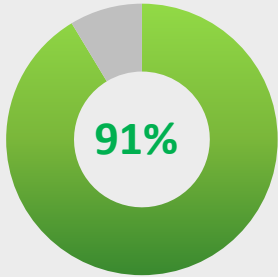


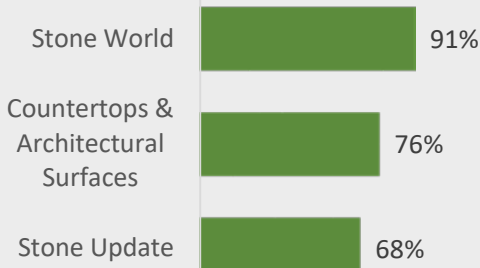
Subscriber Media Engagement

Overall Perception

Q340 (Top 2 Box) n=104



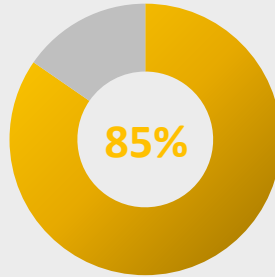
n=42-104



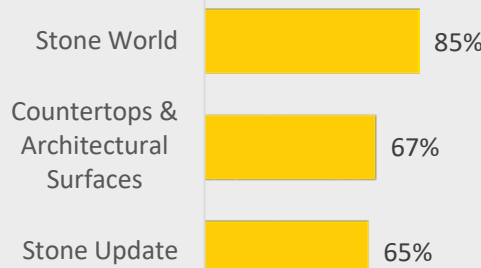
DK removed

Recommend

Q350 (Top 2 Box) n=104



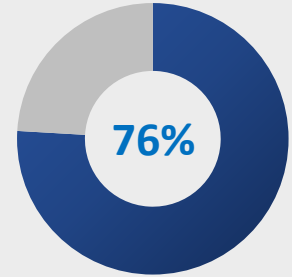
n=43-104



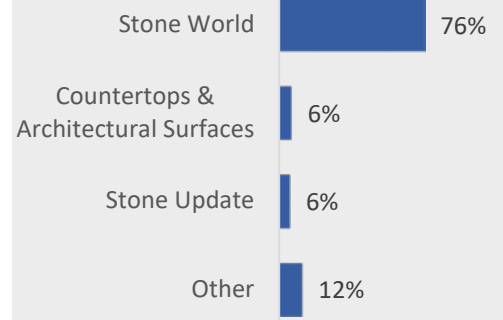
DK removed

Most Useful

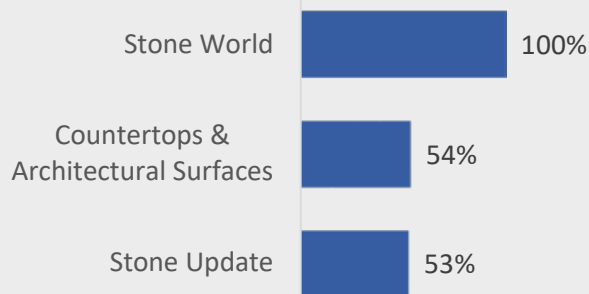
Q330 n=108



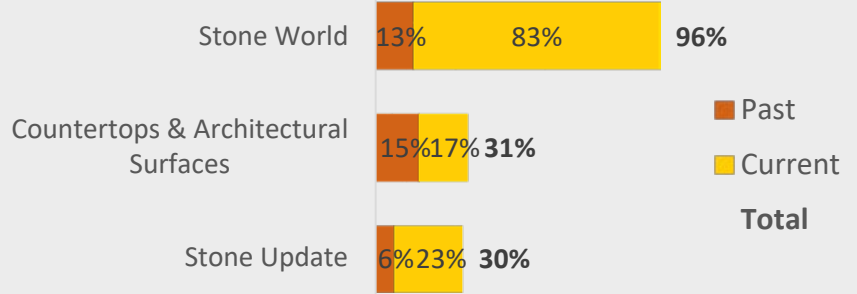
n=108



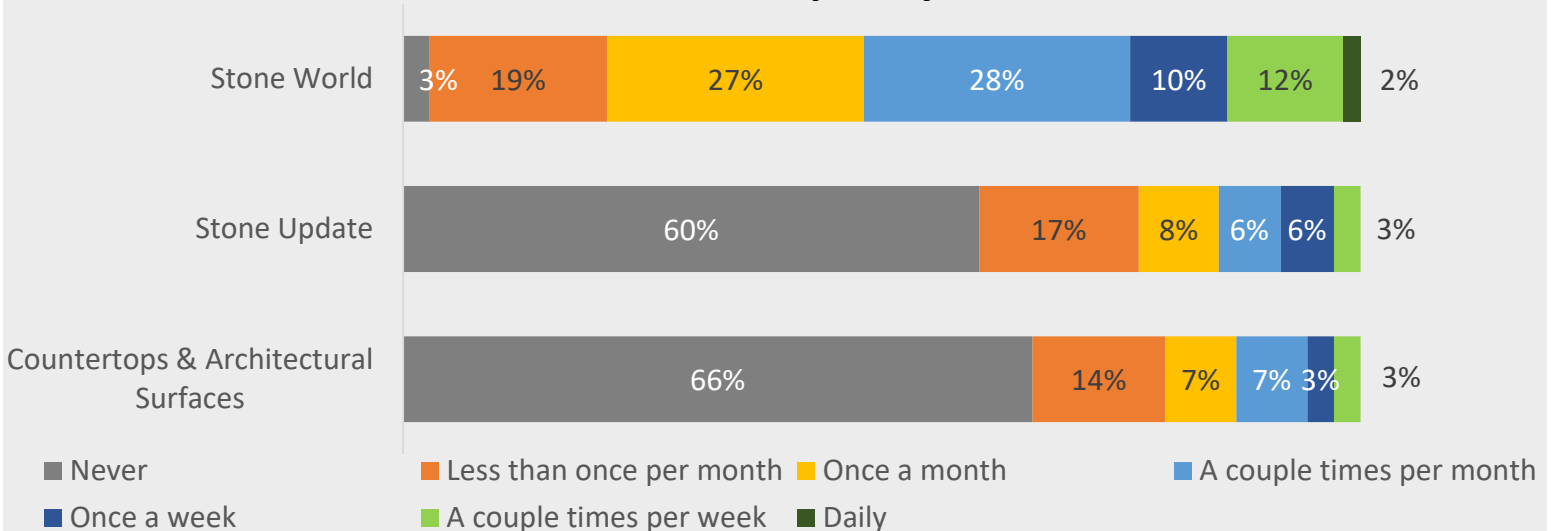
Awareness (Q200) n=108



Usage (Q200) n=108

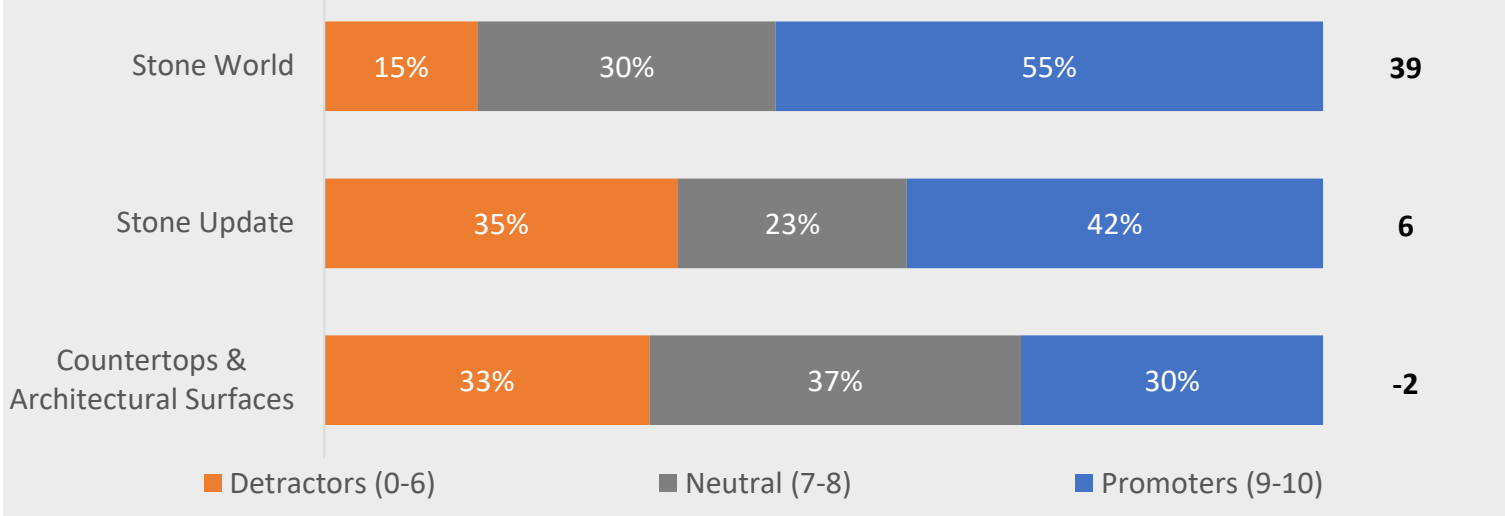


Interaction Frequency (Q210) n=108



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

NPS



Improvements & Recommendations (Q360) n=67

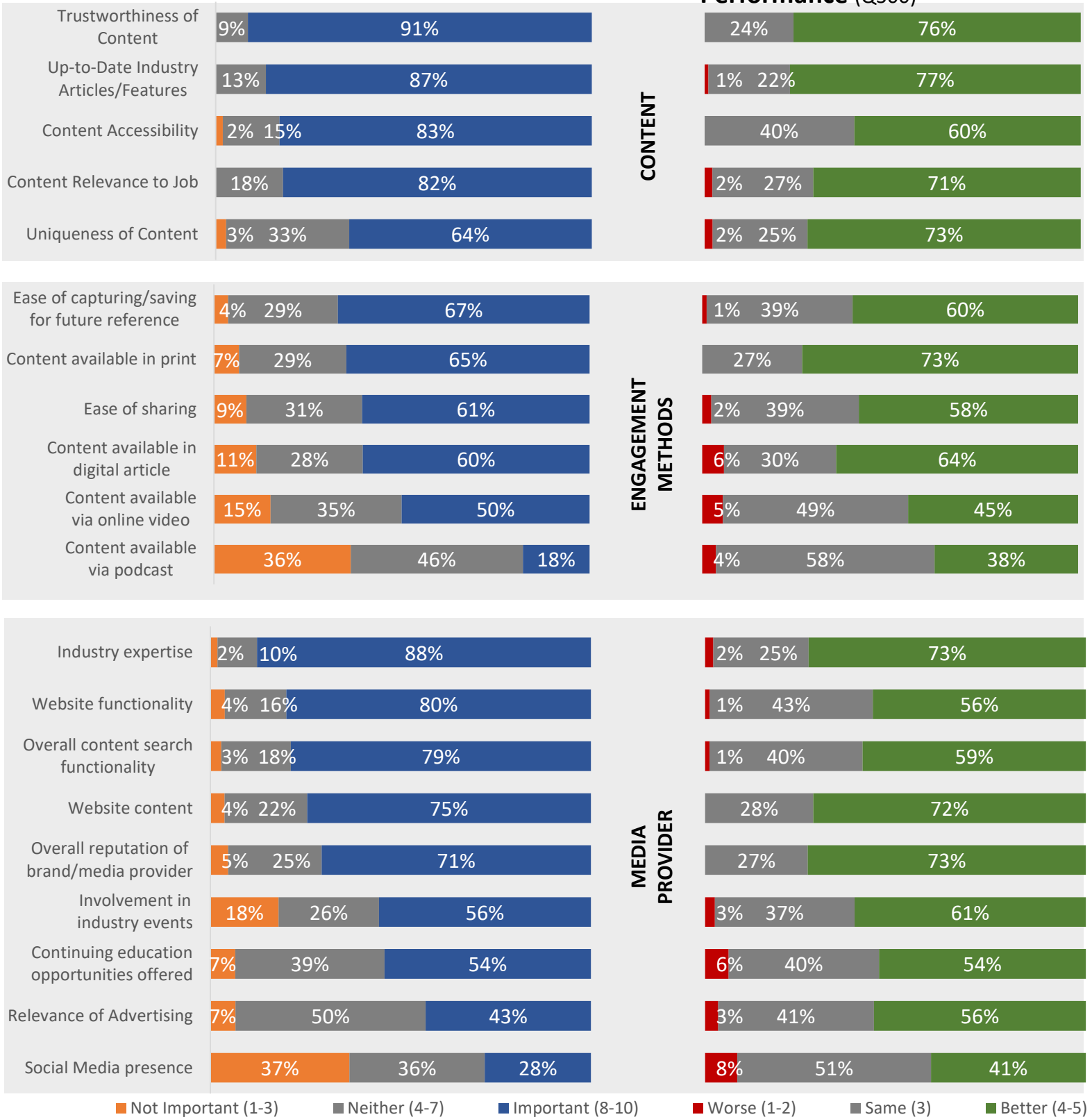
- All is good, participation in live events
- Be forward thinking and demonstrate that visually
- Better mobile-device experience
- Bigger Facebook presence
- Case study
- Cater more to fabricators and less to the supplying aspect of the stone industry
- Continue to provide relevant marketing material
- 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

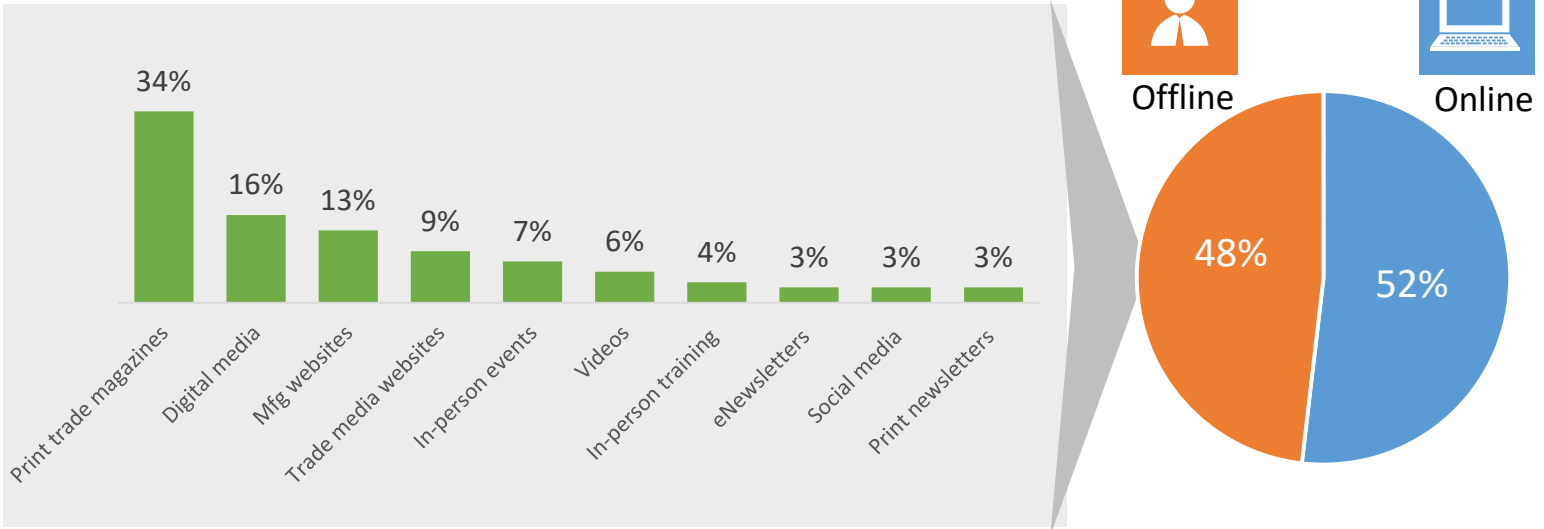
Important Attributes (Q100) n=104-107

Stone World vs. Competitor Performance (Q300) n=55-97

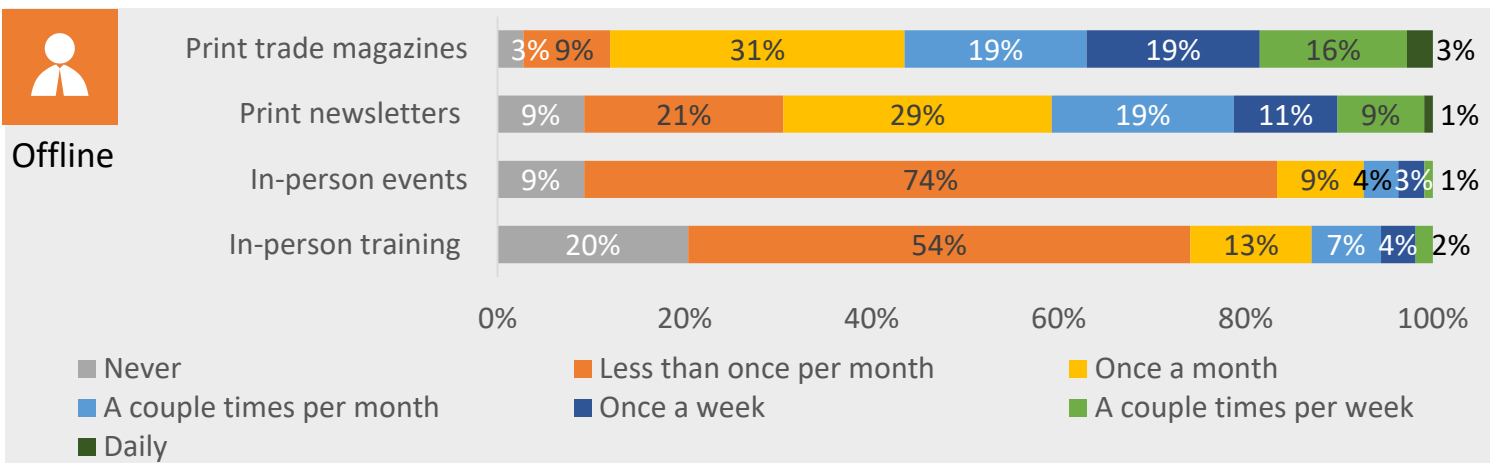
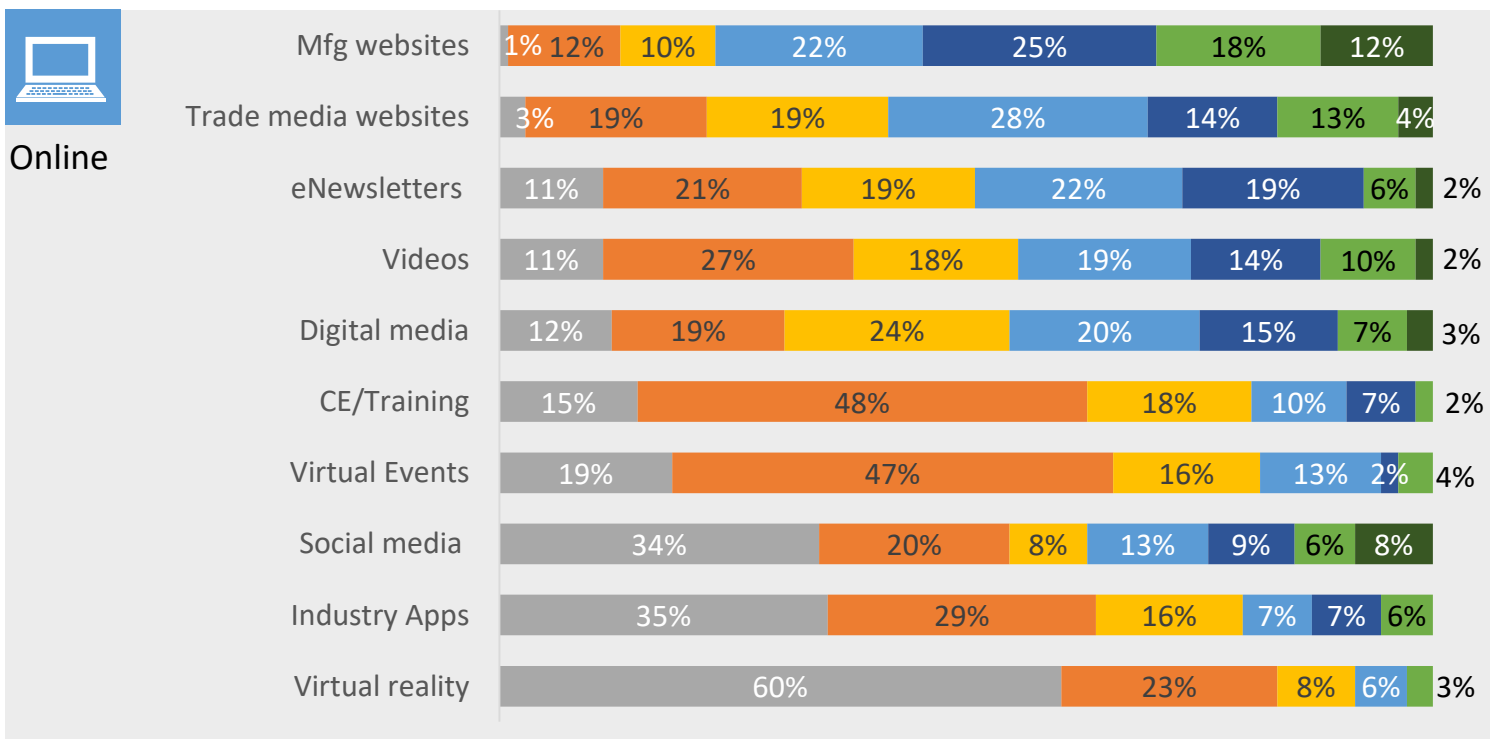


*NA/DK removed

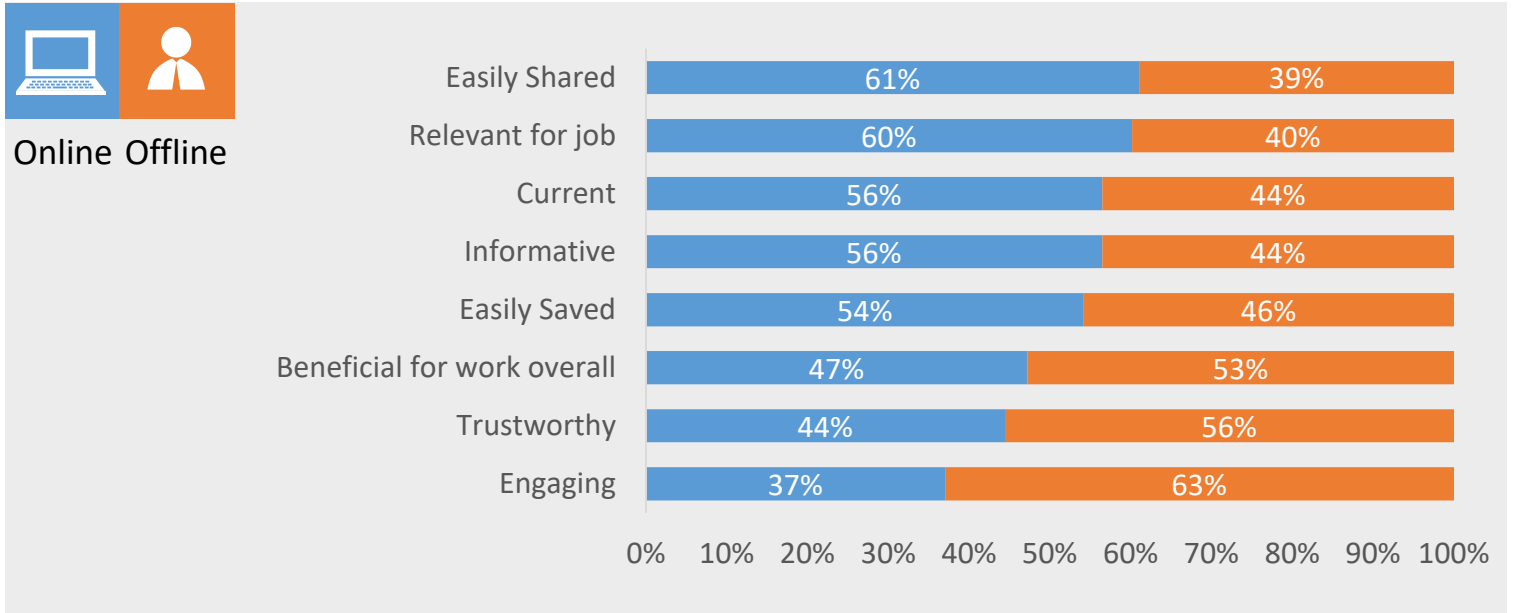
Top 10 Preferred Formats (Q420) n=108



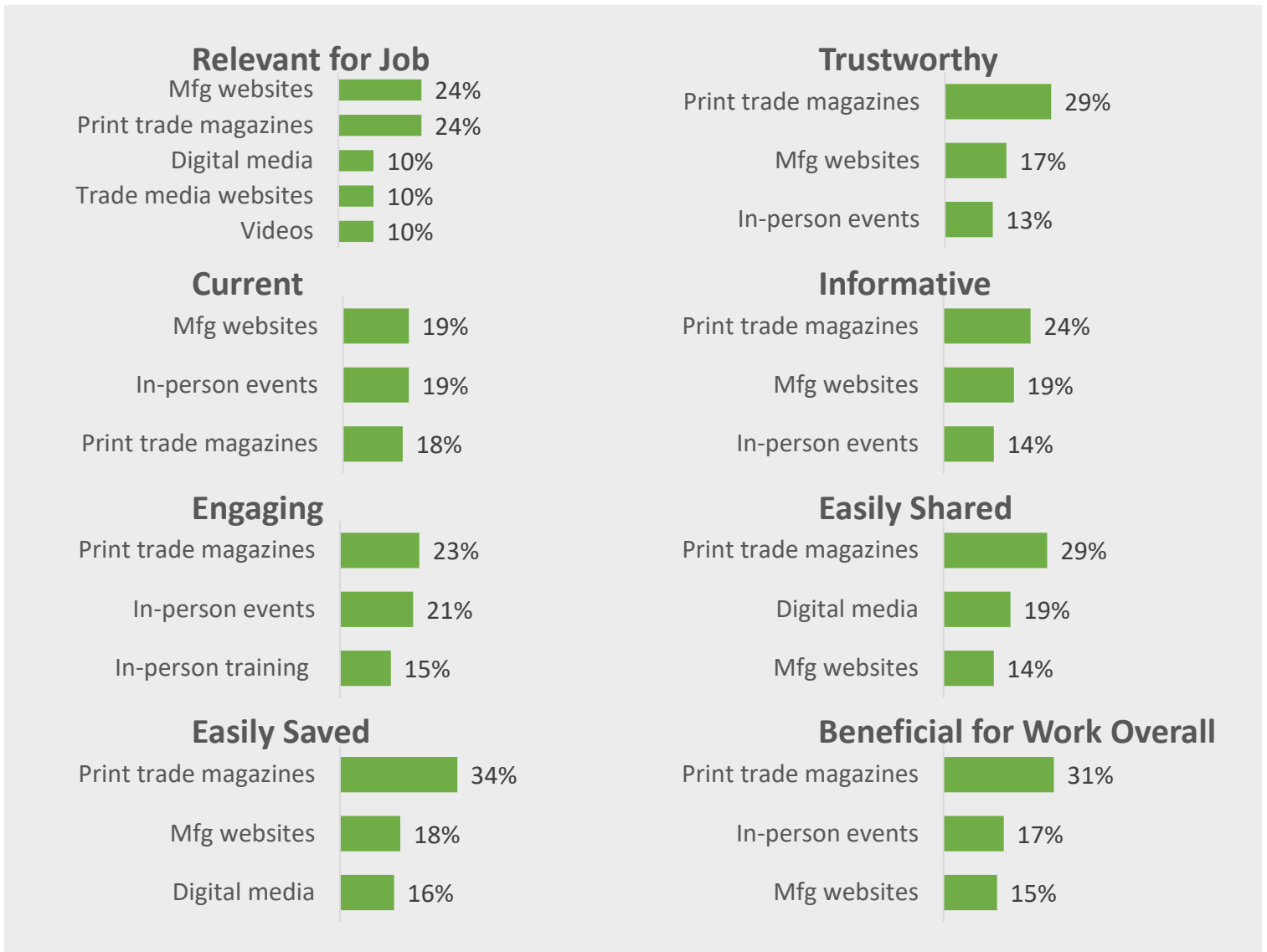
Interaction Expectations Next 12 Months (Q400) n=108



Online/Offline Formats Considered Most... (Q410) n=107-108



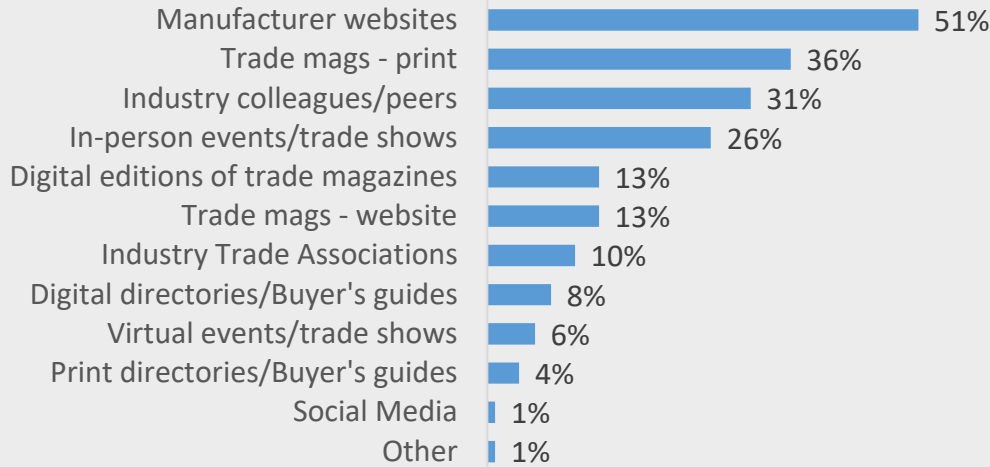
Top 3 Formats Considered Most... (Q410) n=108



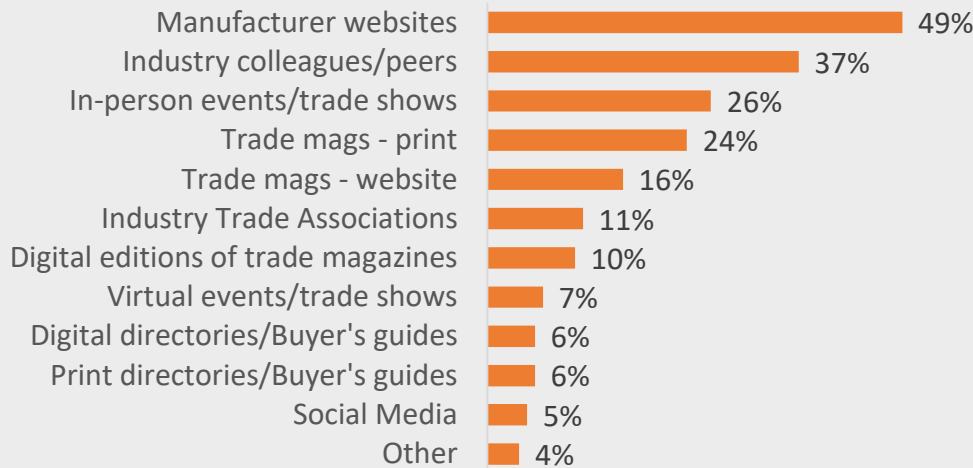
Formats Most Relied on Within Purchase Process (Q370) n=106-107



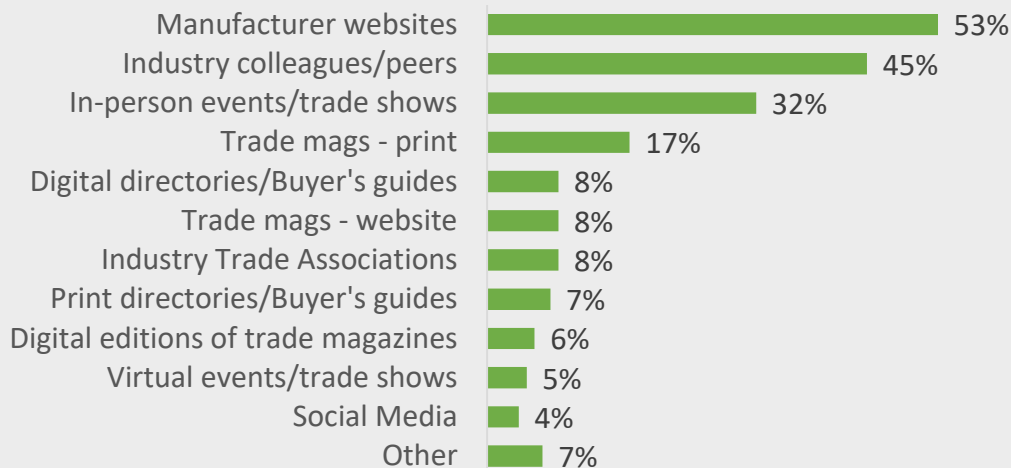
Stage 1: Information Gathering (Sum of Top 2 Mentions)



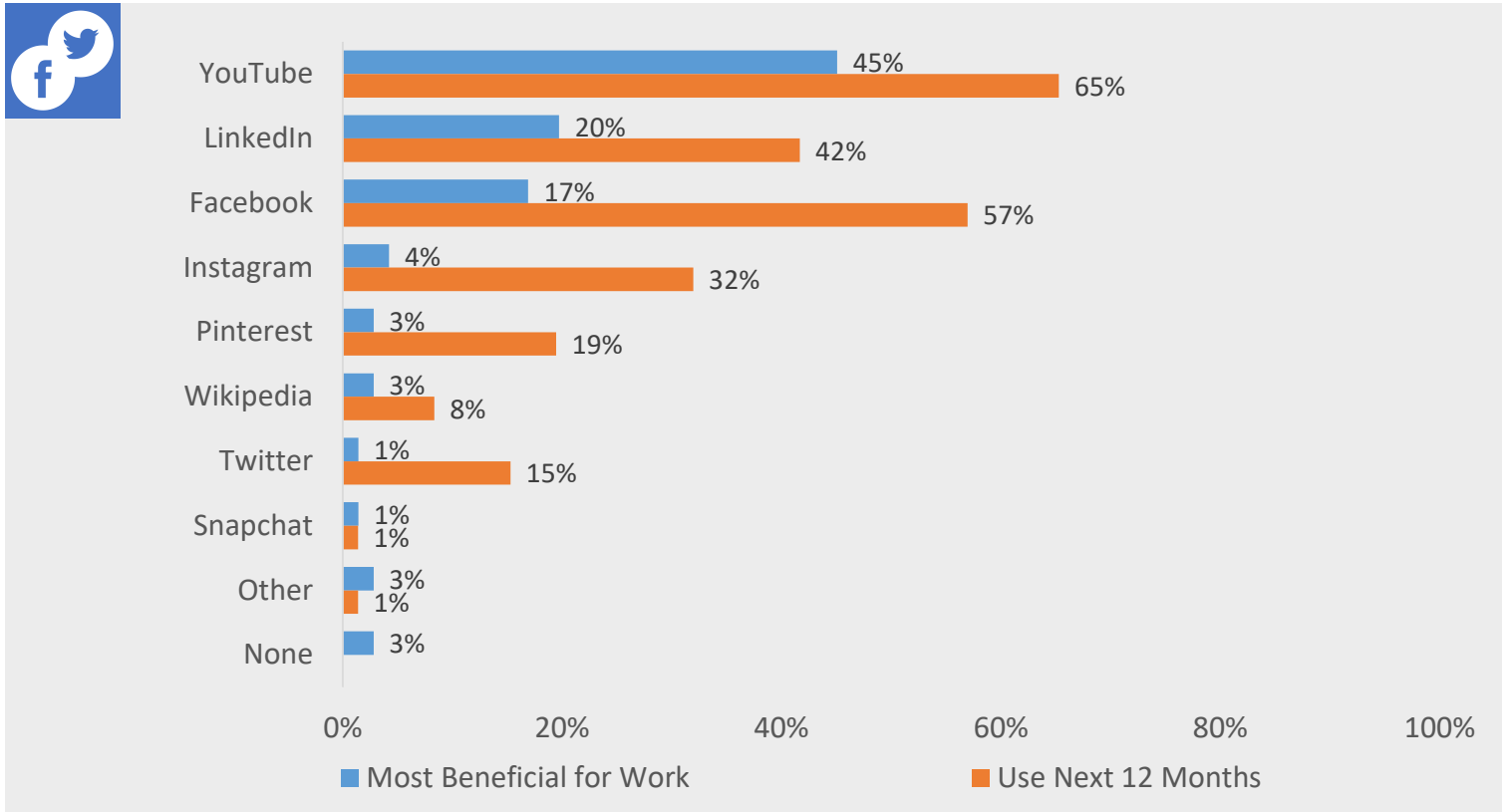
Stage 2: Product/Provider Comparisons (Sum of Top 2 Mentions)



Stage 3: Final Purchase/Specification (Sum of Top 2 Mentions)



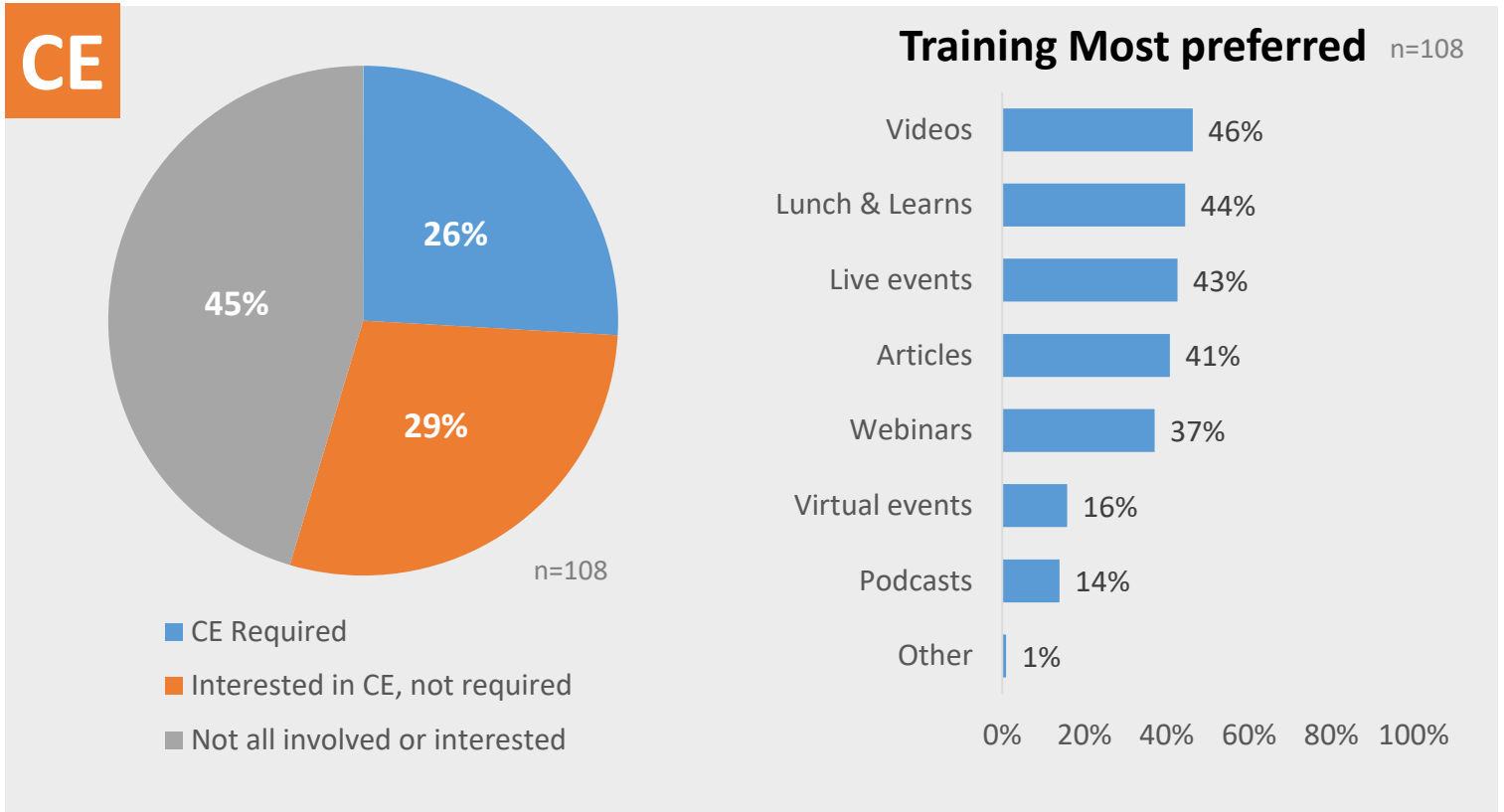
Social Media Usage & Value (Q500/Q510) n=72



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



Continuing Education (Q700/Q720)



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)

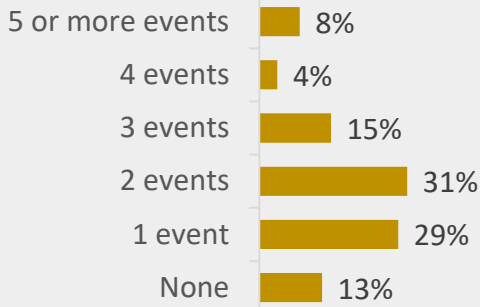
**Most frequent mentions presented*

Annual Number Attended (Q800)
n=107

Industry Event Importance (Q100)
n=106

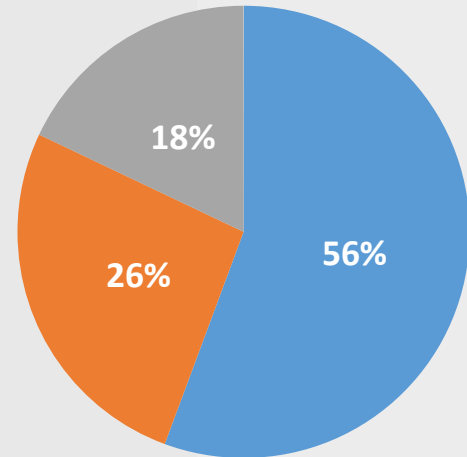


Live Events



Mean: 1.99

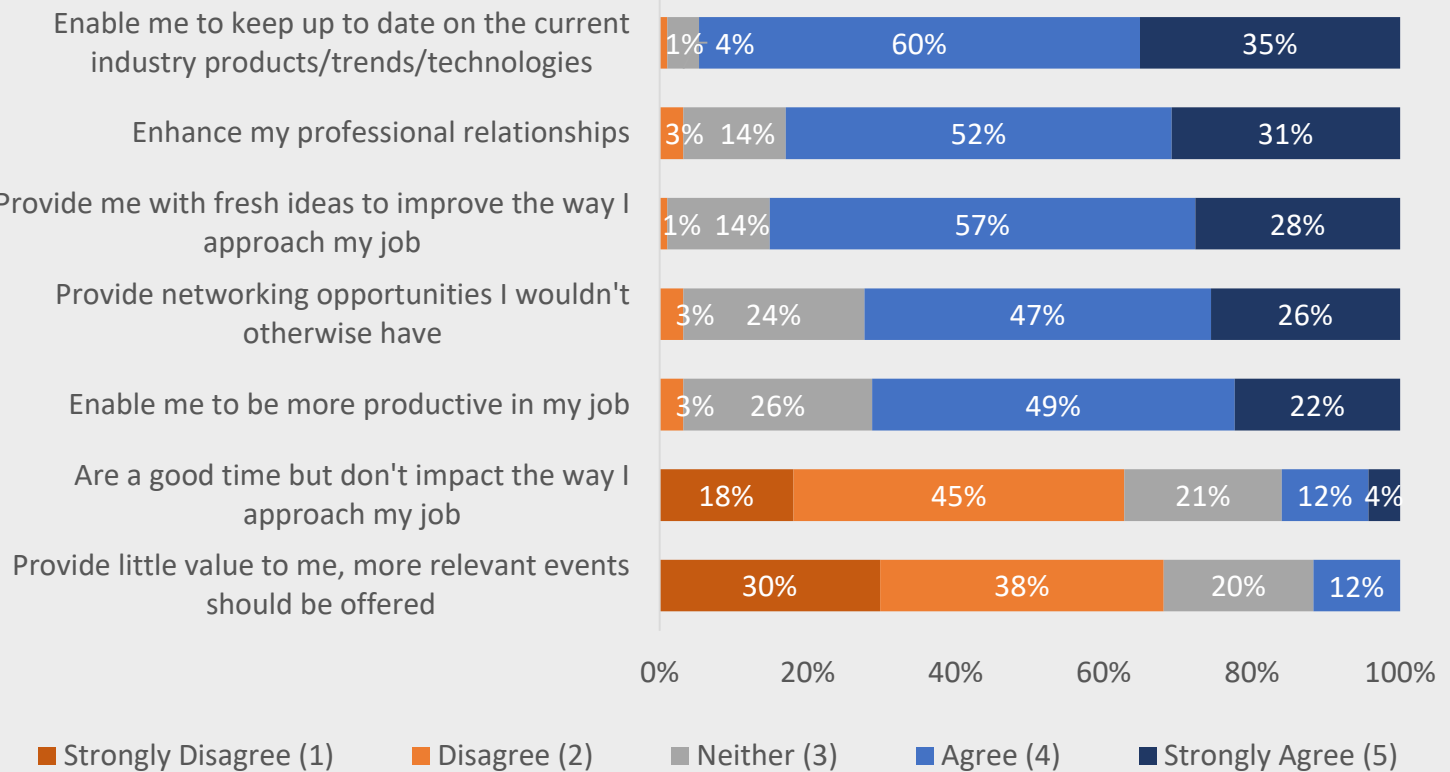
Median: 2.00



Very Important (8-10) Neutral (4-7) Not Important (1-3)

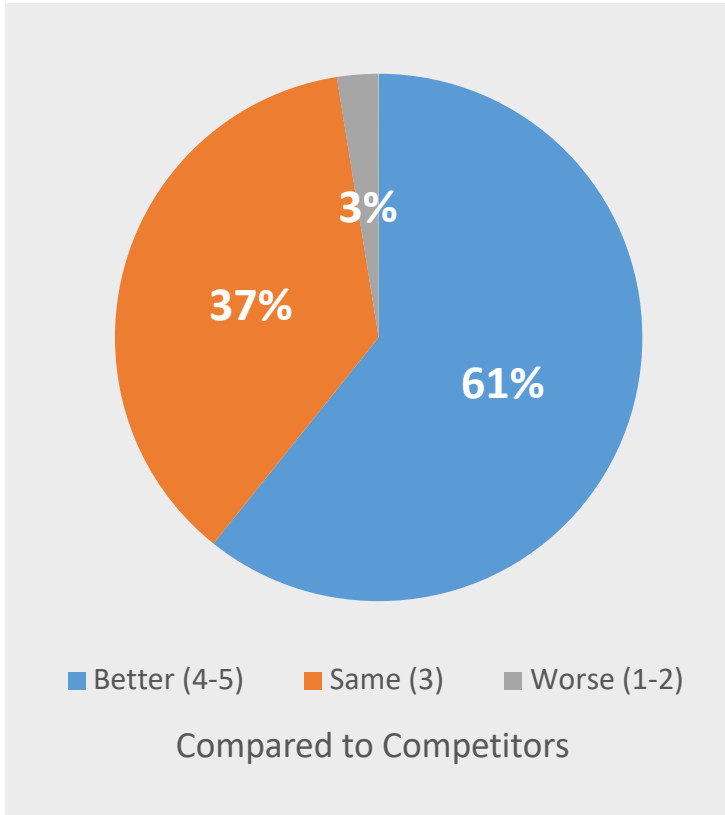
Industry Event Statement Agreement (Q810) n=94

Industry events...

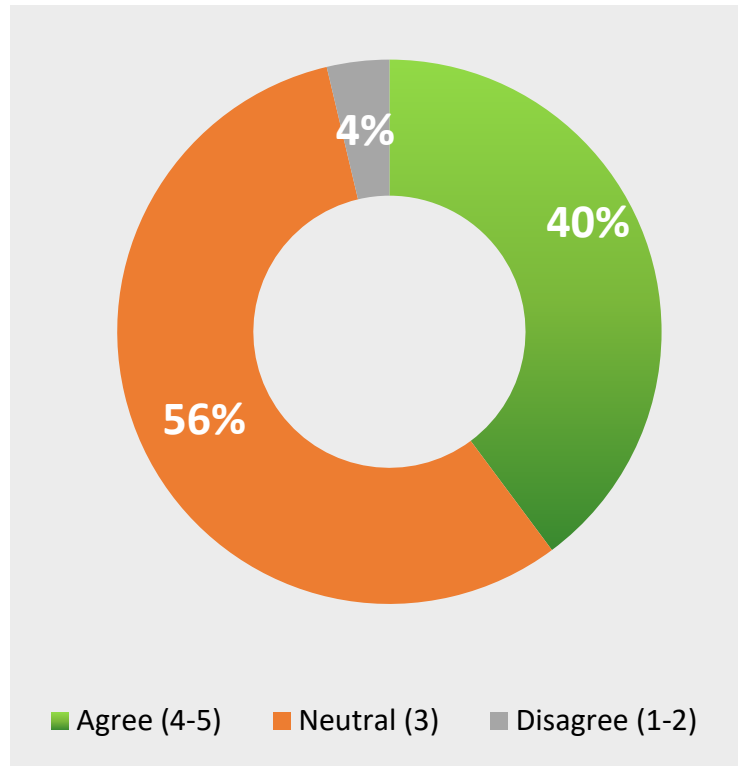


Strongly Disagree (1) Disagree (2) Neither (3) Agree (4) Strongly Agree (5)

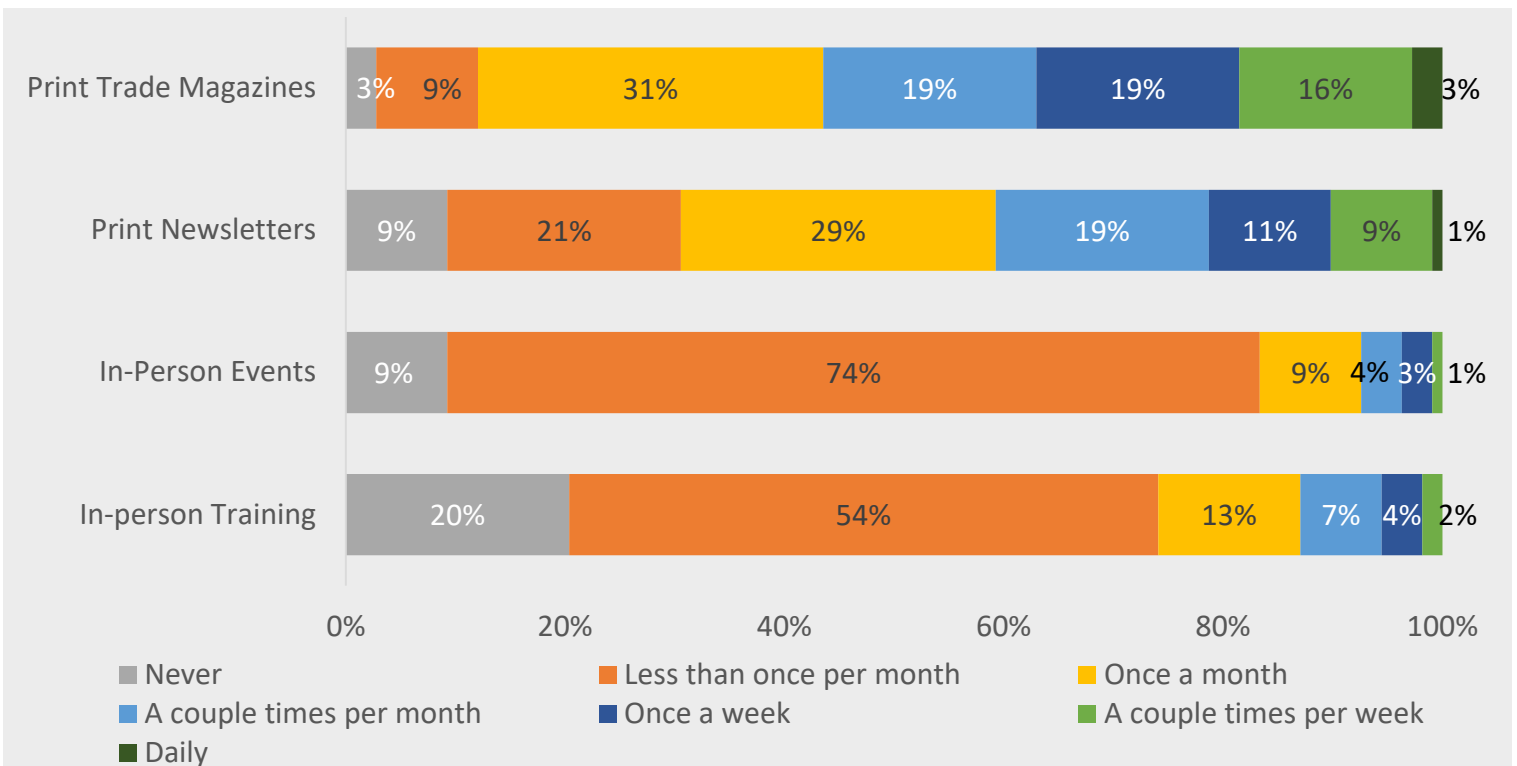
Stone World Events Perception (Q300) n=79



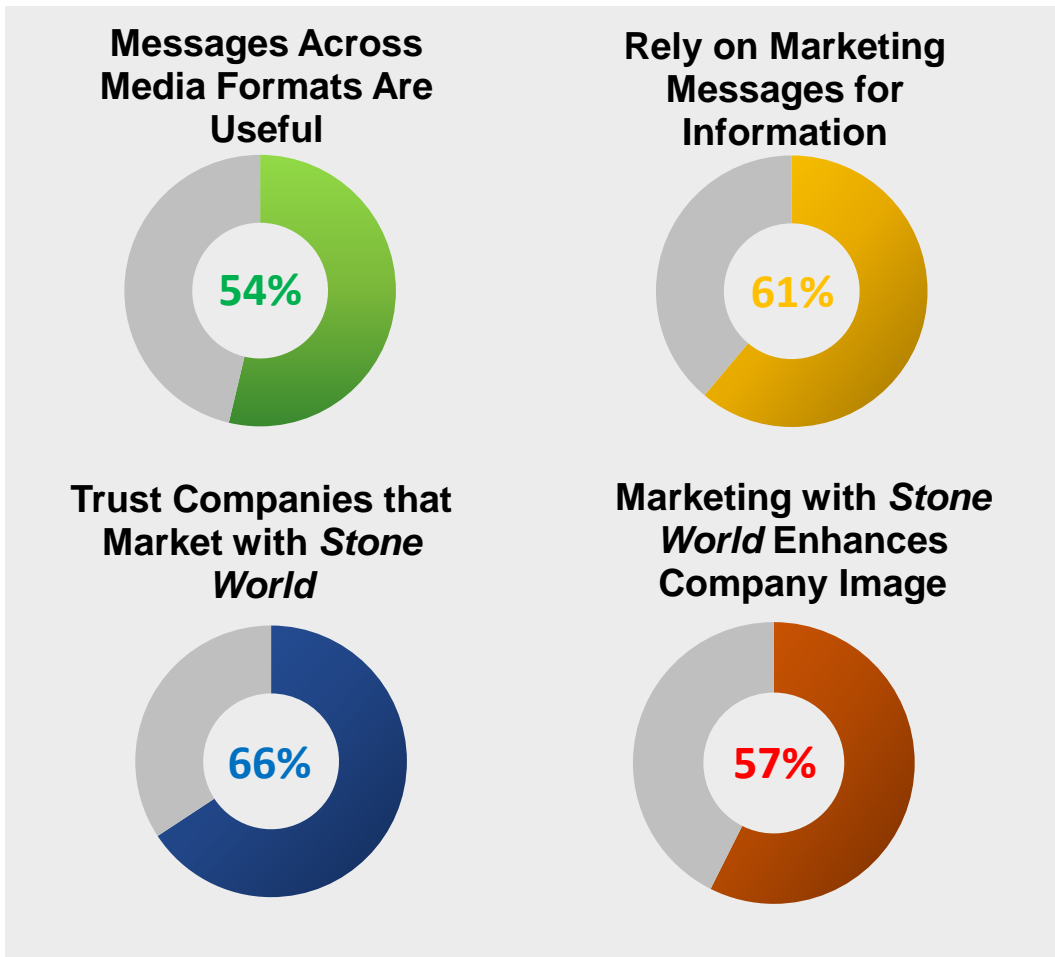
Perception – Stone World Events Are A Positive Experience (Q310) n=108



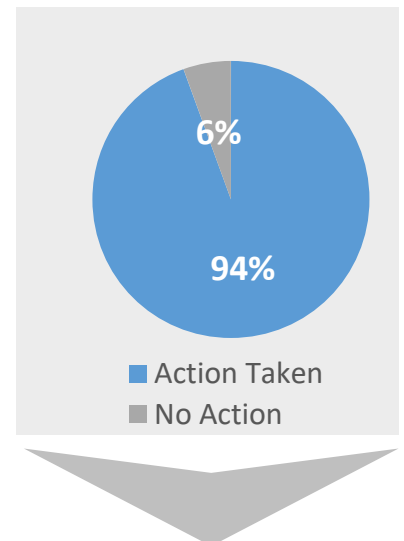
**Interaction Expectations In
Next 12 Months (Q400) n=108**



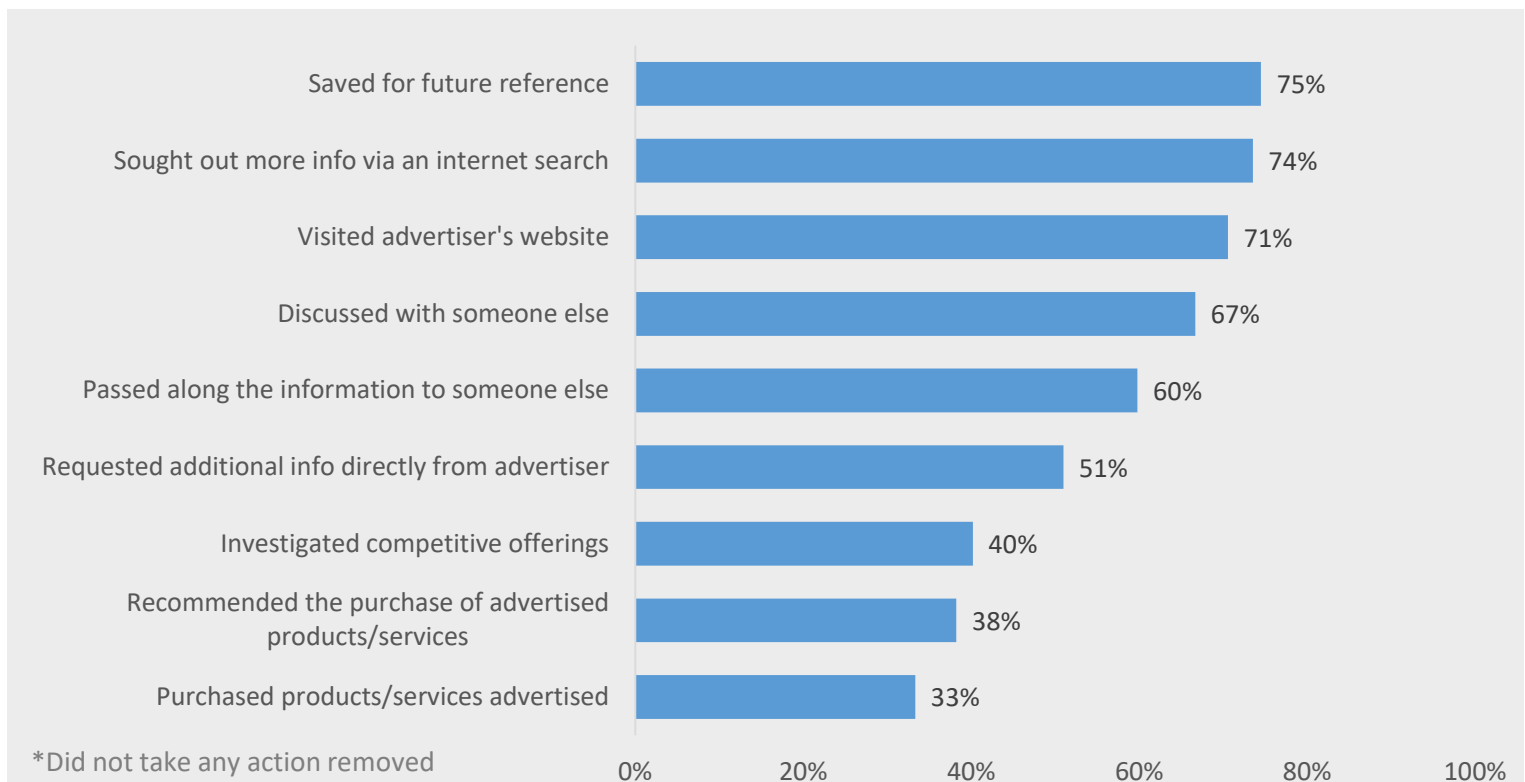
Stone World Advertising Perception Agreement (Q310) n=108



Take Action As a Result of Marketing Communications (Q320) n=108



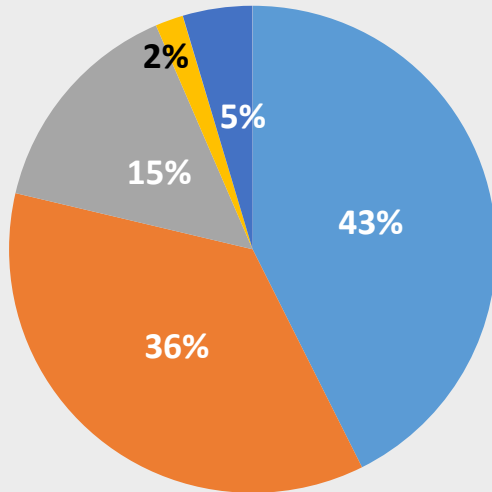
Actions Taken Based on Marketing Communications (Q320) n=102



Audience Reach

Purchase Involvement

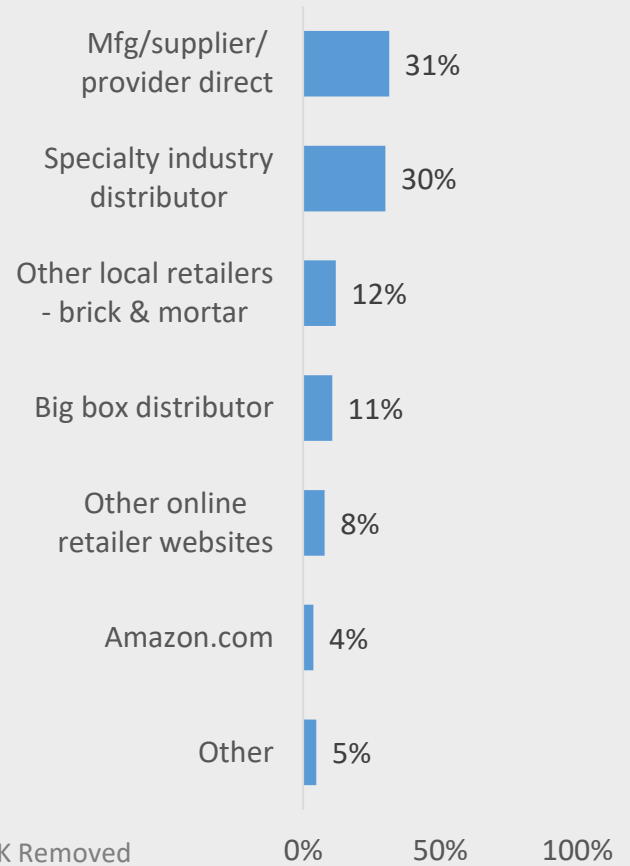
n=108



- Approve/Authorize Purchases
- Select/Specify purchases
- Recommend purchases
- Involved in other ways
- Not involved in purchasing

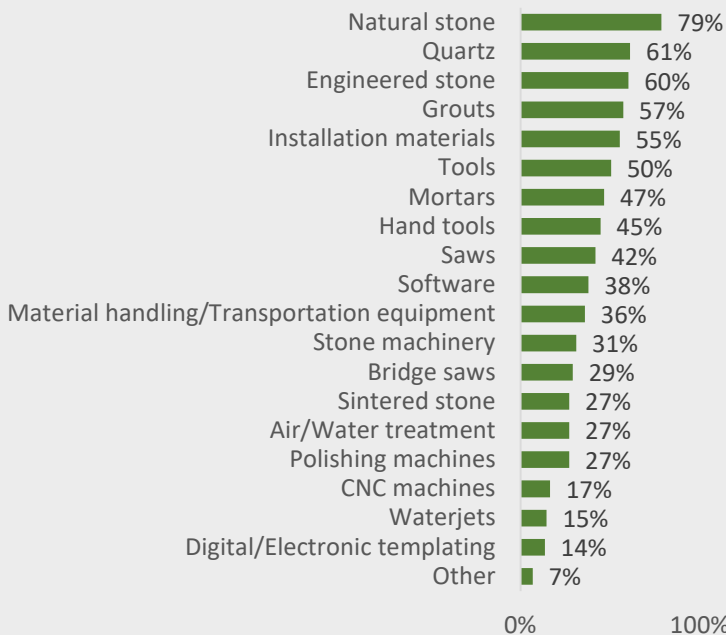
Purchase Channels (Avg %)

n=88



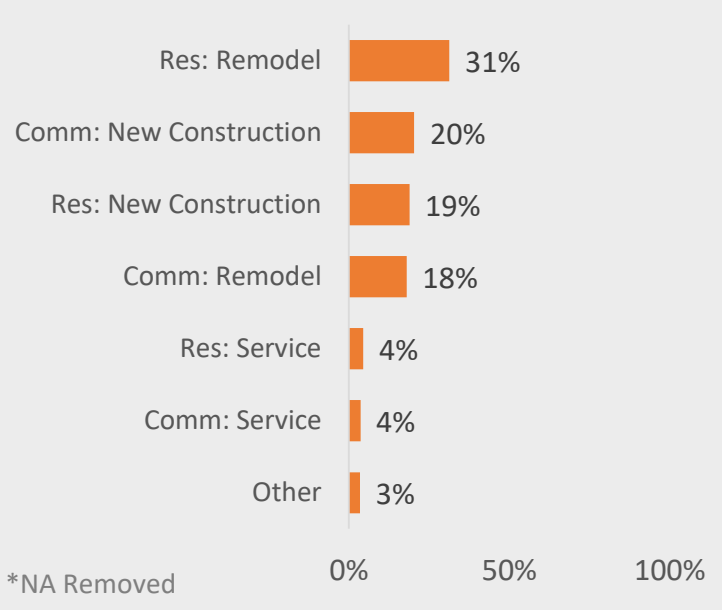
Product Purchase Involvement

n=103



Project Involvement (Avg %)

n=104



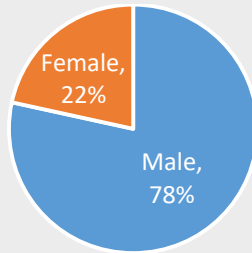
Audience Reach

Reader Profile

Gender



n=102



Years Experience



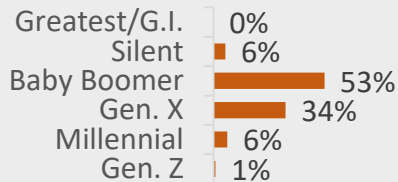
n=103



Generation



n=108

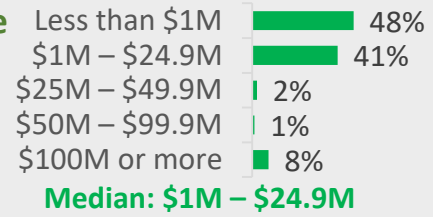


Business Profile

Revenue



n=91



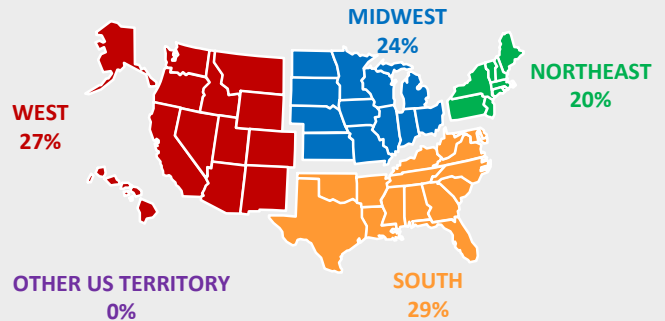
Employees



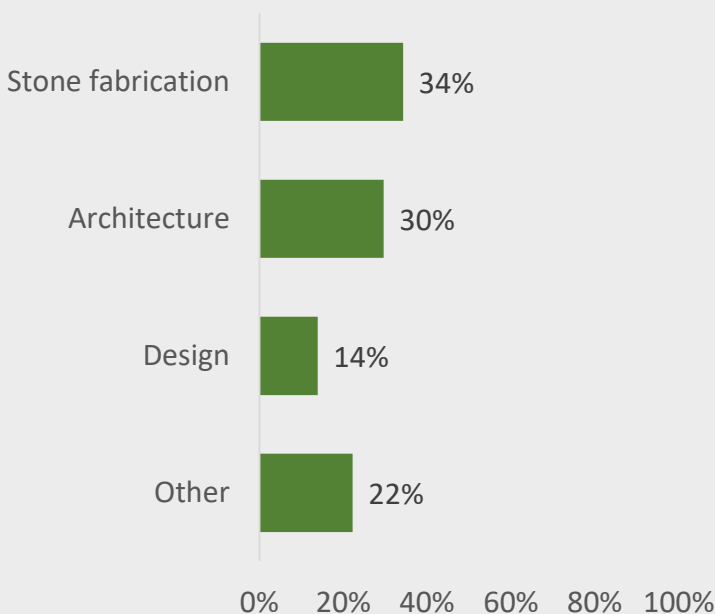
n=103



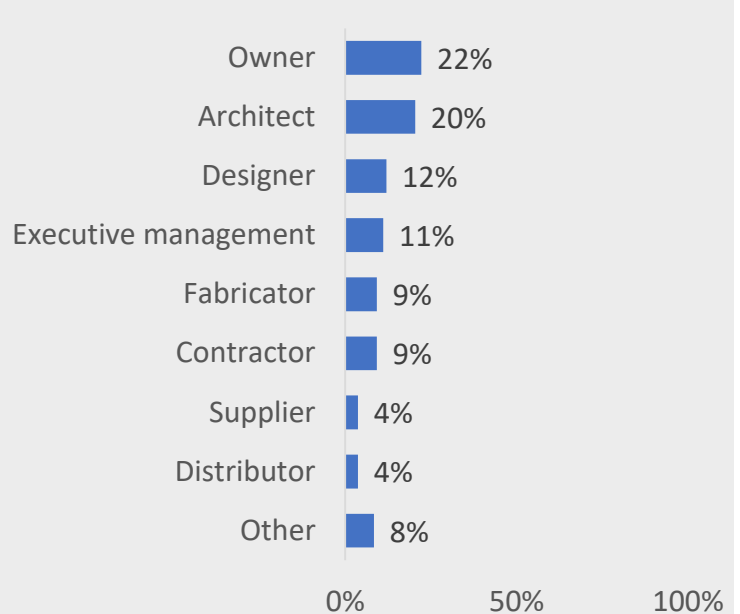
Region n=108



Industry Reach n=108



Job Title n=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

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