Competitive Overview

Overall Perception
Q340 (Top 2 Box) n=104

- Stone World: 91%
- Countertops & Architectural Surfaces: 76%
- Stone Update: 68%

Recommend
Q350 (Top 2 Box) n=104

- Stone World: 85%
- Countertops & Architectural Surfaces: 67%
- Stone Update: 65%

Most Useful
Q330

- Stone World: 76%
- Countertops & Architectural Surfaces: 6%
- Stone Update: 6%
- Other: 12%

Subscriber Media Engagement

Awareness (Q200) n=108

- Stone World: 100%
- Countertops & Architectural Surfaces: 54%
- Stone Update: 53%

Usage (Q200) n=108

- Stone World: Past 13% Current 83% Total 96%
- Countertops & Architectural Surfaces: Past 15% Current 31% Total 46%
- Stone Update: Past 6% Current 23% Total 30%

Interaction Frequency (Q210) n=108

- Stone World: Never 3% Less than once per month 19% Once a month 27% A couple times per month 28% A couple times per week 10% Daily 12% Total 2%
- Stone Update: Never 60% Once a week 17% Once a month 8% A couple times per month 6% A couple times per week 6% Daily 3%
- Countertops & Architectural Surfaces: Never 66% Once a week 14% Once a month 7% A couple times per month 7% A couple times per week 3% Daily 3%
Competitive Overview 2019

Word-of-Mouth (NPS) (Q350) n=43-104

<table>
<thead>
<tr>
<th>Stone World</th>
<th>15% Detractors (0-6)</th>
<th>30% Neutral (7-8)</th>
<th>55% Promoters (9-10)</th>
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<tbody>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Stone Update</th>
<th>35% Detractors (0-6)</th>
<th>23% Neutral (7-8)</th>
<th>42% Promoters (9-10)</th>
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</table>

<table>
<thead>
<tr>
<th>Countertops &amp; Architectural Surfaces</th>
<th>33% Detractors (0-6)</th>
<th>37% Neutral (7-8)</th>
<th>30% Promoters (9-10)</th>
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</thead>
<tbody>
<tr>
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</tbody>
</table>

NPS

-2 6 39

Improvements & Recommendations (Q360) n=67

- All is good, participation in live events
- Be forward thinking and demonstrate that visually
- Better mobile-device experience
- Bigger Facebook presence
- Case study
- Cater more to fabricators and less to the supplying aspect of the stone industry
- Continue to provide relevant marketing material
- Digital magazine emails
- Easier access to content online
- Engage in more events, promotions
- Expand on latest innovations
- Have more content for professional hard surface cleaning companies; we own a marble/travertine/hard surface cleaning company and rarely find articles addressing issues that are important to us
- Have reader comment card that allows for sample requests to advertising companies
- I do like to see more details on specific projects
- I prefer more articles on quarries and the business of generating raw materials
- I usually prefer how-to and product demonstration videos
- Increase your architectural content
- Involvement in standards
- Just keep things updated and current
- Keep it free to the trades
- Larger print
- Less coverage on who’s at a conference and more coverage on maintenance and repair of stone products
- Less fabrication articles
- Make us aware of more upcoming trends
- More advance notice
- More articles
- More articles about design, and how to combine stone surfaces with other materials
- More digital articles and videos on repairs and installs of different materials in varied conditions/locations
- More feature articles on stone material science and stone working techniques
- More innovative current solutions
- More Instagram Mini teaser on articles
- More product information regarding care and maintenance of stone for customer service
- More video interviews
- New product videos
- New subscriber, stir assessing questions asked; important to note I operate a masonry & masonry store yard and do sell polished stone
- Offer more installation techniques and tips/tricks
- Project profiles
- Provide examples of smaller projects from different areas of the United States
- Provide links to manufacturers websites; but making sure they have decent working websites with pictures of available products; too many web searches lead to disappointment
- Provide more information on the restoration and maintenance of exterior stone use
- Provide more technical information and Installation Drawings
- Provide up to date and accurate information on new equipment
- Publish more interior design and architecture projects, design solutions, unique applications, etc.
- Put a little more focus on the smaller single-family projects
- Question and answer section; more local stories/articles
- Recorded webinars that we can download at our leisure
- Regional information
- Regular article on fabrication techniques, Installation & Troubleshooting; something the people in the shop can benefit from learning others techniques and mistakes
- Request info cards like years ago
- Season relevance of content

*All verbatim responses included in attached Excel sheet*
### Media Source Selection Criteria

**Important Attributes (Q100)**  
- **Trustworthiness of Content**: 9% Not Important, 91% Important
- **Up-to-Date Industry Articles/Features**: 13% Not Important, 87% Important
- **Content Accessibility**: 2% Not Important, 15% Neither, 83% Important
- **Content Relevance to Job**: 18% Not Important, 82% Important
- **Uniqueness of Content**: 3% Not Important, 33% Neither, 64% Important

**Stone World vs. Competitor Performance (Q300)**  
- **Content**: 24% Not Important, 76% Important
- **ENGAGEMENT METHODS**: 1% Not Important, 39% Neither, 60% Important
- **MEDIA PROVIDER**: 2% Not Important, 25% Neither, 73% Important

### Additional Attributes
- **Ease of capturing/saving for future reference**: 4% Not Important, 29% Neither, 67% Important
- **Content available in print**: 7% Not Important, 29% Neither, 65% Important
- **Ease of sharing**: 9% Not Important, 31% Neither, 61% Important
- **Content available in digital article**: 11% Not Important, 28% Neither, 60% Important
- **Content available via online video**: 15% Not Important, 35% Neither, 50% Important
- **Content available via podcast**: 36% Not Important, 46% Neither, 18% Important
- **Industry expertise**: 2% Not Important, 10% Neither, 88% Important
- **Website functionality**: 4% Not Important, 16% Neither, 80% Important
- **Overall content search functionality**: 3% Not Important, 18% Neither, 79% Important
- **Website content**: 4% Not Important, 22% Neither, 75% Important
- **Overall reputation of brand/media provider**: 5% Not Important, 25% Neither, 71% Important
- **Involvement in industry events**: 18% Not Important, 26% Neither, 56% Important
- **Continuing education opportunities offered**: 7% Not Important, 39% Neither, 54% Important
- **Relevance of Advertising**: 7% Not Important, 50% Neither, 43% Important
- **Social Media presence**: 37% Not Important, 36% Neither, 28% Important

*NA/DK removed*
### Media Consumption 2019

**Top 10 Preferred Formats**  (Q420) n=108

- Print trade magazines: 34%
- Digital media: 16%
- Mfg websites: 13%
- Trade media websites: 9%
- In-person events: 7%
- Videos: 6%
- In-person training: 4%
- eNewsletters: 3%
- Social media: 3%
- Print newsletters: 3%

**Interaction Expectations Next 12 Months**  (Q400) n=108

- **Mfg websites**
  - Online: 1% (Never), 12% (Less than once per month), 10% (A couple times per month), 22% (Once a month), 25% (A couple times per week), 18% (Once a week), 12% (Daily)
  - Offline: 1% (Never), 12% (Less than once per month), 10% (A couple times per month), 22% (Once a month), 25% (A couple times per week), 18% (Once a week), 12% (Daily)

- **Trade media websites**
  - Online: 3% (Never), 19% (Less than once per month), 19% (A couple times per month), 28% (Once a month), 14% (A couple times per week), 13% (Once a week), 4% (Daily)
  - Offline: 3% (Never), 19% (Less than once per month), 19% (A couple times per month), 28% (Once a month), 14% (A couple times per week), 13% (Once a week), 4% (Daily)

- **eNewsletters**
  - Online: 11% (Never), 21% (Less than once per month), 19% (A couple times per month), 22% (Once a month), 19% (A couple times per week), 6% (Once a week), 2% (Daily)
  - Offline: 11% (Never), 21% (Less than once per month), 19% (A couple times per month), 22% (Once a month), 19% (A couple times per week), 6% (Once a week), 2% (Daily)

- **Videos**
  - Online: 11% (Never), 27% (Less than once per month), 18% (A couple times per month), 19% (Once a month), 14% (A couple times per week), 10% (Once a week), 2% (Daily)
  - Offline: 11% (Never), 27% (Less than once per month), 18% (A couple times per month), 19% (Once a month), 14% (A couple times per week), 10% (Once a week), 2% (Daily)

- **Digital media**
  - Online: 12% (Never), 19% (Less than once per month), 24% (A couple times per month), 20% (Once a month), 15% (A couple times per week), 7% (Once a week), 3% (Daily)
  - Offline: 12% (Never), 19% (Less than once per month), 24% (A couple times per month), 20% (Once a month), 15% (A couple times per week), 7% (Once a week), 3% (Daily)

- **CE/Training**
  - Online: 15% (Never), 48% (Less than once per month), 18% (A couple times per month), 18% (Once a month), 10% (A couple times per week), 7% (Once a week), 2% (Daily)
  - Offline: 15% (Never), 48% (Less than once per month), 18% (A couple times per month), 18% (Once a month), 10% (A couple times per week), 7% (Once a week), 2% (Daily)

- **Virtual Events**
  - Online: 19% (Never), 47% (Less than once per month), 16% (A couple times per month), 13% (Once a month), 13% (A couple times per week), 2% (Once a week), 4% (Daily)
  - Offline: 19% (Never), 47% (Less than once per month), 16% (A couple times per month), 13% (Once a month), 13% (A couple times per week), 2% (Once a week), 4% (Daily)

- **Social media**
  - Online: 34% (Never), 20% (Less than once per month), 8% (A couple times per month), 13% (Once a month), 9% (A couple times per week), 6% (Once a week), 8% (Daily)
  - Offline: 34% (Never), 20% (Less than once per month), 8% (A couple times per month), 13% (Once a month), 9% (A couple times per week), 6% (Once a week), 8% (Daily)

- **Industry Apps**
  - Online: 35% (Never), 29% (Less than once per month), 16% (A couple times per month), 7% (Once a month), 7% (A couple times per week), 6% (Once a week), 6% (Daily)
  - Offline: 35% (Never), 29% (Less than once per month), 16% (A couple times per month), 7% (Once a month), 7% (A couple times per week), 6% (Once a week), 6% (Daily)

- **Virtual reality**
  - Online: 60% (Never), 23% (Less than once per month), 8% (A couple times per month), 6% (Once a month), 6% (A couple times per week), 3% (Once a week), 3% (Daily)
  - Offline: 60% (Never), 23% (Less than once per month), 8% (A couple times per month), 6% (Once a month), 6% (A couple times per week), 3% (Once a week), 3% (Daily)
Online/Offline Formats Considered Most...

- **Easily Shared**: 61% Online, 39% Offline
- **Relevant for job**: 60% Online, 40% Offline
- **Current**: 56% Online, 44% Offline
- **Informative**: 56% Online, 44% Offline
- **Easily Saved**: 54% Online, 46% Offline
- **Beneficial for work overall**: 47% Online, 53% Offline
- **Trustworthy**: 44% Online, 56% Offline
- **Engaging**: 37% Online, 63% Offline

**Top 3 Formats Considered Most...**

- **Relevant for Job**
  - Mfg websites: 24%
  - Print trade magazines: 24%
  - Digital media: 10%
  - Trade media websites: 10%
  - Videos: 10%

- **Trustworthy**
  - Print trade magazines: 29%
  - Mfg websites: 17%
  - In-person events: 13%

- **Informative**
  - Print trade magazines: 24%
  - Mfg websites: 19%
  - In-person events: 14%

- **Easily Shared**
  - Print trade magazines: 29%
  - Digital media: 19%
  - Mfg websites: 14%

- **Beneficial for Work Overall**
  - Print trade magazines: 31%
  - In-person events: 17%
  - Mfg websites: 15%
**Stage 1: Information Gathering**

- Manufacturer websites: 51%
- Trade mags - print: 36%
- Industry colleagues/peers: 31%
- In-person events/trade shows: 26%
- Digital editions of trade magazines: 13%
- Trade mags - website: 13%
- Industry Trade Associations: 10%
- Digital directories/Buyer's guides: 8%
- Virtual events/trade shows: 6%
- Print directories/Buyer's guides: 4%
- Social Media: 1%
- Other: 1%

**Stage 2: Product/Provider Comparisons**

- Manufacturer websites: 49%
- Industry colleagues/peers: 37%
- In-person events/trade shows: 26%
- Trade mags - print: 24%
- Trade mags - website: 16%
- Industry Trade Associations: 11%
- Digital editions of trade magazines: 10%
- Virtual events/trade shows: 7%
- Digital directories/Buyer's guides: 6%
- Print directories/Buyer's guides: 6%
- Social Media: 5%
- Other: 4%

**Stage 3: Final Purchase/Specification**

- Manufacturer websites: 53%
- Industry colleagues/peers: 45%
- In-person events/trade shows: 32%
- Trade mags - print: 17%
- Digital directories/Buyer's guides: 8%
- Trade mags - website: 8%
- Industry Trade Associations: 8%
- Print directories/Buyer's guides: 7%
- Digital editions of trade magazines: 6%
- Virtual events/trade shows: 5%
- Social Media: 4%
- Other: 7%
Social Media Usage & Value (Q500/Q510) n=72

- YouTube: 45% (Most Beneficial for Work), 65% (Use Next 12 Months)
- LinkedIn: 20% (Most Beneficial for Work), 42% (Use Next 12 Months)
- Facebook: 17% (Most Beneficial for Work), 57% (Use Next 12 Months)
- Instagram: 4% (Most Beneficial for Work), 32% (Use Next 12 Months)
- Pinterest: 3% (Most Beneficial for Work), 19% (Use Next 12 Months)
- Wikipedia: 3% (Most Beneficial for Work), 8% (Use Next 12 Months)
- Twitter: 1% (Most Beneficial for Work), 15% (Use Next 12 Months)
- Snapchat: 1% (Most Beneficial for Work), 1% (Use Next 12 Months)
- Other: 3% (Most Beneficial for Work), 1% (Use Next 12 Months)
- None: 3% (Most Beneficial for Work), 1% (Use Next 12 Months)

Mobile Device App Usage & Value (Q600/Q610) n=70

- Calculators: 63%
- Mfr Tools: 36%
- Trade Publication: 30%
- Mfr Product Guides: 29%
- Product Purchase/Shopping: 27%
- Travel: 27%
- Industry Directories: 21%
- Industry Event: 17%
- Other: 3%
- None: 19%

Most Beneficial Apps: (n=40, NA/None responses removed)

1. Calculator/Construction Calculator App (7)
2. Stone World App (6)
3. LinkedIn (4)
4. Facebook (2)
5. Specific manufacturer app (2)

*Most frequent mentions presented*
Industry Involvement 2019

Continuing Education (Q700/Q720)

Training Most preferred n=108

- Videos: 46%
- Lunch & Learns: 44%
- Live events: 43%
- Articles: 41%
- Webinars: 37%
- Virtual events: 16%
- Podcasts: 14%
- Other: 1%

Certifications (Q710) n=51, None responses removed

Commonly Held Certifications:

1. Architect license (12)
2. LEED AP/LEED BD+C (8)
3. AIA (5)
4. NCIDQ (3)
5. NCARB (2)
6. PMI (2)

*Most frequent mentions presented*
## Annual Number Attended (Q800) n=107

### Live Events

- 5 or more events: 8%
- 4 events: 4%
- 3 events: 15%
- 2 events: 31%
- 1 event: 29%
- None: 13%

**Mean:** 1.99  
**Median:** 2.00

## Industry Event Importance (Q100) n=106

- Very Important (8-10): 56%
- Neutral (4-7): 26%
- Not Important (1-3): 18%

## Industry Event Statement Agreement (Q810) n=94

**Industry events...**

1. **Enable me to keep up to date on the current industry products/trends/technologies**
   - Strongly Disagree (1): 1%
   - Disagree (2): 4%
   - Neither (3): 60%
   - Agree (4): 35%
   - Strongly Agree (5): 3%

2. **Enhance my professional relationships**
   - Strongly Disagree (1): 3%
   - Disagree (2): 14%
   - Neither (3): 52%
   - Agree (4): 31%
   - Strongly Agree (5): 14%

3. **Provide me with fresh ideas to improve the way I approach my job**
   - Strongly Disagree (1): 1%
   - Disagree (2): 14%
   - Neither (3): 57%
   - Agree (4): 28%
   - Strongly Agree (5): 14%

4. **Provide networking opportunities I wouldn't otherwise have**
   - Strongly Disagree (1): 3%
   - Disagree (2): 24%
   - Neither (3): 47%
   - Agree (4): 26%
   - Strongly Agree (5): 18%

5. **Enable me to be more productive in my job**
   - Strongly Disagree (1): 3%
   - Disagree (2): 26%
   - Neither (3): 49%
   - Agree (4): 22%
   - Strongly Agree (5): 18%

6. **Are a good time but don't impact the way I approach my job**
   - Strongly Disagree (1): 18%
   - Disagree (2): 45%
   - Neither (3): 21%
   - Agree (4): 12%
   - Strongly Agree (5): 4%

7. **Provide little value to me, more relevant events should be offered**
   - Strongly Disagree (1): 30%
   - Disagree (2): 38%
   - Neither (3): 20%
   - Agree (4): 12%
   - Strongly Agree (5): 12%

*Mean: 1.99  Median: 2.00*
**Stone World Events Perception (Q300)**

- Better (4-5): 61%
- Same (3): 37%
- Worse (1-2): 3%

**Compared to Competitors**

**Perception – Stone World Events Are A Positive Experience (Q310)**

- Agree (4-5): 40%
- Neutral (3): 56%
- Disagree (1-2): 4%

**Interaction Expectations In Next 12 Months (Q400)**

<table>
<thead>
<tr>
<th>Method</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
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<tbody>
<tr>
<td>Print Trade Magazines</td>
<td>3%</td>
<td>9%</td>
<td>31%</td>
<td>19%</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Print Newsletters</td>
<td>9%</td>
<td>21%</td>
<td>29%</td>
<td>19%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>In-Person Events</td>
<td>9%</td>
<td></td>
<td>74%</td>
<td></td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>In-person Training</td>
<td>20%</td>
<td></td>
<td>54%</td>
<td></td>
<td>13%</td>
<td>7%</td>
</tr>
</tbody>
</table>
Stone World Advertising Perception Agreement (Q310) n=108

Messages Across Media Formats Are Useful
- 54%

Rely on Marketing Messages for Information
- 61%

Trust Companies that Market with Stone World
- 66%

Marketing with Stone World Enhances Company Image
- 57%

Take Action As a Result of Marketing Communications (Q320) n=108
- 94%
- 6%

Actions Taken Based on Marketing Communications (Q320) n=102

- Saved for future reference: 75%
- Sought out more info via an internet search: 74%
- Visited advertiser's website: 71%
- Discussed with someone else: 67%
- Passed along the information to someone else: 60%
- Requested additional info directly from advertiser: 51%
- Investigated competitive offerings: 40%
- Recommended the purchase of advertised products/services: 38%
- Purchased products/services advertised: 33%

*Did not take any action removed
**Audience Reach**

**Purchase Involvement**

- Approve/Authorize Purchases: 2%
- Select/Specify purchases: 5%
- Recommend purchases: 15%
- Involved in other ways: 36%
- Not involved in purchasing: 43%

**Purchase Channels (Avg %)**

- Mfg/supplier/provider direct: 31%
- Specialty industry distributor: 30%
- Other local retailers - brick & mortar: 12%
- Big box distributor: 11%
- Other online retailer websites: 8%
- Amazon.com: 4%
- Other: 5%

*DK Removed

**Product Purchase Involvement**

- Natural stone: 79%
- Quartz: 61%
- Engineered stone: 60%
- Grouts: 57%
- Installation materials: 55%
- Tools: 50%
- Mortars: 47%
- Hand tools: 45%
- Saws: 42%
- Software: 38%
- Material handling/Transportation equipment: 36%
- Stone machinery: 31%
- Bridge saws: 29%
- Sintered stone: 27%
- Air/Water treatment: 27%
- Polishing machines: 27%
- CNC machines: 17%
- Waterjets: 15%
- Digital/Electronic templating: 14%
- Other: 7%

**Project Involvement (Avg %)**

- Res: Remodel: 31%
- Comm: New Construction: 20%
- Res: New Construction: 19%
- Comm: Remodel: 18%
- Res: Service: 4%
- Comm: Service: 4%
- Other: 3%

*NA Removed

*DK Removed
**Audience Reach**

**Reader Profile**
- **Gender**
  - Male, 78%
  - Female, 22%
  - Total: 102

- **Years Experience**
  - Mean: 26.18
  - Median: 26
  - Total: 103

- **Generation**
  - Greatest/G.I.: 0%
  - Silent: 6%
  - Baby Boomer: 53%
  - Gen. X: 34%
  - Millennial: 6%
  - Gen. Z: 1%
  - Total: 108

**Business Profile**
- **Revenue**
  - Less than $1M: 48%
  - $1M – $24.9M: 41%
  - $25M – $49.9M: 2%
  - $50M – $99.9M: 1%
  - $100M or more: 8%
  - Median: $1M – $24.9M
  - Total: 91

- **Employees**
  - 25 or less: 70%
  - 26 – 100: 15%
  - 101 – 500: 6%
  - 501 – 1,000: 6%
  - 1,001 – 2,500: 2%
  - 2,501 – 5,000: 2%
  - More than 5,000: 0%
  - Median: 25 or less employees
  - Total: 103

- **Region**
  - MIDWEST: 24%
  - NORTHEAST: 20%
  - SOUTH: 29%
  - WEST: 27%
  - OTHER US TERRITORY: 0%
  - Total: 108

**Industry Reach**
- **Stone fabrication**: 34%
- **Architecture**: 30%
- **Design**: 14%
- **Other**: 22%
  - Total: 108

**Job Title**
- **Owner**: 22%
- **Architect**: 20%
- **Designer**: 12%
- **Executive management**: 11%
- **Fabricator**: 9%
- **Contractor**: 9%
- **Supplier**: 4%
- **Distributor**: 4%
- **Other**: 8%
  - Total: 108

*Prefer not to answer/Don’t know removed for Gender, Years Experience, Revenue and Employees*
Research Methodology

- **Target Audience:** Domestic individuals who have engaged with the brand through one or more formats
- **Sample Source:**
  - Website visitors in past 6 months with an email address on file
  - Individuals who have opened any email from a BNP product in past 6 months, who also have an active, qualified subscription to the brand’s print/digital and/or eNews format(s)
  - Active, qualified subscribers to the brand’s print/digital magazine
  - Active, qualified subscribers to the brand’s eNewsletter(s)
  - Registrants of the brand’s website
- **Survey Method:** Online
- **Average Survey Length:** 10 minutes
- **Field Dates:** April 1 - 12, 2019
- **Incentive:** Each respondent that participated in the study received one entry into a drawing for eight $50 gift cards.

Data Analysis & Reporting

- Tabulations were generated using a statistical software package. Additional analysis was conducted using SPSS, a statistical software program.
- The data is presented in graphic and tabular format detailing the number of respondents who answered each question.
- Sample sizes may vary due to skip logic or data cleaning.
- Data for some charts may not equal 100% due to rounding.

Completed Returns Summary

<table>
<thead>
<tr>
<th>Completed Returns Summary</th>
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<tbody>
<tr>
<td>Overall Invites</td>
<td>25,757</td>
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<tr>
<td>Delivered</td>
<td>23,178</td>
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<tr>
<td>Hard bounce/Bad emails</td>
<td>731</td>
</tr>
<tr>
<td>Deferred/Not delivered</td>
<td>1,848</td>
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<tr>
<td>Opt Outs</td>
<td>158</td>
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<tr>
<td>Terms</td>
<td>3</td>
</tr>
<tr>
<td>Completes</td>
<td>115</td>
</tr>
<tr>
<td>Respondents removed during data cleaning -</td>
<td></td>
</tr>
<tr>
<td>- No engagement with BNP brand</td>
<td>3</td>
</tr>
<tr>
<td>- All other bad data</td>
<td>4</td>
</tr>
<tr>
<td>Usable completes</td>
<td>108</td>
</tr>
</tbody>
</table>