Alpha Paving TX is the leading brand of Pave America but facing tough competition from Rose Paving; opportunity in improving search marketing for all Pave Am. brands

SUMMARY

/DIRECTIONAL

			alpha paving	PAVE AMERICA	U.S. PAVEMENT	Brothers Paving & Concrete	TURNER ASPHALT	CINCINNATI ASPHALT	NATIONAL pavement partners	Rose PAVING LLC	ATLANTIC SOUTHERN	SUNLAND ASPHALT	Georgia PAVING	Let's Pave
Website		Total visits - monthly average – *Apr'24 to Mar'25 (K)*	6.2	3.0	4.0	1.8	1.5	1.3	0.9	6.1	1.6	2.2	0.9	2.2
		Total visits - annual average – *Apr'22 to Mar'25 (K)*	52.1	15.2	52.8	15.9	8.1	11.2	13.6	74.1	16.4	20.3	5.8	22.1
		YoY change in total visits	90%	287%	33%	63%	550%	-10%	22%	-5%	133%	34%	87%	75%
		Unique visitors - monthly average – *Apr'24 to Mar'25 (K)*	2.9	1.6	2.1	0.9	0.7	0.5	0.4	2.7	0.8	1.0	0.4	1.1
		Unique visitors - annual average – *Apr'22 to Mar'25 (K)*	23.0	7.9	27.5	8.2	4.3	5.5	6.8	37.2	8.8	10.9	2.9	11.6
		YoY change in unique visitors	104%	276%	27%	37%	351%	-36%	-8%	-27%	95%	18%	82%	54%
	Traffic Sources	Direct visits	26%	51%	42%	30%	29%	38%	62%	47%	41%	32%	42%	34%
		Search (organic + paid)	65%	36%	30%	56%	56%	50%	25%	45%	25%	52%	42%	55%
		Social media	7%	9%	8%	9%	10%	7%	6%	4%	7%	9%	7%	7%
		Display ads	0.2%	0.2%	5%	0.4%	0.4%	0.4%	0.3%	0.4%	0.3%	0.3%	0.6%	0.3%
		Referrals	3%	4%	16%	5%	4%	4%	7%	4%	26%	7%	8%	4%
		Others, such as email	0%	0%	0%	0%	0%	0%	0.1%	0%	0%	0%	0.1%	0%
		Pages per visit	1.4	1.8	1.7	2.4	3.9	4.6	1.6	2.3	2.1	2.2	3.2	2.0
		Avg. visit duration *(minutes)*	0.6	0.6	0.7	2.1	4.3	5.3	0.6	1.9	1.0	1.0	2.3	1.1
		Bounce rate	77%	53%	63%	43%	41%	39%	63%	45%	61%	47%	48%	56%
SEO/ SEM	SEO	# keywords website ranks in top 100 results for *(K)*	2.7	0.6	0.6	0.8	0.4	0.2	0.1	7.6	0.5	0.9	0.3	0.6
		Organic traffic (indexed with 100=max)	33	11	8	9	6	3	2	100	9	37	3	5
	SEM	Cost per Click ($) *(last 30 days)*	-	-	6.8	-	-	-	-	6.4	-	-	-	-
		Paid search traffic (indexed) *(last 30 days)*	-	-	16	-	-	-	-	100	-	-	-	-
		Paid search spend (indexed) *(last 30 days)*	-	-	17	-	-	-	-	100	-	-	-	-

Lagging ← → *Leading*

Source: SimilarWeb, SEMRush

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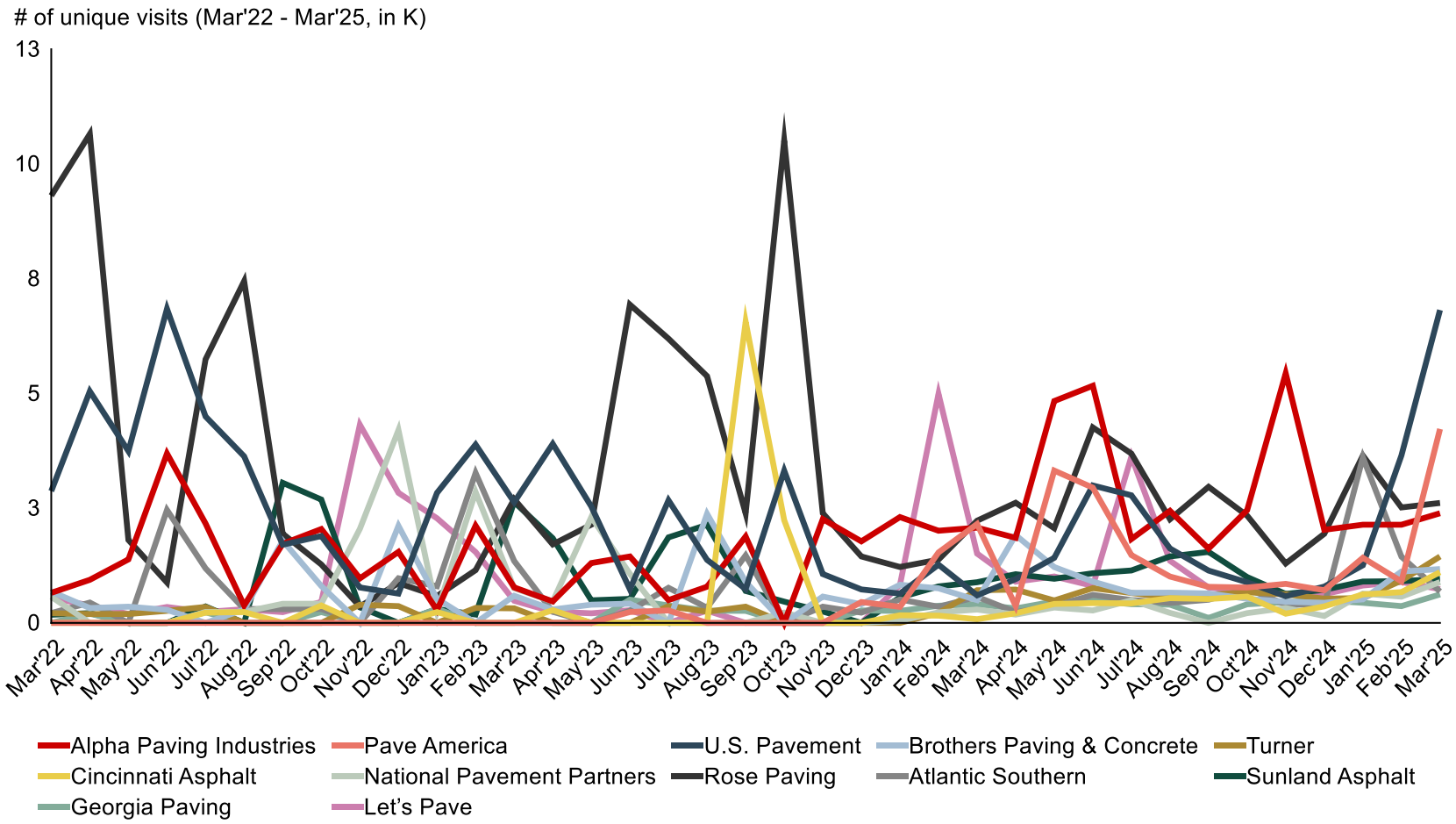
Unique Visits: Alpha Paving TX leads on scale with a strong YoY growth; closest non-Pave America competitor is Rose Paving

WEB-TRAFFIC | UNIQUE VISITS

/DIRECTIONAL



		Avg. Unique Monthly Visitors (K, LTM)	Change YoY	Visits per Unique Visitor
Pave America	alpha paving industries	**2.9**	***104%***	***2.2***
	PAVE AMERICA	1.6	*276%*	*1.9*
	U.S. PAVEMENT	2.1	*27%*	*1.9*
	Brothers Paving & Concrete	0.9	*37%*	*2.2*
	TURNER ASPHALT	0.7	*351%*	*2.2*
	CINCINNATI ASPHALT	0.5	*-36%*	*2.5*
	NATIONAL pavement partners	0.4	*-8%*	*2.6*
Rose Paving	Rose PAVING LLC	2.7	*-27%*	*2.3*
	ATLANTICSOUTHERN PAVING AND SEALCOATING	0.8	*95%*	*2.0*
Sunland Asphalt	SUNLAND ASPHALT	1.0	*18%*	*2.1*
	Georgia PAVING	0.4	*82%*	*2.2*
Let's Pave	Let'sPave	1.1	*54%*	*2.1*

Note: LTM: Apr'24 to Mar'25; YoY change refers to % change in monthly average no. of unique visits in LTM (Apr'24 to Mar'25) vs. Previous LTM (Apr'23 to Mar'24)
Source: SimilarWeb

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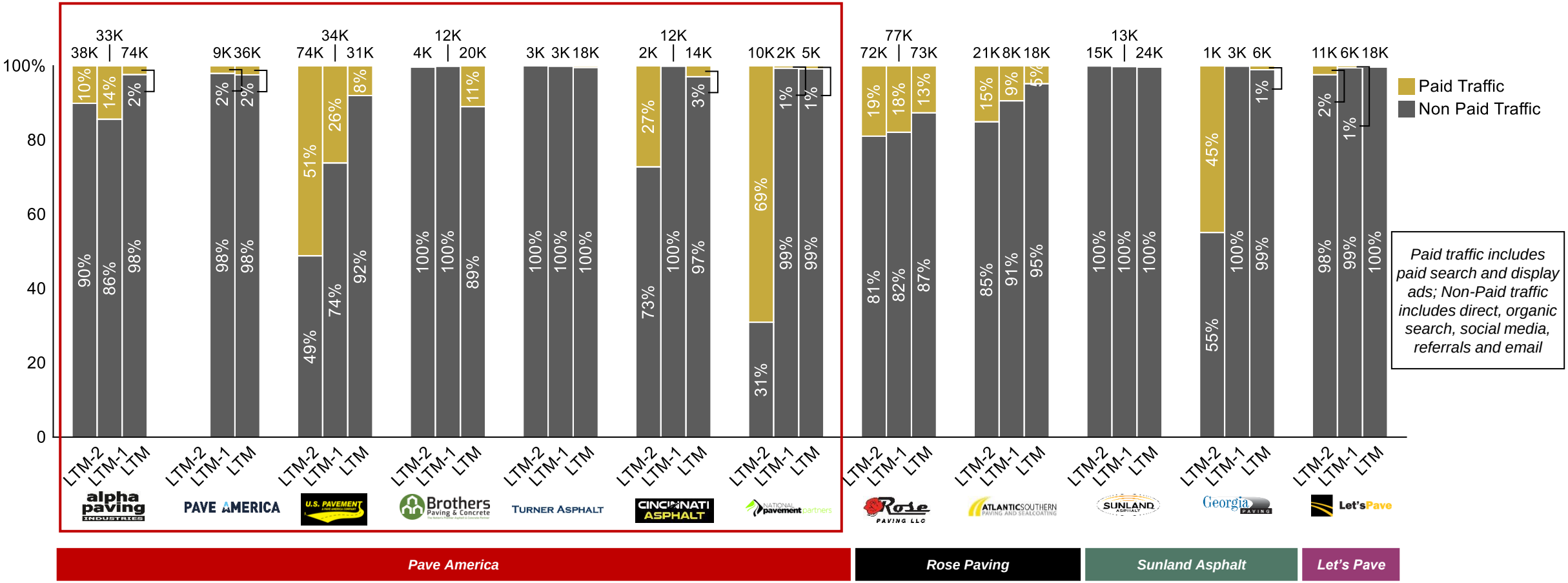
Traffic sources evolution: All the brands seeing a decline in paid-media-generated traffic hinting at reduced paid media investments industry-wide

WEB-TRAFFIC SOURCES

DIRECTIONAL

Share % of Paid vs Non Paid Visits (K)



Paid traffic includes paid search and display ads; Non-Paid traffic includes direct, organic search, social media, referrals and email

Note: LTM: Apr'24 to Mar'25; LTM-1: Apr'23 to Mar'24; LTM-2: Apr'22 to Mar'23; Bars sorted basis LTM visits
Source: SimilarWeb

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Traffic channels: Similar mix across industry; Direct and Organic search driving more than 80% of the traffic; Social responsible for 5-10%

WEB-TRAFFIC SOURCES

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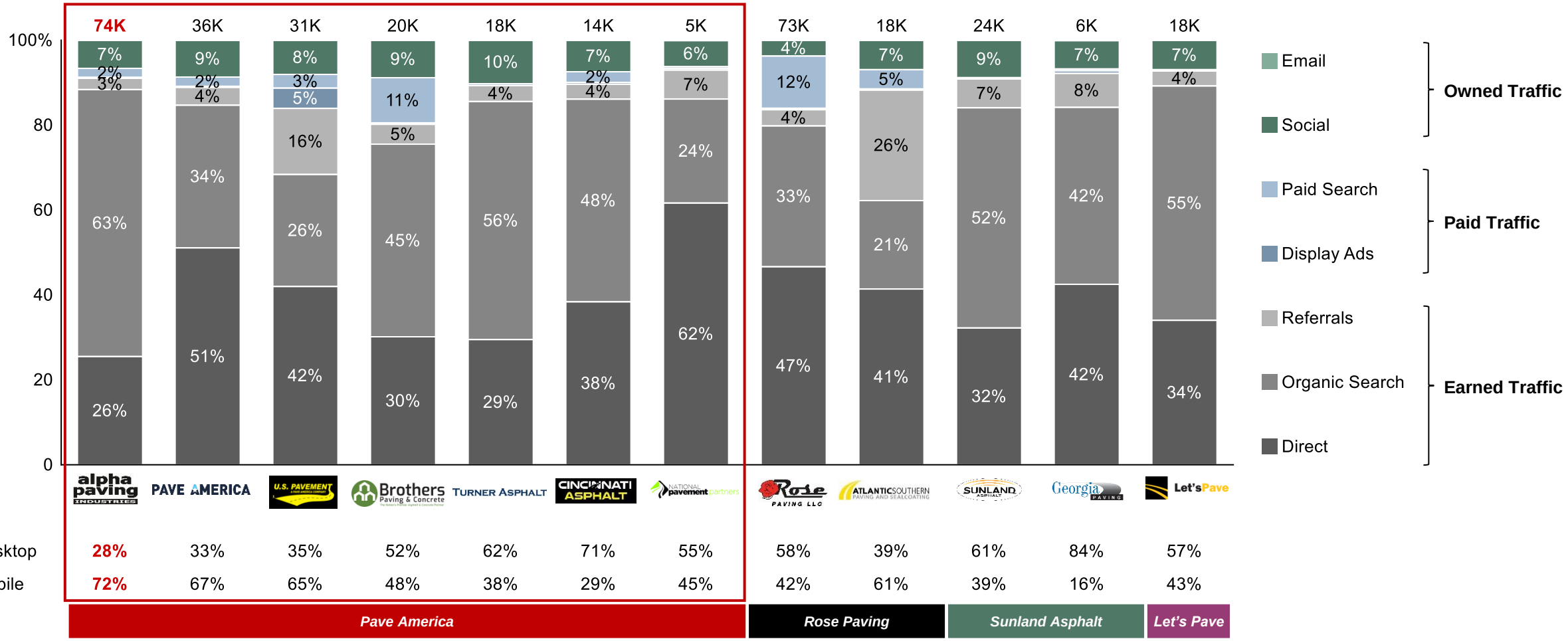
% visits per channel (LTM, Apr'24 - Mar'25)



	Pave America							Rose Paving		Sunland Asphalt		Let's Pave
Desktop	28%	33%	35%	52%	62%	71%	55%	58%	39%	61%	84%	57%
Mobile	72%	67%	65%	48%	38%	29%	45%	42%	61%	39%	16%	43%

Source: SimilarWeb

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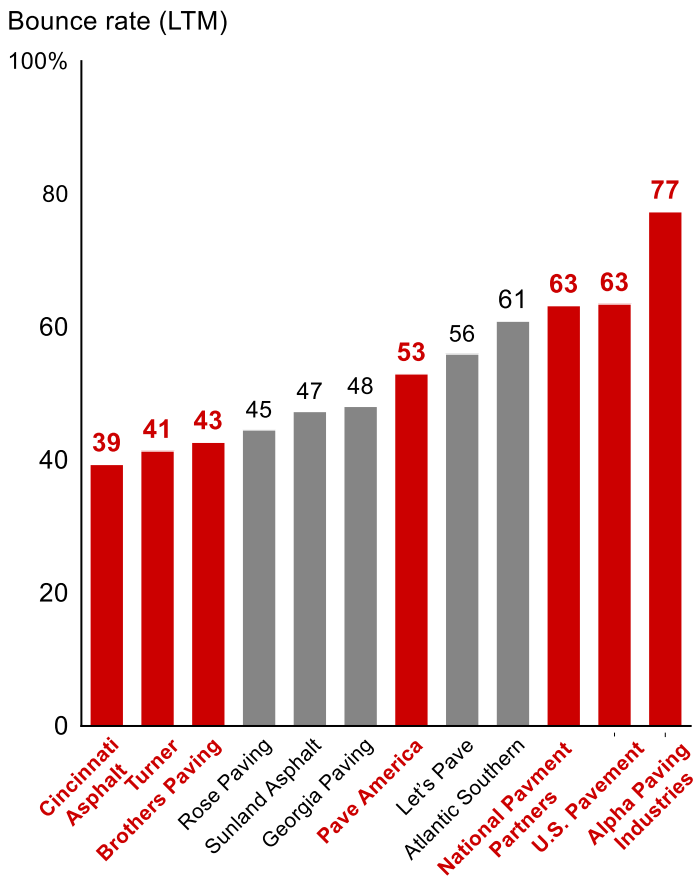
Visitor engagement: Pave America brands can enhance user engagement through faster load times, intuitive design, and compelling content strategy

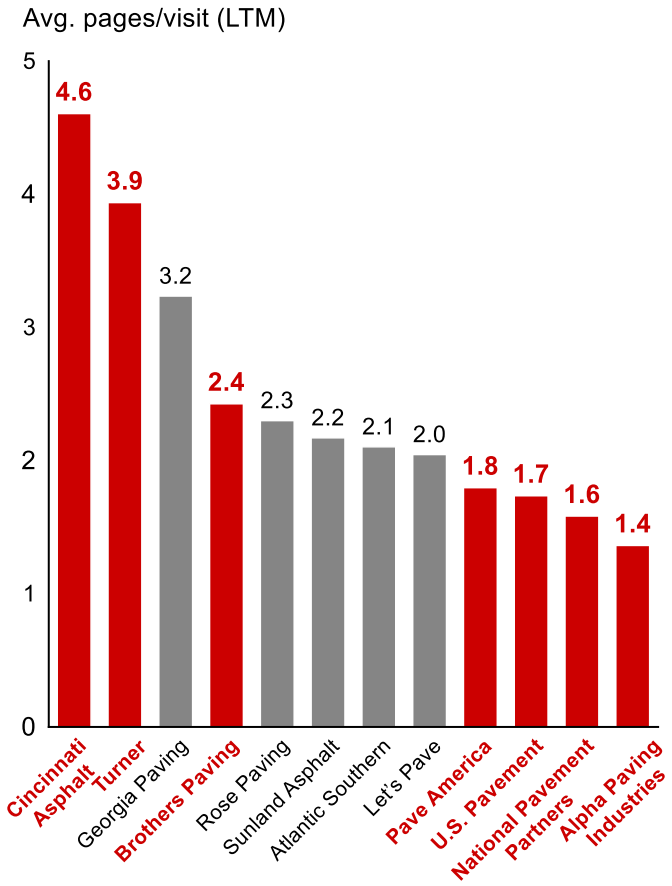
WEB-TRAFFIC ENGAGEMENT

/DIRECTIONAL

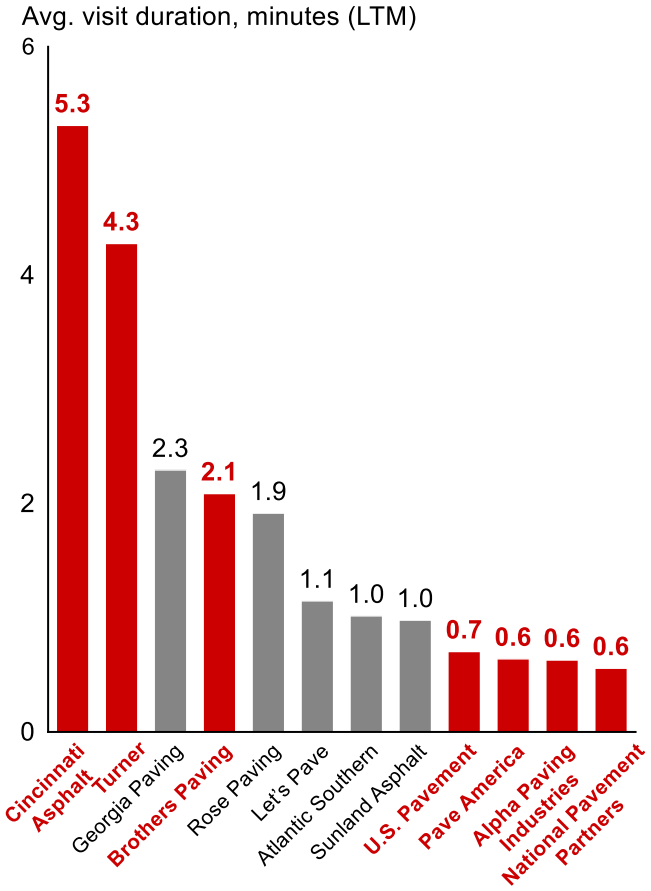
Bounce rate (lower the better)



of pages visited per visit



Average Visit Duration



Note: LTM is Apr'24-Mar'25
Source: SimilarWeb

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Cross-Purchase: Certain Pave America sub-brands have high overlap within each other but limited overlap with competitors; Alpha Paving attracts high %age of visitors from sub-brands

WEB-TRAFFIC OVERLAP

DIRECTIONAL

Reading-aid: Alpha paving and Pave America share 'X' number of visitors. That 'X' is 4% of Alpha paving's traffic and 7% of Pave America's traffic.

Also visited…

Visitors to…		Pave America							Competitors
		alpha paving	PAVE AMERICA	U.S. PAVEMENT	Brothers Paving & Concrete	TURNER ASPHALT	CINCINNATI ASPHALT	NATIONAL pavement partners	Rose PAVING LLC
Pave America	alpha paving	-	4%	0%	5%	9%	6%	0%	3%
Pave America	PAVE AMERICA	7%	-	0%	5%	8%	4%	3%	8%
Pave America	U.S. PAVEMENT	0%	0%	-	0%	0%	0%	0%	5%
Pave America	Brothers Paving & Concrete	13%	7%	0%	-	21%	12%	0%	0%
Pave America	TURNER ASPHALT	19%	10%	0%	18%	-	14%	0%	5%
Pave America	CINCINNATI ASPHALT	20%	7%	0%	16%	22%	-	0%	0%
Pave America	NATIONAL pavement partners	0%	15%	0%	0%	0%	0%	-	0%
Comps	Rose PAVING LLC	1%	2%	1%	0%	1%	0%	0%	-

Note: Based on desktop data only; Average %s over LTM (Apr'24 – Mar'25); Website visitors for Sunland, Georgia paving, Atlantic Southern and Let's pave had 0% overlap with all other players, hence not shown on the slide | Source: SimilarWeb

1-5% | 6-10% | >10%

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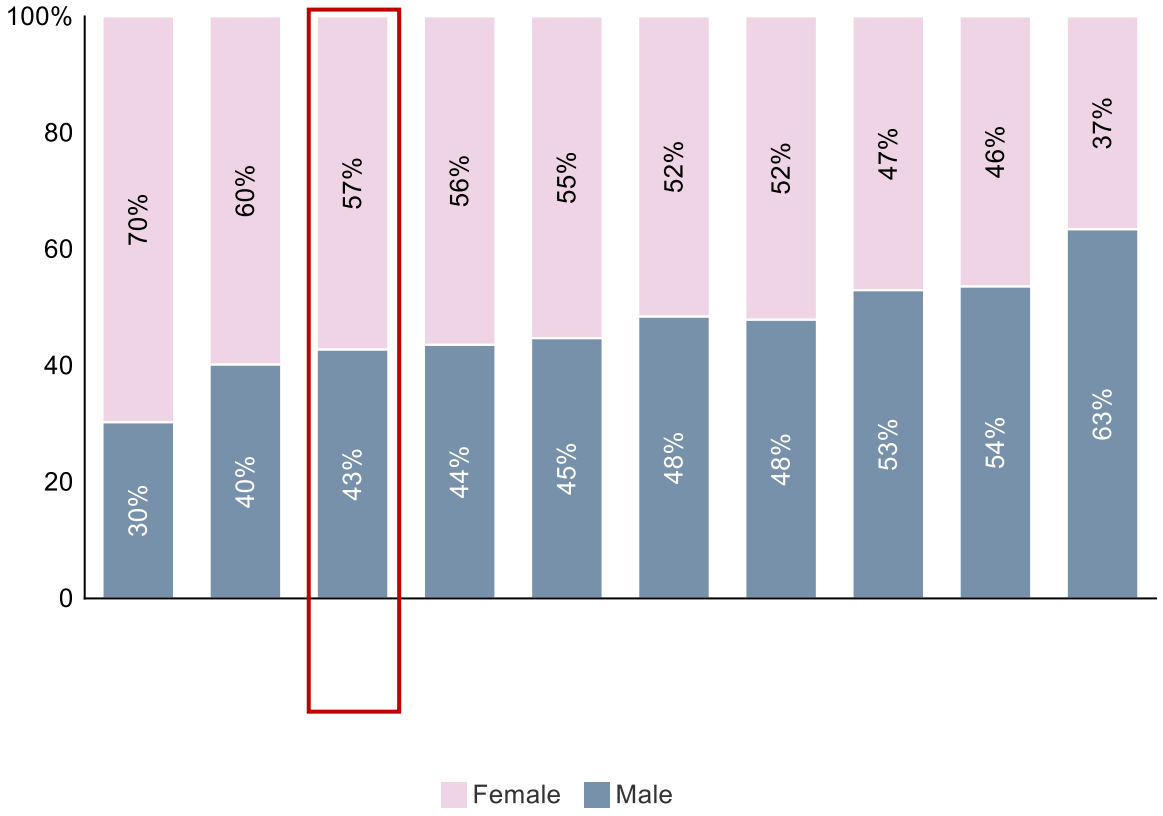
Demographics: Vigour sees strong engagement from 25–34-year-olds and a balanced gender split; opportunity to strengthen appeal among Gen-Z audiences

WEB-TRAFFIC | DEMOGRAPHICS

/DIRECTIONAL

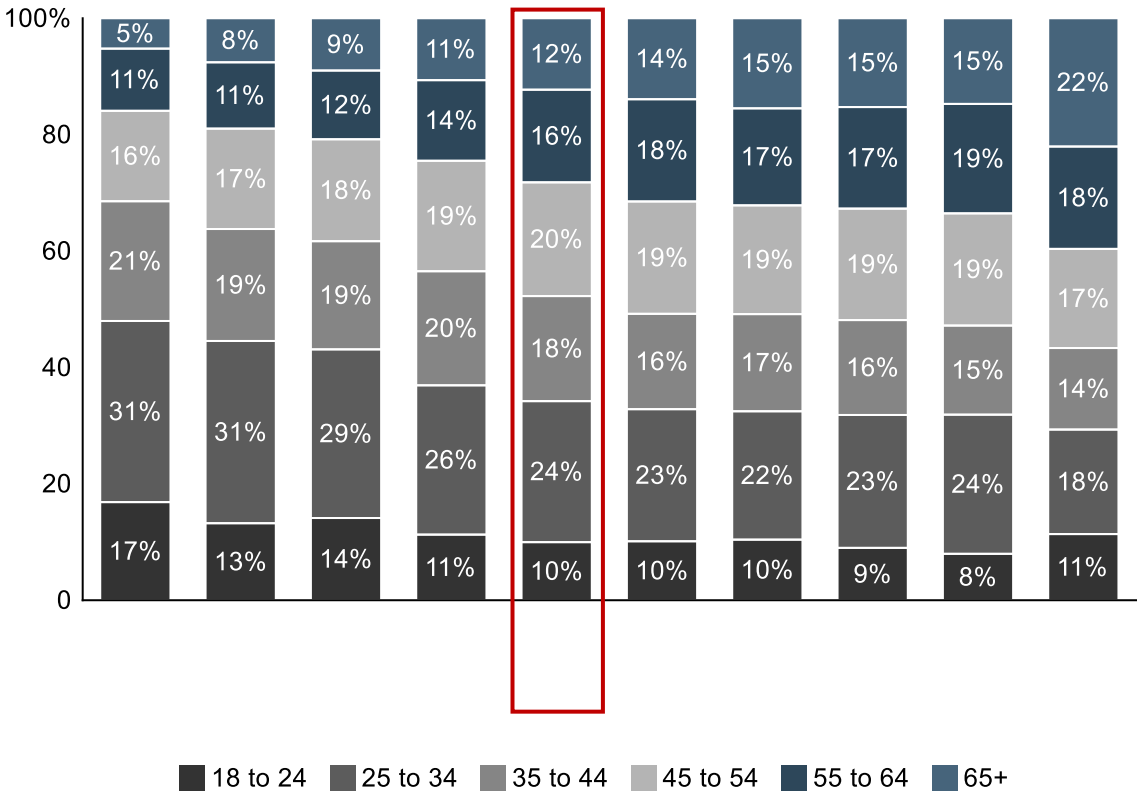
Gender split varies across brands – Vigour receives a slightly higher share of female visitors

Visits split by gender (Jan'22-Feb'25)



18 to 54-year-olds make up ~70% of visitors across brands; Vigour's largest audience is 25 to 34-year-olds

Visits split by age group (Jan'22-Feb'25)



Note: LHS chart is sorted by the highest share of female visitors; RHS chart is sorted is sorted by the highest share of visitors aged 18–54
Source: SimilarWeb

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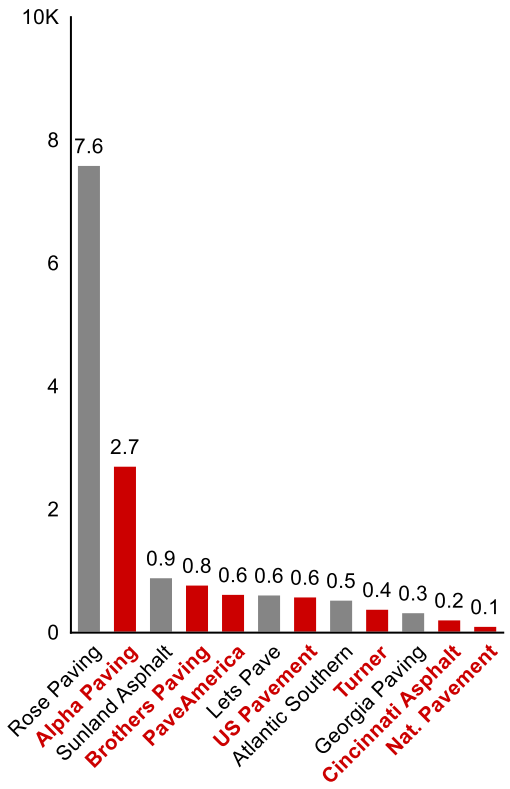
SEO: Most Pave America brands have potential to improve organic visits and CTR

ORGANIC SEARCH

DIRECTIONAL

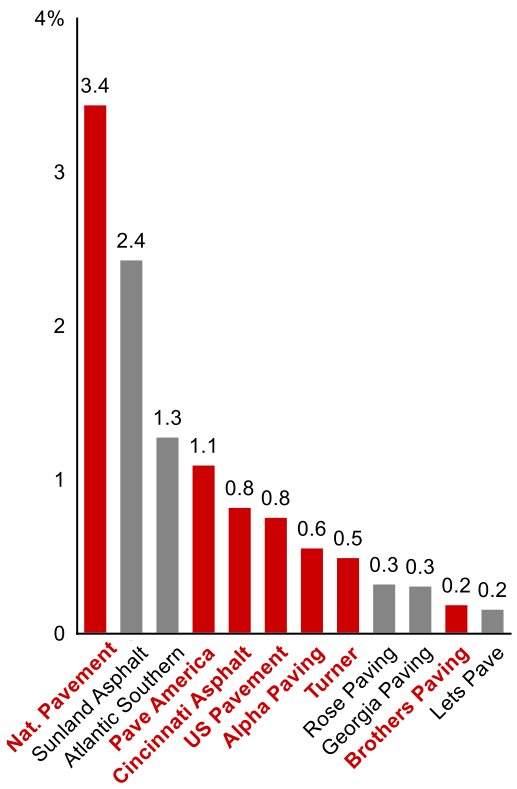
Rose Paving significantly ahead of peers in terms of # of keywords

Number of keywords for which website ranks in top 100 (K)



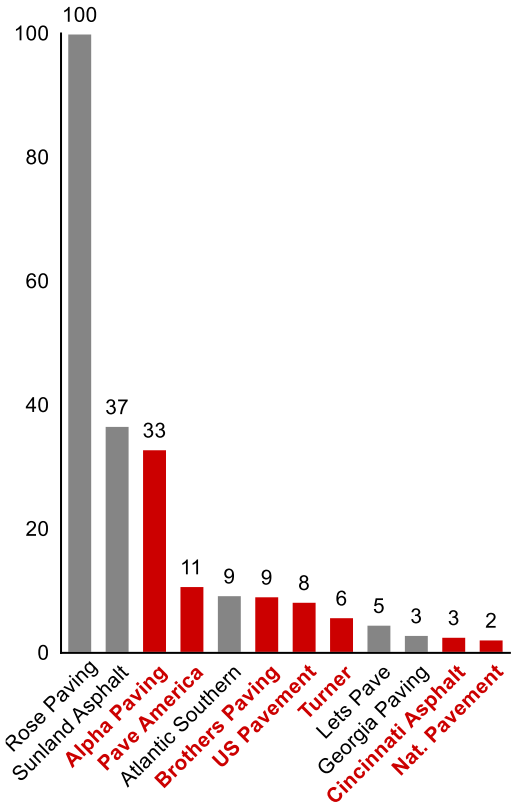
National Pavement Partners has the highest CTR

Click Through Rate (%)



Rose Paving leads players on traffic as well

Organic traffic (indexed to highest)



Commentary

- Organic search optimization is critical as it helps in developing a channel that can provide **free traffic in the long run**
  - It does not require investments in media buying rather involves development of content and resources to optimize the website
- Most of the Pave America brands **trail across all metrics**, indicating **untapped growth potential.**

Source: SEMrush, data for the last 30 days ending 17th April, 2025

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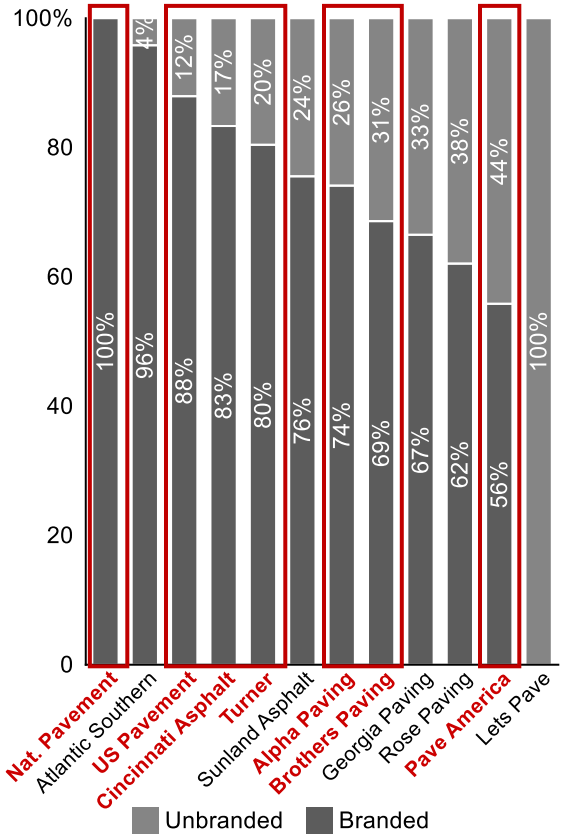
SEO: Pave America brands have opportunity to focus on unbranded terms to unlock the next set of potential customers

ORGANIC SEARCH

DIRECTIONAL

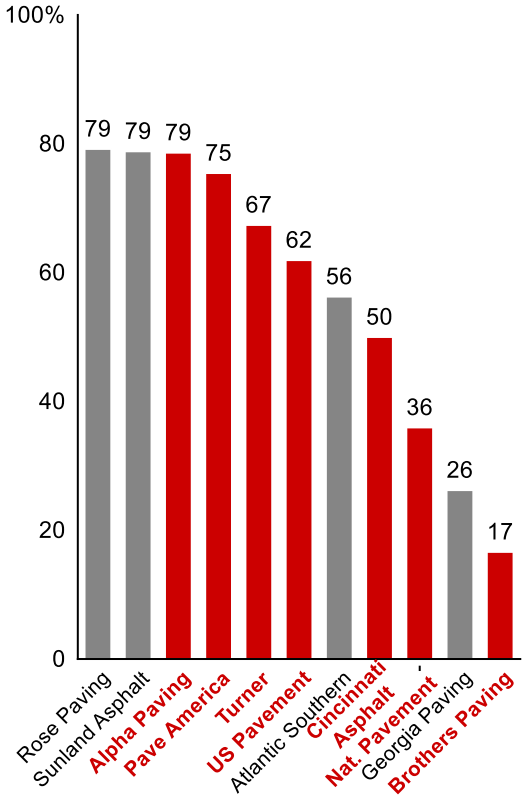
Pave America group drives traffic mainly via unbranded terms

Branded vs unbranded traffic share (%)



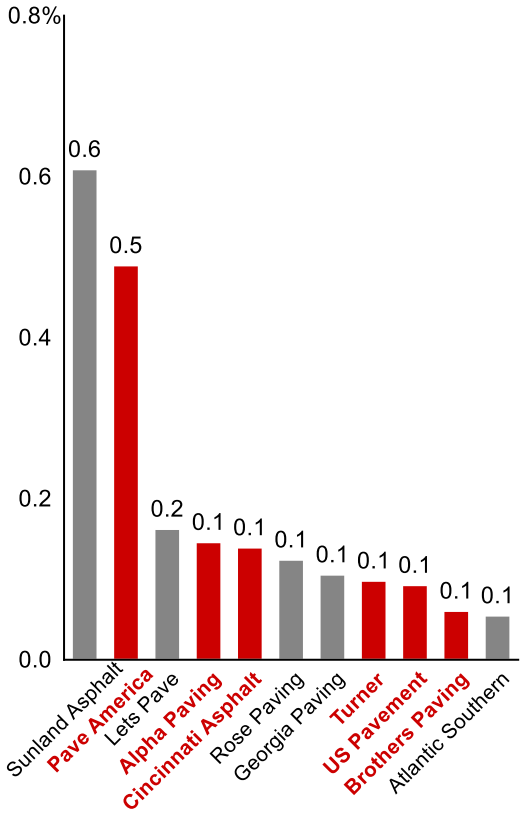
Alpha Paving & Pave America are positioned well on Branded CTR

Branded Click Through Rate (%)



Pave America behind peers in Unbranded CTR (avg ~0.1%)

Unbranded Click Through Rate (%)



Commentary

- Pave America brands **mostly capture** traffic through **branded keywords**, limiting its reach
- Opportunity for brands like National Pavement Partners, US Pavement, and Turner to focus **on unbranded search visibility**, to **boost** their respective **brand visibility** resulting in better reach
- Compared to peers, all the Pave America brands show **weaker branded click-through rate performance**
  - Branded CTR reflects **user intent and loyalty**—while Cincinnati Asphalt and Brothers Paving lag peers, enhancing this metric offers a **clear path to stronger brand engagement and conversions**.

Note: National Pavement Partners attracts traffic only through Branded keywords
Source: SEMrush, data for the last 30 days ending 17th April, 2025

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Search ranking: Scope for Pave America brands to enhance website content to attract more users and drive conversions

ORGANIC SEARCH

DIRECTIONAL

Keyword	Search Volume	Pave America							Rose Paving	Sunland Asphalt		Let's Pave
		alpha paving INDUSTRIES	PAVE AMERICA	U.S. PAVEMENT	Brothers Paving & Concrete	TURNER ASPHALT	CINCINNATI ASPHALT	NATIONAL pavement partners	Rose PAVING LLC	ATLANTIC SOUTHERN PAVING AND SEALCOATING	SUNLAND ASPHALT	Georgia PAVING	Let's Pave
paving companies near me	18,100	>100	>100	>100	>100	>100	>100	>100	4	>100	>100	>100	>100
Paving	14,800	>100	>100	>100	58	>100	>100	>100	3	>100	>100	50	>100
asphalt paving	9,900	74	>100	>100	>100	36	>100	>100	5	>100	>100	>100	>100
driveway sealcoating	8,100	>100	>100	12	45	>100	>100	>100	60	>100	>100	>100	>100
asphalt contractors	6,600	71	>100	>100	>100	59	>100	>100	62	>100	>100	>100	>100
paving contractors near me	6,600	>100	>100	>100	>100	>100	>100	>100	5	>100	>100	>100	>100
asphalt contractors near me	5,400	>100	>100	>100	>100	>100	>100	>100	5	>100	>100	>100	>100
paving contractor	5,400	>100	>100	>100	7	>100	56	>100	2	>100	>100	36	>100
paving contractors	5,400	>100	6	>100	>100	28	>100	>100	12	>100	>100	26	>100
paving companies	3,600	>100	>100	>100	>100	>100	>100	>100	4	64	>100	21	>100
paving company	3,600	>100	>100	>100	>100	30	>100	>100	3	>100	>100	50	>100
ada parking requirements	2,900	>100	>100	>100	>100	23	>100	>100	44	>100	>100	>100	41
asphalt companies	2,900	>100	>100	>100	>100	39	>100	>100	5	>100	8	37	>100
sealcoating driveway	2,900	>100	>100	14	18	>100	>100	>100	75	>100	>100	>100	>100
asphalt contractor	2,400	>100	>100	>100	>100	96	>100	>100	6	>100	73	>100	>100
pavement contractors	1,900	>100	>100	>100	>100	48	>100	>100	6	>100	33	>100	>100
pavement company	1,600	>100	4	8	>100	84	>100	>100	2	>100	>100	>100	>100
seal coating driveway	1,600	>100	>100	22	33	>100	>100	>100	74	>100	>100	>100	>100
asphalt paving contractors	1,300	41	>100	>100	>100	13	>100	>100	7	>100	40	>100	>100
contractor paving	1,300	>100	>100	>100	18	77	61	>100	12	73	>100	85	>100
pothole repair	1,300	9	51	82	>100	>100	>100	>100	>100	>100	>100	>100	>100
seal coat driveway	1,300	>100	>100	19	32	>100	>100	>100	78	>100	>100	>100	>100
parking lot repair	1,000	>100	4	>100	>100	>100	>100	>100	63	>100	>100	>100	14
parking lot sealcoating	880	57	18	6	>100	>100	>100	>100	30	>100	>100	>100	>100
parking lot fix	590	>100	7	>100	>100	>100	>100	>100	18	>100	>100	>100	36
asphalt crack sealing	480	45	37	>100	19	>100	>100	>100	81	61	33	>100	>100
asphalt repair companies	480	78	80	>100	>100	91	>100	>100	34	>100	>100	>100	>100
concrete parking lot contractors near me	480	>100	63	>100	91	28	31	>100	2	>100	>100	>100	>100

Note: Avg. ranks over the last 30 days – therefore, same rank can be there for multiple brands | Source: SEMrush, last 30 days ending 17th April, 2025

Legend: Rank 80-100 | Rank 51-80 | Rank 21-50 | Rank 11-20 | Rank 4-10 | **Rank 1-3**

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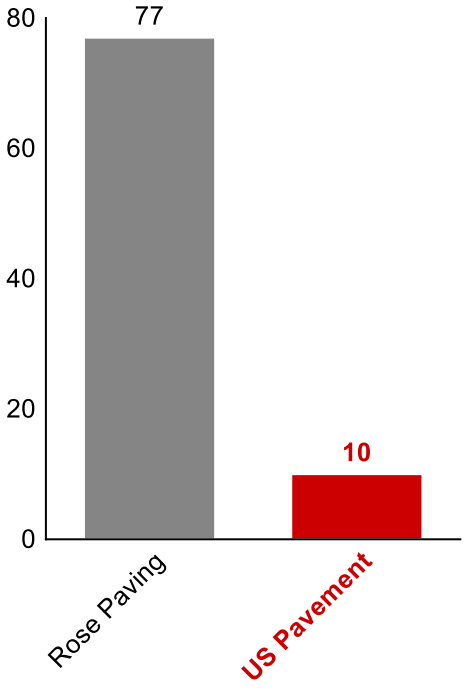
SEM: Rose Paving invests heavily in paid search advertising; Only US Pavement currently investing in paid search amongst Pave America brands

PAID SEARCH

DIRECTIONAL

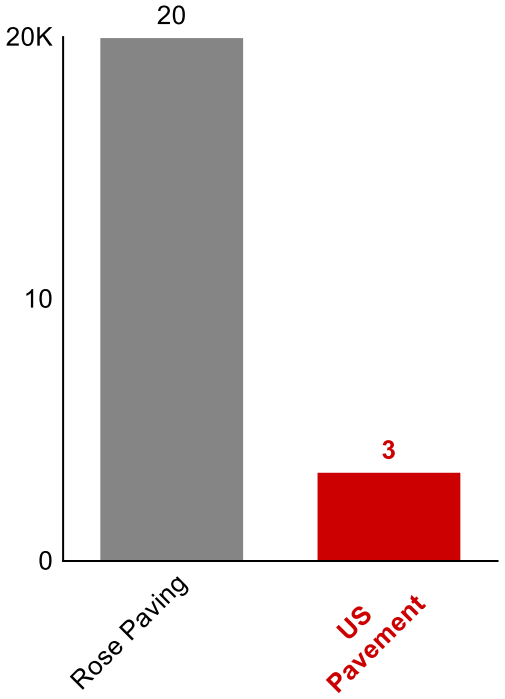
N of keywords

Number of keywords being bid on



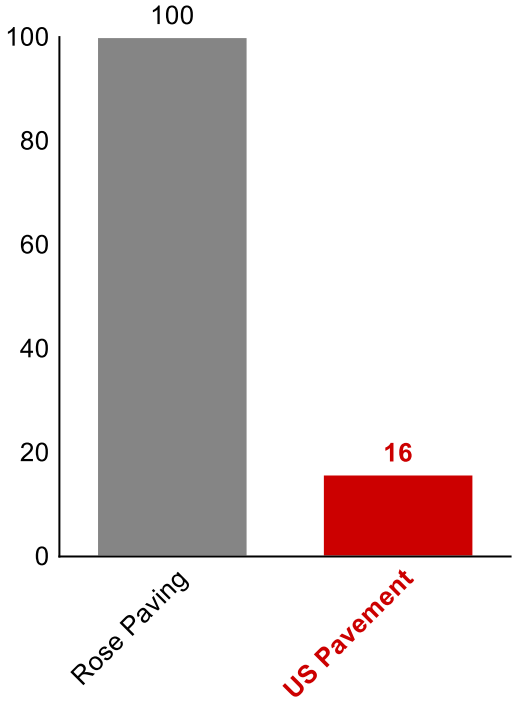
Spend $K

Paid Search Spend ($K)



Paid search traffic

Paid search traffic (indexed)



	Rose Paving	US Pavement
CTR (%)	2.4	**2.0**
CPC ($)	6.4	**6.8**

A **low CTR** indicates **ineffective keyword targeting**, suggesting that the chosen keywords are not highly relevant **to the search intent** of their **target audience**

Commentary

- **Rose Paving invests more on paid search vs. US Pavement** whereas rest of the peers do not invest in paid search traffic
  - Opportunity for Pave America brands to invest on paid search
- Both US Pavement and Rose Paving operate with a high **CPC** (~$6.5+) and low **CTR;** opportunity to optimize SEM strategy to lower CPC and improve CTR
- Opportunity for Pave America brands to start investing and **bid on high-volume unbranded keywords** to capture high intent target audience

Note: Paid search investment only done by Rose Paving and US Pavement in last 30 days
Source: SEMrush, for the last 30 days ending 17th April 2025

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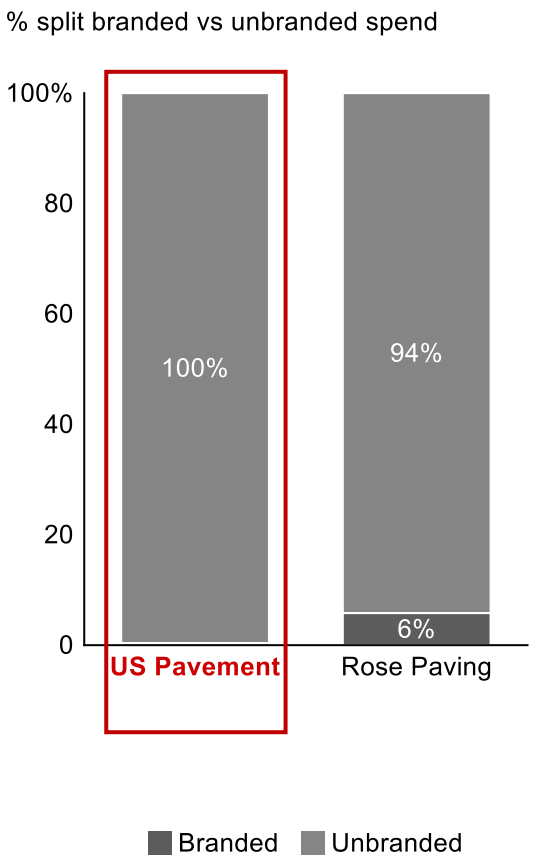
SEM: Scope for US pavement to invest in a well-optimized mix of keywords, keeping CPCs in check

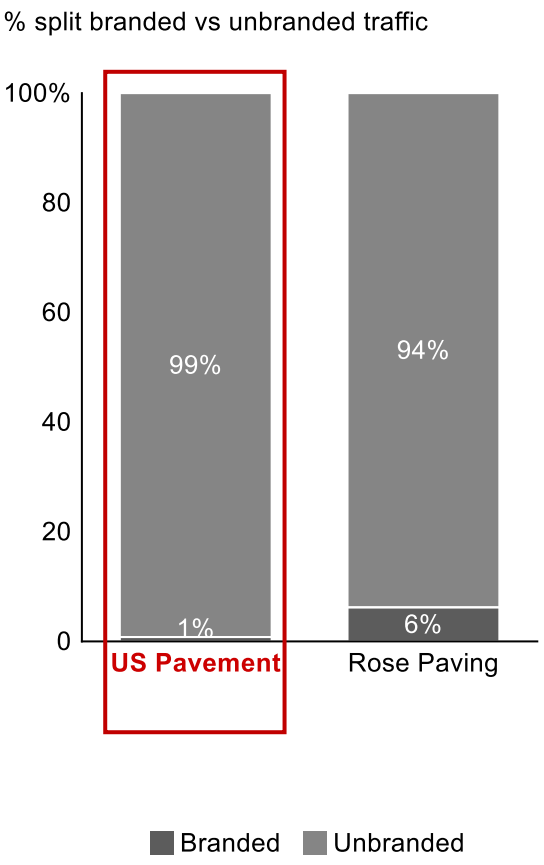
PAID SEARCH

DIRECTIONAL

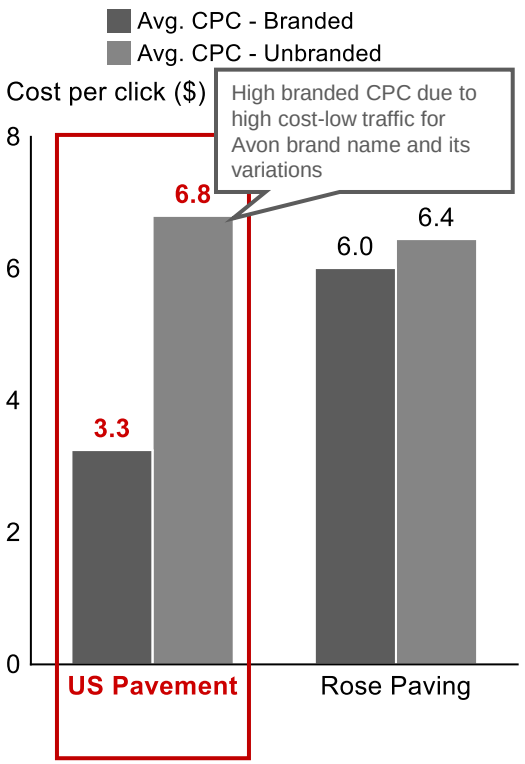
Branded v unbranded spend



Branded v unbranded traffic



Cost-per-click



	US Pavement	Rose Paving
Avg. position - Unbranded	**3.4**	2.5
Avg. position - Branded	**1.0**	1.0

Commentary

- **US Pavement spends only on unbranded terms** and generates ~99% traffic via unbranded, similar to Rose Paving
  - Investment in unbranded terms helps in increasing brand discoverability among potential consumers who are unaware of the brand and attract incremental traffic to website
- Opportunity for other brands to focus on investing in high search volume unbranded keywords that well help brands to create a stronger presence
  - Unbranded terms have higher search volume vs. branded, and have reasonable cost

Note: Paid search investment only done by Rose Paving and US Pavement in last 30 days
Source: SEMrush, for the last 30 days ending 17th April 2025

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Paid search: Opportunity for Pave America brands to bid on high-volume, low-cost keywords where they lack strong organic rankings

PAID SEARCH

DIRECTIONAL

Keyword	Search Volume	Pave America (U.S. PAVEMENT)	Rose Paving (Rose PAVING LLC)
concrete companies near me	*27,100*	-	4
paving companies near me	*18,100*	4	-
asphalt companies near me	*14,800*	-	1
concrete company near me	*12,100*	-	1
asphalt paving	*9,900*	-	2
concrete contractor near me	*9,900*	-	2
concrete suppliers near me	*8,100*	-	3
asphalt paving near me	*6,600*	-	4
parking lot striping	*6,600*	-	3
asphalt contractors near me	*5,400*	-	2
sealcoating	*5,400*	1	3
parking lot striping near me	*4,400*	-	2
paving companies	*4,400*	-	2
asphalt sealing near me	*1,900*	-	3
asphalt paving companies near me	*1,600*	-	4
parking lot painters	*1,300*	5	2
sealcoating companies near me	*1,300*	-	3
local concrete contractors	*480*	-	1
concrete staining companies	*390*	-	2
asphalt repair contractors near me	*320*	-	1
asphalt parking lot repair	*260*	-	1
road paving companies near me	*210*	-	1
parking lot asphalt	*170*	4	3

Note: No paid search investment for Starling in last 30 days
Source: SEMrush, for the last 30 days ending 17th April, 2025

Legend Rank 4-7 | **Rank 1-3**

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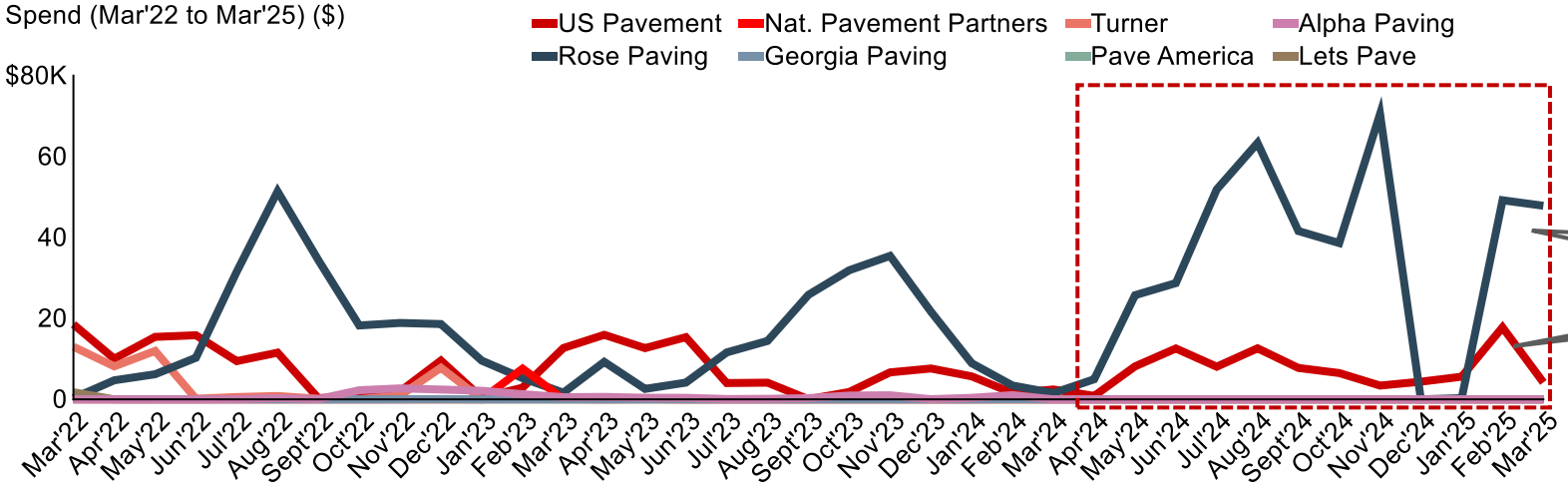
Paid search spend & CPC: Only US Pavement is actively spending on paid search over LTM; Opportunity for others Pave America brands to start investing

PAID SEARCH

DIRECTIONAL

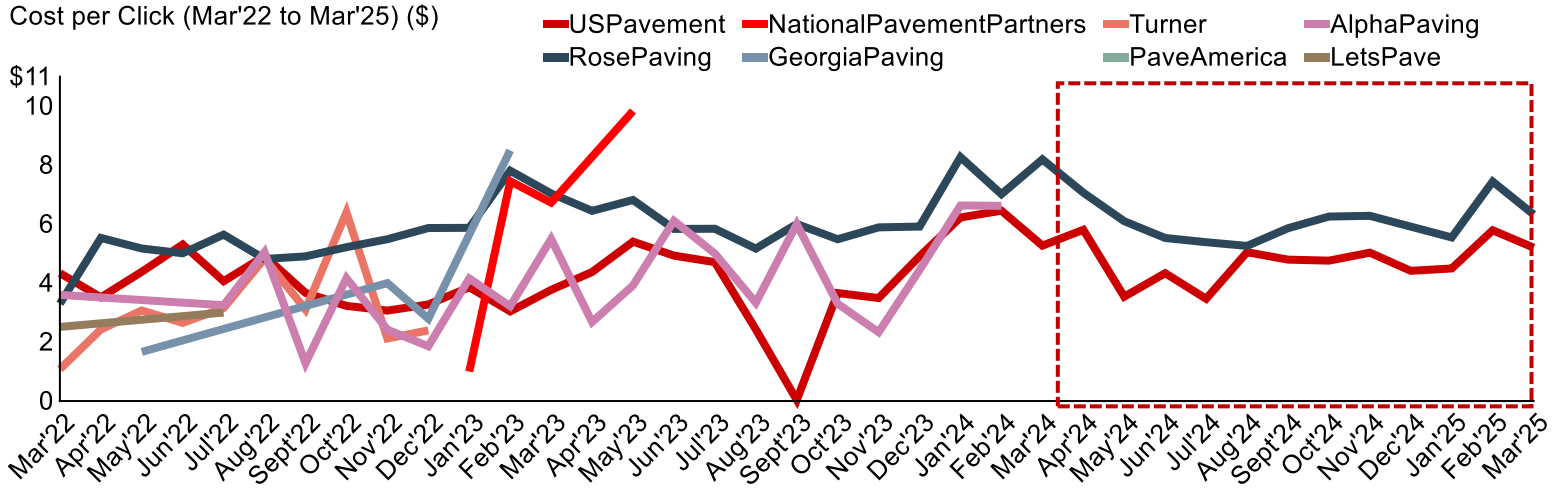
Spend (Mar'22 to Mar'25) ($)



Brands	Avg Monthly Spend (LTM, $K)	Change YoY
U.S. PAVEMENT	7.6	*18%*
Rose Paving LLC	35.2	*148%*

Only US Pavement and Rose Paving have invested in Paid Search over the LTM

Cost per Click (Mar'22 to Mar'25) ($)



Brands	Avg CPC LTM	Change YoY
U.S. PAVEMENT	4.6	*6%*
Rose Paving LLC	6.0	*1%*

Note: LTM refers to Apr'24-Mar'25
Source: SEMrush

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