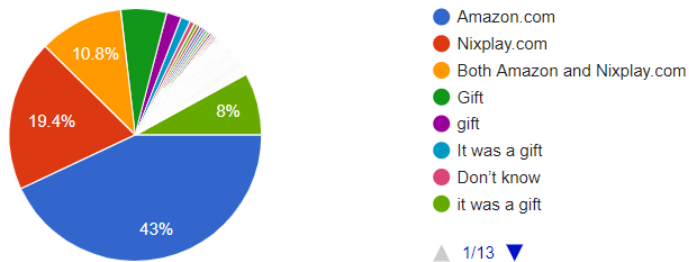
How many Nixplay frames do you and your family own?

3,236 responses



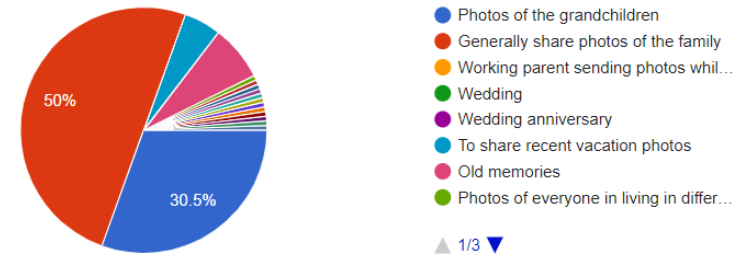
Where did you buy your frame(s)?

3,236 responses



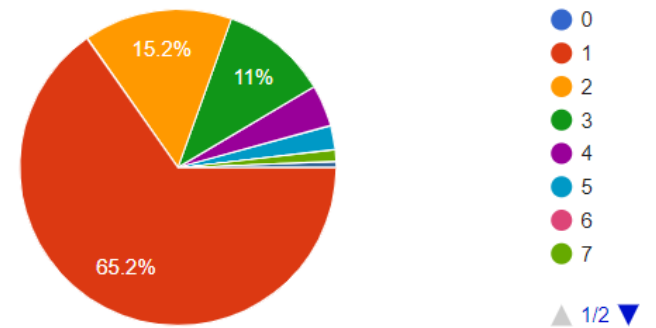
Was there a key reason and use for why you received the frame or as a gift?

164 responses



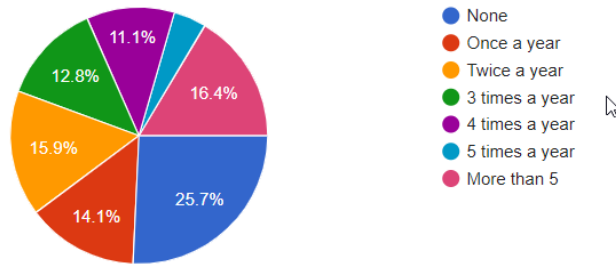
How many Nixplay frames do you and your family own?

164 responses



Do you ever print your photos? If you do, how often do you print photos per year?

3,309 responses



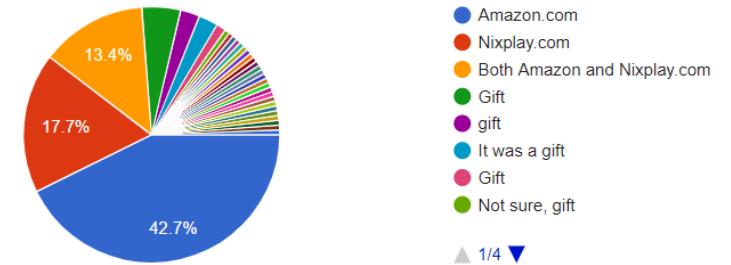
What service do you use to print?

2,458 responses



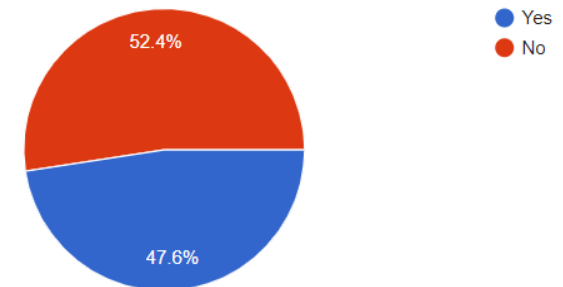
Where did you buy your frame(s)?

164 responses



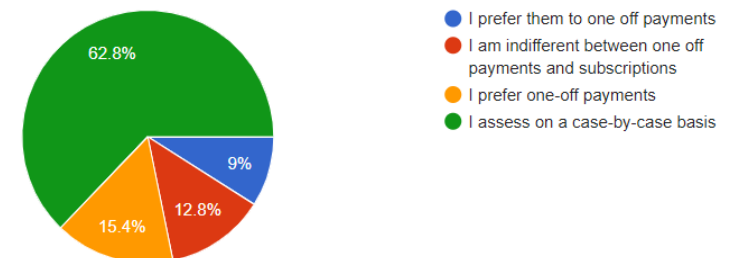
Do you use web-based subscription services? These could be subscription services, such as software or for online newspapers

164 responses



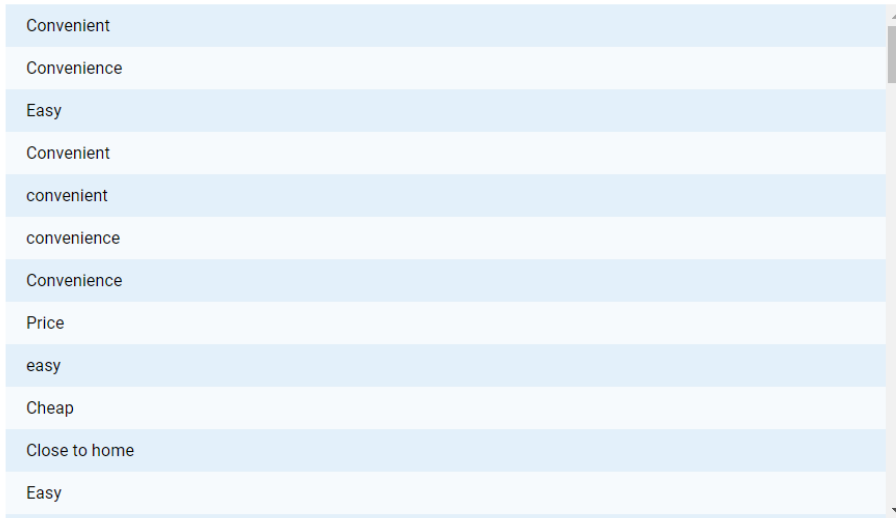
What best describes you with respect to subscription services?

78 responses



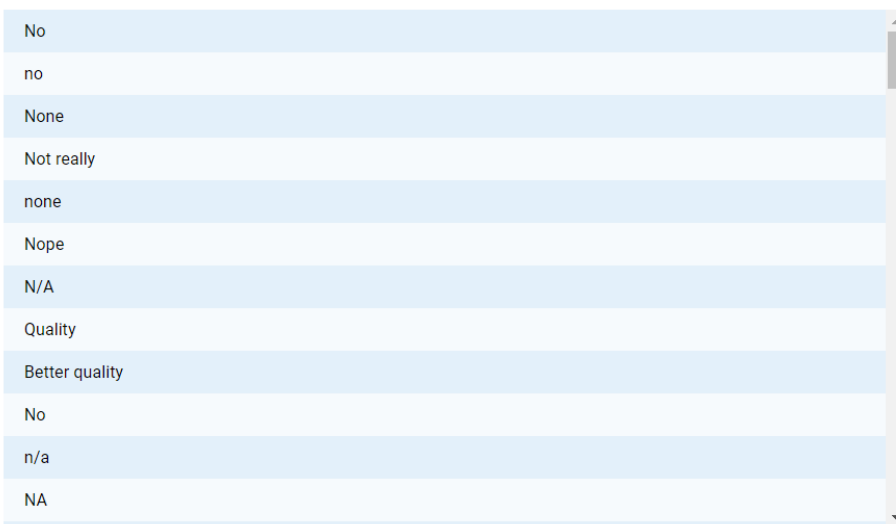
Why do you use the print service that you are using?

2,458 responses



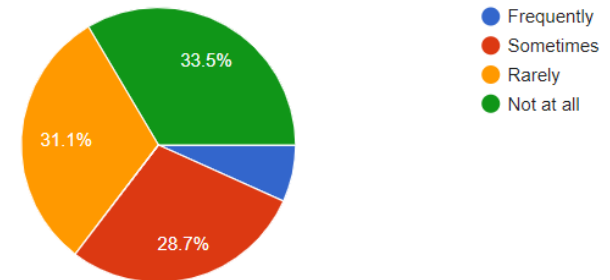
Are there any problems or improvements you would like to see in the current photo printing service you use?

2,458 responses



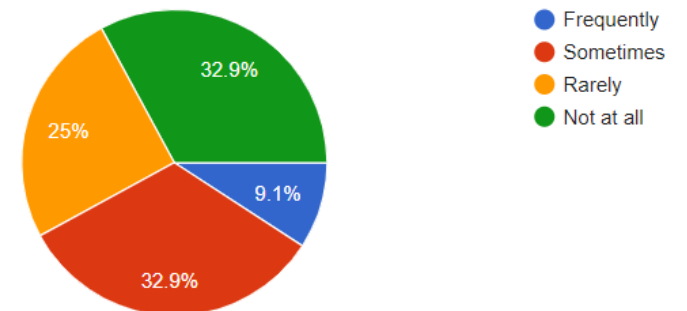
Do you print your digital photos through a bricks-and-mortar store?

164 responses



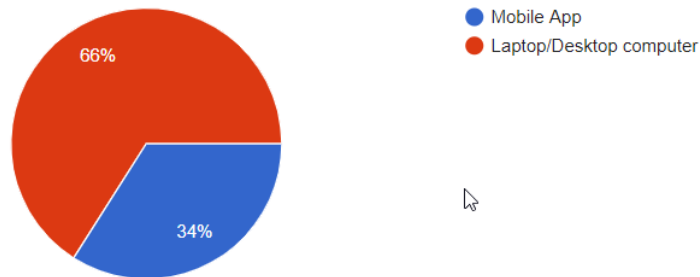
Have you ever ordered prints off the Internet?

164 responses



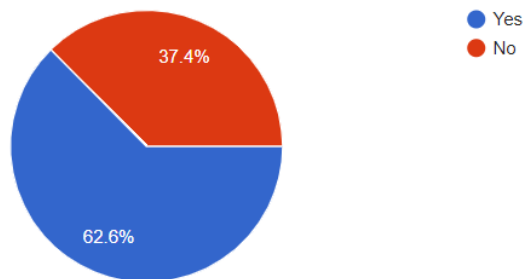
Do you use a mobile app or computer to select and order printed photos?

2,458 responses



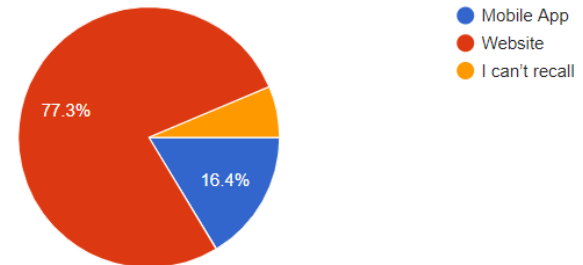
Did you know that Nixplay can also send video from the mobile and display it on the frame?

3,309 responses



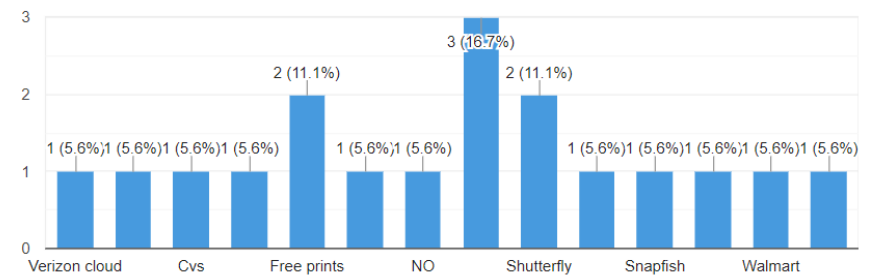
When you ordered your photos of the Internet did you use a mobile app or was it through a website?

110 responses



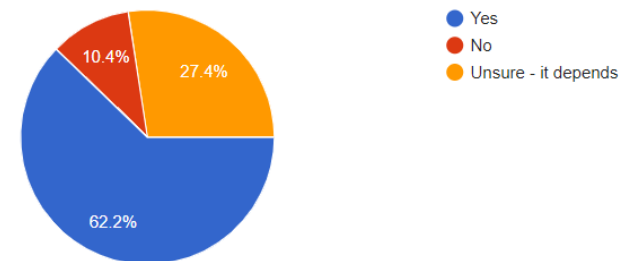
Do you recall the name of the app?

18 responses



Would you consider printing any of the photos that you have uploaded to your Nixplay Frame?

164 responses



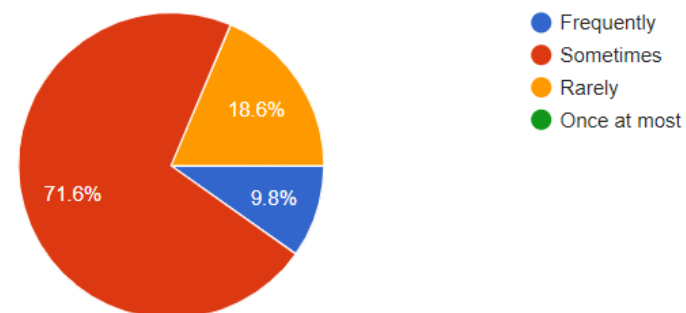
Thank you for answering our questions, just one last question: If there is any one thing you would like Nixplay to improve what would it be?

2,077 responses



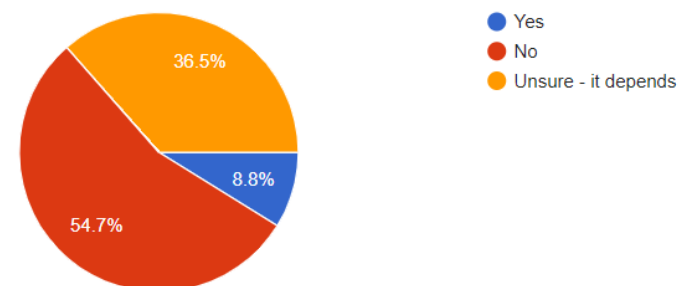
How often do you imagine you would print Nixplay photos?

102 responses



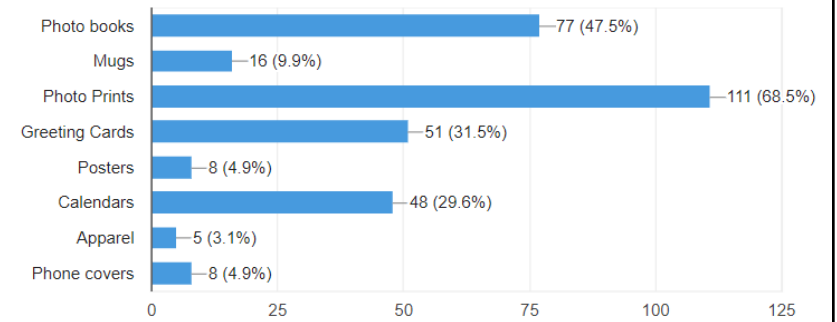
Pictures on Nixplay frames often change. Would you consider a subscription service that sent you some printed items of what had appeared on the frame during the past month?

170 responses



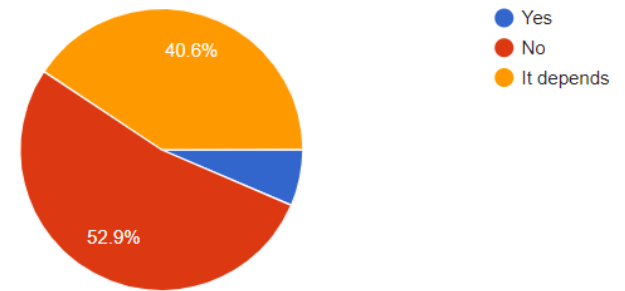
What printed items interest you the most? Check everything that applies.

162 responses



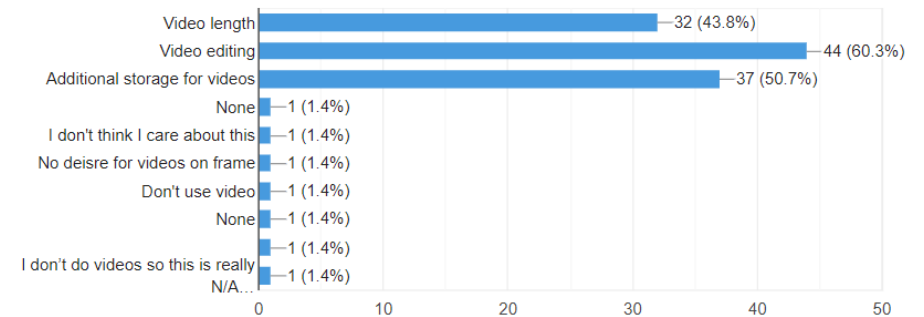
Would you pay for the ability to edit and improve your photos and videos?

155 responses



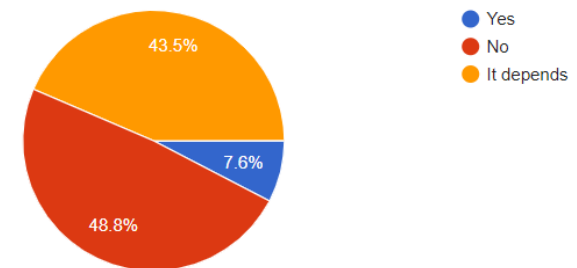
What specific video capabilities would you consider being part of a subscription? Please select all that apply

73 responses



Would you pay for unlimited cloud storage for your Nixplay photos and videos?

170 responses



24. If you would like to be kept up-to-date on our progress with print, please leave your email address here:

37 responses

How Nixplay Subscribers were segmented

90% Split (Mark Version) - Active email subscribers from Canada or the United States that have opened an email in the past 365 days.

10% Split (Matt Version) - Active email subscribers from Canada or the United States from Tier 2 ISPS (ie Comcast) that have opened an email in the past 365 days.

Additional learnings

- Intercom does not have the true ability to split lists into 90/10 and a workaround was done to ensure the versions were sent out to the distribution as best as possible. A customer attribute for allowing splits other than the standard 50/50 split will need to be developed if such kind of split lists are needed in the future
- Average click rates for both versions of the email survey relatively higher click rate than our current average, suggesting subscribers have a strong interest in sharing their thoughts and information with us if it results in a deeper, more useful experience with us.
- Although email subscribers are registered in our database as living in the US or Canada, a handful of subscribers wound up relocating outside of North America, while still using Nixplay, based on their responses.
- Top 4 of 5 US states (California, Florida, Texas, New York) have significant native or bilingual Spanish speaking residents. It would be a good opportunity for retail presence to have bilingual messaging on those locations and others with major bilingual English-Spanish residents and also for the opportunity to cultivate bilingual American influencers to build presence beyond US Core segments
- Quebec Province is the 4th major Canadian province and they are a majority Quebec French-speaking population. Bill 101 in Quebec Province discourages business from being involved in Quebec unless they provide French-language content in the Quebec dialect.
- The top US retail outlets, Walgreen's, Costco, CVS, are targeted towards lower-income to middle-class consumers. Walgreen's and CVS as a popular chain of pharmacy stores that are either part of local strip malls, suburban shopping malls, or standalone stores in large cities
- Costco is a wholesaler that provides lower prices or brand bundle a variety of slower selling products to their core product to get it out of inventory (ie Anthem, Mass Effect 4, and Star Wars Battlefront 2 games bundled with 1st generation PS4 consoles).