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HARDWOOD UPDATE

THE TOP 250 DESIGN SURVEY

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THE TOP 250 DESIGN SURVEY 2020

The A&D community weighs in on the state of interior design and the commercial flooring business.

■ By Darius Helm

Studio BV's design of the Cystic Fibrosis Foundation in Minneapolis, Minnesota features J+J Flooring's Intrinsic carpet tile and Tatami LVT.

Despite daunting conditions in the market, architects and designers remain focused on providing solutions to end users, pivoting to develop innovative responses to the new range of concerns and priorities arising from the novel coronavirus crisis.

Needless to say, business has slowed. Billings are down. Budgets are down. This year, only 3% of respondents reported that budgets were up, compared to 23% last year, 37% in 2018, 38% in 2017 and 30% in 2016. Fully 50% of respondents say budgets are down; the remaining 47% say they're flat. And the future looks just as uncertain, as the pandemic, climate change, racial protests and election-year politics create a distraction from normalcy. Many businesses are holding back and waiting for signs of stability.

Although profound impacts on the design of commercial interiors are on the way, with everything in flux, it's too early to know how the landscape will change. The corporate sector, where hot-desking now takes on a new meaning, is still in the early stages of adapting to events. However, a recent survey by the National Bureau of Economic Research predicts that employers believe that 40% of those who switched to working remotely could effectively do so after the crisis ends.

Commercial flooring business has similarly declined in the last six months. It's reflected in the results of public flooring firms, with second quarter declines year over year ranging from 25% to over 40%. In that same quarter, the U.S. GDP decreased at an annual rate of 31.7%. All the commercial firms are facing the same conditions, though resilient flooring seems to be faring better than the other flooring categories.

The Architecture Billings Index (ABI), which is an economic indicator of commercial construction activity nine to 12 months

■ 25 YEARS

This year marks a quarter-century of Floor Focus Top 250 Design Surveys. Since the mid-1990s, Floor Focus has been reaching out to top design firms for insights into all aspects of the commercial market and its use of floorcoverings.

Over the years, some designers have opined on finding the time to respond to this comprehensive survey— in response, Floor Focus has shortened it over the years, including this year— yet the vast majority have thanked us for what we do. And, in turn, we thank the architect and design community for participating in these surveys year after year and helping the flooring industry to better understand the needs of designers and hopefully to better serve them.

out, was on the rise at the beginning of the year, with a score of 52.2 in January rising to 53.4 in February (above 50 indicates growth). In March, it plummeted to 33.3, then down to 29.5 in April, uncharted territory for the ABI. The previous record low was 34.3 in January 2009.

The numbers have improved somewhat since then, rising to 32 in May and 40 in both June and July, though they are still lower than anything in the last decade. But if the trend continues, the ABI could enter positive territory before the end of the year.

For 4th & Park at Pinecrest, a multifamily project in Orange Village, Ohio, Fairmount Properties specified a range of Mannington products, including LVT from the Spacia collection, pictured here in Dusky Walnut.

SECTOR OVERVIEW

Floor Focus asked designers about which sectors showed the most growth in the last 18 months. Like last year, the most active sector was medical/acute care, which includes hospitals, medical office buildings and clinics, with a 44% increase in votes from last year. Much of what has been driving this sector has been the development of smaller clinics, including standalone buildings the size of fast-food businesses, which have been popping up in strip malls across suburban America for the last few years.

The single biggest gains came from multifamily, following a dip last year. In fact, it's multifamily's strongest showing ever. The multifamily sector has been robust for over a decade, but even though it's been slowing for a few years, it is so much bigger today than it used to be that it generates a lot of activity even in a slow market.

The multifamily sector has also been a boon for flooring producers, since flooring in rentals is replaced fairly frequently, though the shift from carpet to hard surface (which lasts much longer) is cutting into those gains.

The tenant improvement sector grew while the owner-occupied corporate sector shrank. Science and tech projects, which often require specialized flooring, grew significantly last year, and higher education bounced back after a slump last year.

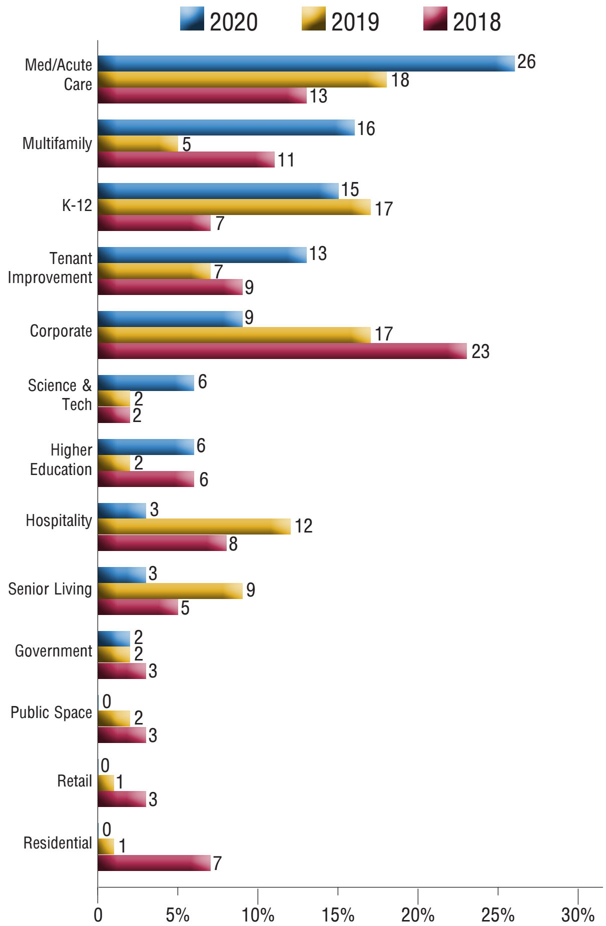
The sector that took the biggest dive last year was hospitality, with only a quarter of the votes of last year. Hospitality was poised to cool off, but the pandemic impacted the sector rapidly and extensively and has shown little signs of letting up.

The senior living sector was also down significantly. Coming off of several years of oversupply following the Great Recession, the sector was once again poised for some organic growth when the pandemic hit. And considering that the coronavirus is disproportionately impacting the elderly, COVID-19 could end up reducing the senior population enough to decrease occupancy rates and stunt the growth of the sector in the near term.

To get a better sense of the market, Floor Focus also asked designers to report on their three largest projects over the last year by market sector. For the last couple of years, the sector with the most large-scale projects has been healthcare, led by the acute care and medical office building side but also with robust senior living growth, followed by the corporate sector and then

■ WHAT MARKETS ARE GROWING FASTEST?

The biggest gains have been medical/acute care and, incredibly, multifamily, along with tenant improvement projects. Owner-occupied corporate, senior living and hospitality declined.



Also mentioned: Private country clubs

Lilliana Alvarado, lead designer with Uphealing, and architecture firm Nelson-Tremain Partnership designed The Memory Center in Johns Creek, Georgia, featuring Interface's Level Set LVT. Photo by Jon Showe, VantagePoint3D.

the education sector. But corporate projects over the last year soared back to the top, despite minimal growth from Fortune 500 jobs, rising to 36% of all top projects from 22% in 2019.

At the same time, a huge jump in large university projects offset declines in K-12, leaving the education category about flat. But the category that really suffered was healthcare. Senior living went from 11% of top projects in 2019 to just 3% this year, and medical/acute care went from 18% to 13%. Considering that medical/acute care was the top category in overall growth but declined in top projects, it sounds like the bulk of jobs were not large hospital complexes but rather smaller clinics and specialty practices.

Also, multifamily large projects made some gains last year, while retail projects fell.

■ TOP PROJECTS

After slumping last year, the corporate sector again rose to the top, while healthcare top projects declined, mostly due to fewer senior living jobs. Higher education jobs were also up.

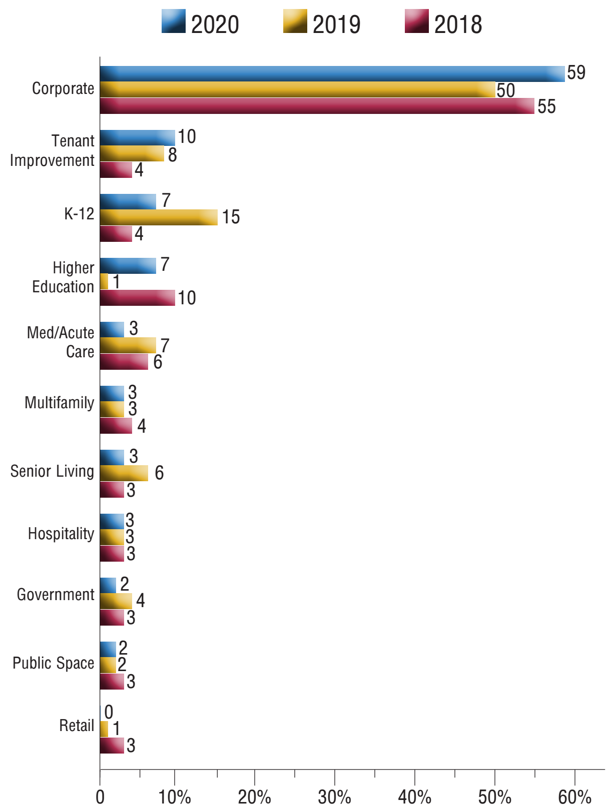
	2020	2019	2018
TOTAL CORPORATE	36%	22%	32%
Large & medium	(21%)	(14%)	(20%)
Fortune 500	(4%)	(3%)	(4%)
Small office	(11%)	(5%)	(8%)
TOTAL EDUCATION	19%	19%	13%
University	(10%)	(4%)	(5%)
K-12	(9%)	(15%)	(8%)
TOTAL HEALTHCARE	16%	29%	22%
Medical/acute care	(13%)	(18%)	(17%)
Senior living	(3%)	(11%)	(5%)
MULTIFAMILY	7%	5%	8%
GOVERNMENT	7%	6%	6%
HOSPITALITY	6%	7%	8%
INSTITUTIONAL/PUBLIC SPACE	5%	6%	6%
RESIDENTIAL	3%	2%	2%
RETAIL	1%	4%	3%

The dominant floorcovering in the commercial market over the last couple of decades has been carpet tile, which first gained traction in utilitarian applications but in recent years, through both elevated design to target higher-end applications and through lightweighting to hit lower price points, the product has become ubiquitous.

It's no surprise that carpet tile's strongest market is the corporate workspace, by far the biggest commercial sector. The tenant improvement side of the corporate sector was a little late in the game of converting from broadloom to carpet tile, in part because of price barriers, but in recent years it has been making gains. This year, it moved past K-12 to the second spot, well behind owner-occupied corporate. K-12's carpet tile usage tends to jump a lot from year to year, suggesting it's based on large projects, which are common in K-12 jobs.

■ WHAT IS YOUR TOP MARKET FOR CARPET TILE?

Corporate, both owner-occupied and tenant improvement, showed carpet tile gains last year, and higher education bounced back. Carpet tile traction was weakest in K-12, medical/acute care and senior living.



ON PRODUCT SPECIFICATION

Floor Focus asked designers to cite the single most important factor in deciding with whom to do business, and for the first time in the 25-year history of this survey, quality and style selection did not account for the two top factors. This time around, while quality is still the most important factor, second to that is confidence in the company, representing the top priority of over a fifth of all respondents, more than double the votes received last year.

On the face of it, it seems like a response to the instability and uncertainty dominating the headlines, but one would expect service, product performance and salespeople to rank higher, not lower, than last year. But it is probably more likely that votes are simply shifting from these specific manufacturer attributes to a more holistic characterization.

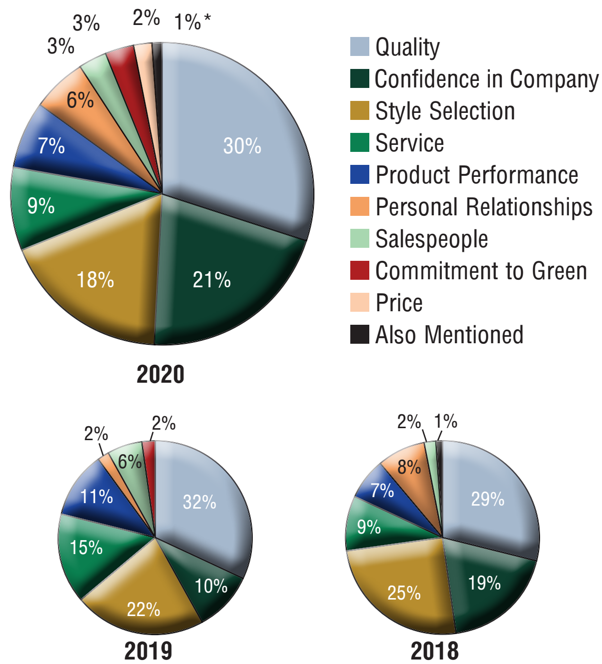
It's heartening but possibly transient that 3% of respondents cited commitment to green as their top priority, instead of the typical 1% or 0%. It's not that designers don't prioritize environmental sustainability. Rather, on the one hand, they can be limited by their clients, and, perhaps more to the point, sustainability is increasingly baked into the A&D process, from design to product specification.

When it comes to the biggest influences on product choice, manufacturer reps remain at the top, despite their inherent, bias toward their own products—much to the chagrin of contract dealers, who have broad product knowledge across a

Roots selected Terrain II LVT and a custom rug, both from Shaw Contract, for the design of its Chicago, Illinois clothing store.

DESIGNERS' PRIORITIES

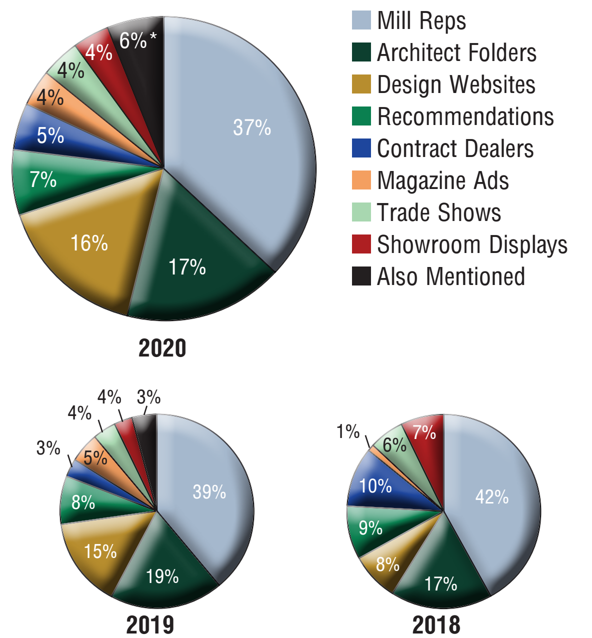
While quality and style selection tend to be designers' top priorities, this year confidence in the company received more than twice as many votes, even though, paradoxically, service and product performance both garnered fewer votes.



*Also mentioned: Functional requirements and code compliance, relationship with client

WHAT INFLUENCES PRODUCT CHOICE

For the 14th year in a row, mill reps topped this list. Contract dealers regained some influence and design websites also inched up.



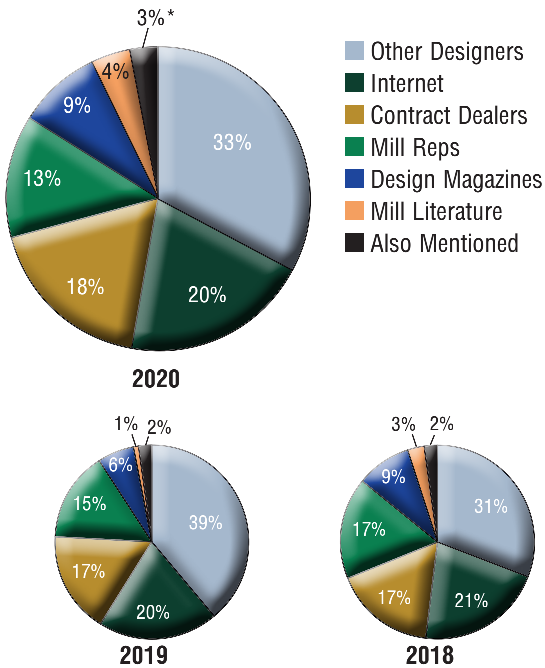
*Also mentioned: Manufacturer websites, social media (Instagram, if they have it), company library samples, Internet research and resources range of manufacturers and also understand issues surrounding installation and maintenance. But it's the reps that get all the facetime with design firms, though these days it's more online than face to face.

However, when the conversation turns to technical advice, there's a lot more balance. Since 2017, the majority of survey respondents have cited other designers as their top source for technical advice, with the Internet in the second spot and contract dealers close behind.

Mill reps used to rank higher—they topped the list in 2016—but in general designers recognize the value of the broader vision of colleagues and contract dealer relationships.

■ TECHNICAL ADVICE

For the third year in a row, the list ranking has remained the same, and it's the fourth consecutive year with other designers being the most important source for technical advice.



*Also mentioned: Distributors, own comparative research, "25 years of experience with all types"

The Specification Process Wish List throws some light on how designers approach specifying product, including their gripes. At the top of the list for the fourth consecutive year are pricing issues. However, it has nothing to do with product affordability. Instead, it's about clarity and pricing transparency. And it's about barriers erected by mills, contract dealers and other entities that make it difficult to do real price comparison.

These issues of transparency and standardization also relate to specification info and even product ingredients. Designers often feel that their relationships with reps are too adversarial,

■ SPECIFICATION PROCESS WISH LIST

PRICING ISSUES: Access to immediate info on pricing, rather than having to ask a rep/More accurate pricing/Less manipulation of prices/Published pricing not dependent on dealer relations/More transparency when it comes to price: we are the last to battle for the product when budgets are being scrutinized/More consistent pricing/Make it easier to see budget pricing/Have price guide for comparison "so that I select responsibly for my K-12 clients"/Better info on budget pricing; needs to be apples to apples/"Make budget pricing visible on all product info to help inform selections at the beginning of the project"

INSTALLATION CONCERNS: Better access to qualified installers/More details on basic installation info on any typical product/More no-excuse installers/Vendor-recommended installation/Better installation success with PVC-free flooring options and adhesive/Improve the process of installation drawings/More training for installers, especially for second- and third-tier projects/More control over the installation

TRANSPARENCY & STANDARDIZATION: Standardized spec info for easier comparison of a product type between different manufacturers/That all companies use exact same wording to ease comparison/The industry needs more transparency/Standardize description categories/"It's difficult to compare wearlayers and durability of various LVT products; everything is proprietary and there's not a good 'apples to apples' standard"

SAMPLING: Increase the ease of receiving samples; have not engaged certain companies due to difficulty in sampling/Need more complete specification info and resolution on websites to minimize sample orders/Quicker sampling/Be able to order smaller samples (have a choice in sample size)/"I cannot tell you how many times we get tile samples without a label … then the designer has to go back and see what samples were ordered and figure it out; waste of time"

COMMUNICATION AND KNOWLEDGE SHARING: A well informed architect is key to making a selection stay the course/More guidance and information when installing on atypical floor conditions/Better education on installation and care/"Reps shouldn't assume I know everything about their product"

UNSAVORY PRACTICES: Get reps and dealers to quit giving kickbacks to specifiers, contractors and end users for using their products/Get dealers who don't act like used car salesmen/Stop the substitution of specified product by dealers and installers/"Prevent direct influence of [reps] on clients, especially after the project is specified; there is a lot of work involved in design of the total environment; it costs the design firm time and money to entertain changes at that point"

MAINTENANCE CONCERNS: More emphasis to sales force about how to clean and care for the carpet/Provide durability and successful cleanability while retaining the original appearance

LEAD TIMES: More transparency on lead times/Need manufacturers to have more inventory or smaller batches replenished more often so as to not have such long lead times if something is out of stock and designers are forced into detective mode to figure out if the mill has what they need at a price within the budget.

One respondent pointed out that reps shouldn't assume designers know everything about their products, adding, "I always schedule calls with them and ask as many questions as possible to avoid issues, but I need them to also work to ensure they ask me questions and let me know their experiences as well."

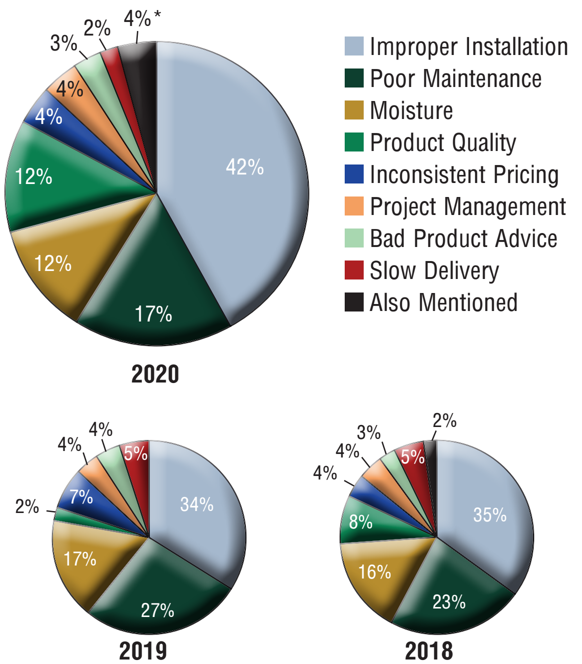
Installation continues to be a massive issue, largely because there's been such a dearth of experienced installers in the years following the recession. And the issue does not seem to be improving.

It's also worth noting that designers continue to be frustrated by what they see as unsavory practices, from kickbacks to going around the designer to the end user to switching out product. As one designer put it, "A specification is based on months of conversations with the client, and uninformed changes circumvent that."

When we asked designers about their top problems, not only did installation remain the biggest headache, but it was also the top issue for more respondents than at any time in the last five years, with 42% of designers voting it as the top problem.

TOP PROBLEMS

Improper installation garnered the most top problem votes in five years, while issues with maintenance declined to a five-year low. Moisture issues also declined. The biggest gains were in product quality issues.



*Also mentioned: Substitutions, dealers lying about price for products they can't get discounts on, dealers going behind back and switching out products, suppliers that price unfairly to get spec changed

This year, there were fewer votes for poor maintenance and moisture issues, though they still remain toward the top of the list. But this time around, product quality had six times as many votes as last year. At least in part, this could reflect the increased use of new types of resilient flooring, like rigid LVT, a product category the commercial market is not very familiar with, and one that comes in a wide range of qualities.

ON STYLE & COLOR

While there's no shortage of design and color in commercial floorcoverings—83% of respondents say they're getting what they want in color and style in carpet, and 75% say the same about hard surface flooring—many designers are still dissatisfied.

Their biggest gripe is color and what they perceive as an overly cautious approach to colorways. Generally, it's not so much that they dislike the available colors, but rather that they

WHAT'S IN NOW: COLORS

This year, greys continue to be heavily moderated by color tints and a strong drift toward warmer, more earth tone hues. In terms of warm and cool mentions, 70% were for warm. Blues and greens are much more on trend than fire colors— red was only mentioned a single time, for instance— with more than five times the mentions. Muted and dusty colors, along with soft pastels, seem to be trending. And blush, heavily mentioned last year amid 'Living Coral,' Pantone's color of the year, was only mentioned a single time this year, with a 'not' in front of it. And countering the strong trend toward lighter shades, including plenty of whites, were mentions of some browns and blacks and wood tones in general, though rustic hues and distressed finishes were cited less frequently than in recent years.

NEUTRALS: Warm greys/Warm neutrals/Taupe and architectural neutrals/Soft greys/Mix of warm and cool/Complex blends of neutrals/Neutrals with hints of colors/Greys with various undertones/Beige/Earth tones/Less yellowed neutrals/Ocher

BLUES & GREENS: Blue-greens/Teal/Aqua/Watery blue-green tones/Navy/Steel blues/Cobalt/Deep blue as a neutral

BLACKS & WHITES: Black (most mentions)/Crisp whites/Creams/Black/Near black/White-grey

PASTEL NOT PASTEL: Desaturated brights, but not pastels/Dusty pastel/More greyed brights versus jewel tones/Muted colors/Warm pink/Pops of greyed-out colors/Pastels

WOODY & BROWN: Raw umber/Rustic wood LVT finishes/Cool brown walnut/Browns/Neutral tones for woods/Rich wood tones/Fewer yellow-toned woods

FIRE COLORS: Orange/James Turrell cadmium yellow/Gold/Yellow

RUSTIC & INDUSTRIAL: Olive/Rust/Bronze

■ WHAT'S IN NOW: PATTERNS

Organic patterns are even stronger than last year, and include a wide and disparate grouping of patterns, from nature-inspired patterning to more literal florals and botanicals. Wood looks, which can be distinguished from organic patterns due to their derivation from hardwood flooring, also continue to be strong. Geometrics are trending, as well, often blending with organic patterns.

ORGANIC, NATURE-BASED, BIOPHILIC: Natural patterns/Organics/Medium-scale slightly organic/Nature inspired/Natural themes/Animal prints/Organic but with structure/Mimicking natural materials/Non-directional organic/Light, subtle natural textures/Florals, botanicals/Bold organic/Biophilic/Abstract organic

GEOMETRIC: Geometric patterns/Simple geometric/Tech, fractals/Softened geometrics/Faceted/Bauhaus geometrics/Moroccan/Herringbone/Aztec/Fragmented geometric shapes/Chevrons/Angles/Soft yet textured geometric

TEXTURES: Tone-on-tone textural constructions/Textures/Variable, random/Texturally rich/Subtle textures/Natural textures/Beautiful textures

LINEAR: Linearity/Linear graphic/"I still love stripes"

WOOD LOOKS: Wood grain/Wood tone/Woods/Mixed planks

■ WHAT'S IN NOW: LOOKS

Nature-inspired and biophilic looks have been trending in recent years and this year finally rose to the top as the dominant look trending in the commercial built environment. Clean and minimalist looks like updated mid-century modern are another strong trend, which, coupled with the pale, soft colorways, are creating havens from the chaos and volatility of the world at large. Interestingly, there seems to be a minor trend toward luxe, extravagance and "maximalism."

NATURE-BASED, BIOPHILIC: Honesty of materials/Organic/Nature-inspired textures/Natural wood textures/Mimicking natural stone, wood/Natural-looking finishes/Biophilia/Abstracted from nature/Organic, mottled, soft/Abstract organic/Natural materials/"A blend of organic patterns that will add depth and interest"

MODERN & CLEAN: Scandinavian/Simple, understated, purposeful/Minimalist/Mid-century modern/Clean/Contemporary, mid-century/Clean line geometries/Clean and light/Crisp, clean, bright/Modern and simple, not busy

RESIMERCIAL, ECLECTIC: Mix and match/Resimercial/Casual/Comfortable, homey/Retro/Eclectic/Shabby chic/Random patterns/Maximalism

TAILORED & SOPHISTICATED: Timeless/Modern, tailored/Hospitality looks/Architectural/Sophisticated/Refined industrial

want more color options—and in carpet this could be driven at least in part to the shift toward solution-dyed yarns. Also, they're clued in on what colors are trending, and they wish that the flooring industry would be more responsive and nimble when it comes to keeping up with those trends.

And in terms of patterns, designers tend to feel that manufacturers spend too much time copying each other and not

■ THE DESIGNERS' PRODUCT WISH LIST

It's hard to satisfy designers when it comes to color and pattern, so it's no surprise that these issues continue to top the wish list. Designers also feel that manufacturers are not sufficiently nimble when it comes to keeping up with trends. Also, designers feel that manufacturers spend too much time mimicking each other.

One designer, referring to carpet, said, "Some of the patterns and styles I'd like to use are not coming in colors that are up to date." Others spoke of a need for more sophisticated patterns. And, once again, there was frustration with the proliferation of wood looks, with too much homogeneity.

ON CARPET

COLOR LIMITATIONS: Lack of interesting color selections/Need more breadth in colors/Color variations are too trendy, less classic/Can never find taupes that are not too gold or creams or off-whites that are not too yellow/Still seeing a lot of midtone greys/Need a wider variety of accent colors (in the pattern, not in a solid) to pair with all of the neutrals/Doing K-12 always needs the spectrum and those in between in tint and hue

PATTERN SOPHISTICATION: Styles need to be exceptional, not lookalikes/Many patterns are garish and, frankly, unappealing/Some manufacturers are too conservative and there is very little to select from for 'design'/Contemporary patterns are limited/Not finding a lot of updated product lines

ON RESILIENT & HARD SURFACE

FAUX LOOKS IN GENERAL: More abstract or unique patterned looks that aren't wood or stone/Too many fake wood options and not many elegant options/More options for timeless wood looks; there are currently too many trendy products with distressed looks, big knots etc./"There is now a sea of wood and stone looks"

RUBBER: More organic patterns would be great; the speckled gym-type rubber flooring makes it difficult for the product to be versatile/Limited color and pattern compared to other materials

VINYL: Less distressed and dated wood tones/Warmer, more refined wood looks in looselay LVT, like pecan or clear cherry/The selections in economical products do not seen to have a wide variety of visuals/LVT was previously much more interesting … patterns and textures were more unique

CERAMIC: More variety of patterns needed/Not enough unique patterns and colors/Patterns and styles are not as sophisticated and without the "wow" factor

HARDWOOD: Too many grey undertones, and when manufacturers go warm, it's a red undertone, also not desirable enough time creating new and innovative products, particularly when it comes to carpet.

On the hard surface side, most of the comments relate to wood looks. Some feel that this emphasis on wood visuals comes at the expense of other potential looks, from natural visuals like stone to abstract designs. Others feel like the wood looks on the market are not sufficiently trendy and don't come in the right colors.

Despite their gripes, designers had plenty of praise for flooring manufacturers, offering accolades to most of the big players. Three firms that got more kudos than last year are Mannington, AtlasMasland and Milliken. Designers also signaled their enthusiasm for some specific products and product characteristics, like Forbo's Flotex, Armstrong's Diamond 10 finish, Mannington's rubber flooring, Tarkett's Powerbond and Gerflor's Mipolam, among others. And they also voiced their disapproval of dated VCT designs, boring wood looks and the lack of punch in linoleum designs.

■ KUDOS

COMPANIES

1. Shaw Contract
2. Interface
3. Mohawk Group
4. Tarkett
5. Mannington
6. AtlasMasland
7. Bentley
8. Milliken
9. Patcraft
10. EF Contract/J+J Flooring

Also mentioned: Armstrong, Forbo, Bloomsburg, Gerflor, Crossville, Durkan, Havwoods, Stark, Totally Carpet, Peykar

PRODUCTS

Armstrong's Diamond 10 technology
Forbo's Flotex and carpet
Mannington's rubber flooring
Patcraft's exceptional reps
Tarkett's Tandus Powerbond
Mannington's LVT
Gerflor's Mipolam
Interface's matching LVT and carpet tile heights
Lili Cement Tile
Alyse Edwards tile
AtlasMasland's Living series

DISAPPOINTMENTS

1. RESILIENT FLOORING: VCT overall/Tired and dated VCT designs/Boring non-wood LVTs/Woven vinyl ("Impossible to clean")/Linoleum still lacking in "wow"/Click vinyl tile/PVC-free options that perform/Rubber flooring/Options in resilient patterns for senior living market
2. CARPET TILE: Carpet tile patterns and styles "need something much more than just the linear 'corn-row' patterns/Interface, Mohawk and Shaw collections for "impactful yet unusable and me-too patterns
3. RUBBER FLOORING IN GENERAL

LVT and carpet tile remain the hottest flooring products in the commercial arena, with carpet tile nearing saturation and LVT still growing strongly, boosted somewhat by increased specification of rigid LVT. However, nearly 40% of those surveyed don't use rigid LVT, which is still limited in terms of commercial applications.

Area rugs have become a much more important element in commercial spaces, in part because of the resimercial look but also to counter the hard and loud environments generated from the increased use of hard surface flooring. Again, though, nearly 75% of surveyed designers don't use rugs—at least not yet.

■ HOT PRODUCTS

LVT and carpet tile continue to dominate the commercial floorscape. Area rugs, which have been gaining in recent years, were up significantly last year. Rigid LVT also showed gains, and both hardwood and rubber rebounded this year.

	2020	2019	2018	Don't Use
1. LVT	64%	61%	68%	9%
2. CARPET TILE	47%	53%	61%	1%
3. AREA RUGS	41%	33%	34%	27%
4. CERAMIC	38%	37%	46%	2%
5. RIGID LVT	26%	23%	--	38%
6. STONE	20%	5%	21%	17%
7. HARDWOOD	19%	15%	19%	32%
8. RUBBER	15%	12%	15%	14%
9. LINOLEUM	10%	11%	4%	31%
10. BROADLOOM	9%	7%	8%	22%
11. SHEET VINYL	9%	16%	11%	30%
12. VCT	6%	6%	3%	31%
13. BAMBOO	4%	1%	4%	73%
14. LAMINATE	3%	7%	13%	42%
15. 6' ROLLS	2%	5%	4%	48%
16. CORK	1%	4%	5%	64%
FIBERS				
1. NYLON	18%	16%	16%	12%
2. WOOL	13%	11%	14%	45%

Hardwood is also a hotter product this year—both Shaw and Mohawk now offer commercial hardwood lines—and there's also a steady increase in the number of designers who are using wood products. Designers would like nothing more than to use wood—they love authentic products and also feel strongly about hardwood's environmental profile—but issues of performance have inhibited its growth in the commercial market. However, today's hardwoods perform better without sacrificing the visual, and they're a good fit in today's floorscape, which mixes flooring types much more so than in the past.

And a big part of that floorscape these days is finished concrete, which first gained traction because of its performance characteristics, most notably in retail environments like home centers. But it was really the dotcom culture that brought concrete as a finished material to the attention of designers, who were drawn to it as an authentic architectural element. This year, about three quarters of surveyed designers report that they regularly use finished concrete in their projects, about the same percentage as the last few years. And on average it makes up about 15% of their finished floorspace.

■ FINISHED CONCRETE

The use of concrete as a finished floor has become much more prominent over the last decade in the commercial built environment, from utilitarian applications in the retail sector like home centers and large chains to more sophisticated, high-design applications in the corporate and education sectors.

This year's responses suggest that use of concrete remains fairly steady. For instance, 76% of respondents reported using finished concrete in their projects, compared to 79% last year and 72% in 2018. And among those 76%, it accounted for 15.5% of total flooring square footage this year, down from 17.2% in 2019 but up from 14.5% in 2018. And nearly 25% report not using concrete at all, up marginally from about 20% last year. Also, 11% of respondents report that concrete accounts for at least 50% of their flooring square footage, about the same as last year.

Overall, 36% of respondents say concrete use is increasing and 18% say it's decreasing, compared to 35% and 13%, respectively.

■ GREEN WISH LIST

1. **MORE TRANSPARENCY AND STANDARDIZATION:** Comparisons are always helpful/More options and more transparency; should just be the industry standard/Many environmental declarations to know and understand/Always good to have the latest and best info/"I feel like there is a lack of information being provided on green flooring products"

2. **NEED MORE PRODUCT:** Not enough, and the offerings have become dated/Want more to choose from/Would love to see more options from all manufacturers, with more visuals/Need more quality resilient flooring products/There need to be more and marketed more heavily to the design and specifier community

3. **NEED MORE PVC-FREE:** Need more durable, tested vinyl-alternative resilient flooring options/More options that do not include vinyl/"There are not enough options for PVC-free resilient flooring that are not linoleum or rubber. I see a few coming out but the looks are mostly wood look, which I don't really need"

4. **MAKE IT EASIER:** Should be easier to specify green products; should be the norm, not the option/Each manufacturer should have its own book with just the green product overview with pricing indicated/It could be better organized and easier to compare between manufacturers

ON SPECIFYING GREEN

The greening of commercial buildings has been largely driven by the A&D community, which continues to provide the vision, ever evolving, that informs everything from construction materials to interior finishes, flooring included. As such, the flooring industry is always working toward meeting the demands of the design firms, though not always at a pace that they require. This year, 72% of designers say they're satisfied in terms of green flooring products available on the market, compared to 73% last year, 78% in 2018 and 82% in 2017—suggesting the gap may be widening between what designers want and what flooring producers are offering.

Also, 67% of surveyed designers say they need better information on the environmental profile of flooring products, and this number has been trending up—from 55% last year, 52% in 2018 and 40% in 2017. It looks like designers aren't getting what they want from manufacturers in terms of clarity and transparency. The lack of meaningful standardization so that specifiers can easily compare the green profiles of products seems to be the biggest issue.

■ GREEN KUDOS

This year, the bulk of responses were again for Interface, though Shaw and Mohawk were also prominent, and Forbo received multiple mentions. Shaw's In Tandem was cited, as well as its PVC-free products and Caress nylon. Interface's Studio Set and zero carbon product line received kudos, as did Mohawk's Living Product Challenge products.

Also mentioned were Forbo's Marmoleum Striato, EF Contract's Kinetex, RSRV from Novalis' Ava, Schönox's AP Rapid Self-Leveling Compound, Porcelanosa's Krion, Mats Inc.'s Purline, Patcraft's carpet tile with minimal fiber and Armstrong's PVC-free version of Medintech

■ GREEN LEADERS

Interface and Shaw strengthened their hold on the top two spots, accounting for 62% of the votes, and Forbo climbed up to third from the bottom of the list.

	2020	2019	2018
1. INTERFACE	44%	35%	35%
2. SHAW	18%	15%	23%
3. FORBO	8%	3%	4%
4. MOHAWK	7%	13%	6%
5. TARKETT	6%	11%	5%
6. MILLIKEN	5%	8%	2%
7. J+J/EF CONTRACT	3%	0%	2%
8. ARMSTRONG	3%	3%	5%
9. UPOFLOOR/KÄHRS	2%	4%	1%
10. BENTLEY	2%	0%	1%

Also mentioned: Schönox, Crossville

THE WINNER

This year, Aquafil has again awarded one survey participant a $500 cash prize. This year's winner, chosen at random, is:

- Julie Gauthier
  Perkins + Will

AQUAFIL USA
Synthetic fibres and polymers

Designers praised several firms for their green products and overall sustainability progress, with Interface as always garnering most of the accolades, followed by Shaw and Mohawk. And in terms of products and chemistries, there continues to be plenty of focus on PVC-free products. Most of the major flooring manufacturers either offer PVC-free resilient flooring or are working on them right now.

BEST OVERALL BUSINESS EXPERIENCE

This year, Floor Focus has adjusted this list from simply hard and soft surface to cover the three dominant commercial floorcovering categories— carpet, ceramic tile and resilient flooring.

CARPET	CERAMIC FLOORING	RESILIENT FLOORING
1. SHAW CONTRACT	1. DAL-TILE	1. TARKETT
2. INTERFACE	2. CROSSVILLE	2. SHAW CONTRACT
3. MOHAWK GROUP	3. PORCELANOSA	3. ARMSTRONG
4. BENTLEY MILLS	4. SHAW CONTRACT	4. MOHAWK GROUP
5. TARKETT	5. CONCEPT SURFACES	5. INTERFACE/NORA
6. MILLIKEN	6. CERAMIC TECHNICS	6. MANNINGTON
7. PATCRAFT	7. CREATIVE MATERIALS	7. PATCRAFT
8. ATLASMASLAND	8. STONEPEAK	8. FORBO
9. J+J/EF CONTRACT	NEMO	9. GERFLOR
10. ENCORE HOSPITALITY	10. EMSER	10. ALTRO

■ FAVORITE CARPET MANUFACTURERS

After a hiatus last year, where Tarkett won in Performance, Shaw has swept all five categories for the fourth time in five years. Interface was second in all but Value, where Mohawk took the second spot.

SERVICE

Shaw comfortably won this category, and Interface took the second spot back from Tarkett, with Mohawk close behind.

1. SHAW CONTRACT
2. INTERFACE
3. MOHAWK GROUP
4. BENTLEY MILLS
5. MILLIKEN
6. PATCRAFT
7. TARKETT
8. MANNINGTON
9. ATLASMASLAND
10. ENCORE HOSPITALITY

QUALITY

While Shaw took the top spot in Quality, Interface was a strong second, and Bentley was close behind, the same as last year.

1. SHAW CONTRACT
2. INTERFACE
3. BENTLEY MILLS
4. MOHAWK GROUP
5. TARKETT
6. ATLASMASLAND
7. MILLIKEN
8. MANNINGTON

DESIGN

This year, Interface took back the second spot, with Bentley close behind in third. And Mohawk and AtlasMasland made gains.

1. SHAW CONTRACT
2. INTERFACE
3. BENTLEY MILLS
4. MOHAWK GROUP
5. MILLIKEN
6. ATLASMASLAND
7. PATCRAFT
8. J+J FLOORING
9. TARKETT
10. MANNINGTON

PERFORMANCE

Shaw and Tarkett switched spots this year, while Interface held onto second, and Bentley and Milliken made some gains.

1. SHAW CONTRACT
2. INTERFACE
3. TARKETT
4. MOHAWK GROUP
5. BENTLEY MILLS
6. MILLIKEN
7. MANNINGTON
8. ATLASMASLAND
9. PATCRAFT
10. J+J FLOORING

VALUE

Shaw was strongest in Value, taking the top spot for the 11th consecutive year. Mohawk, Patcraft and Mannington moved up.

1. SHAW CONTRACT
2. MOHAWK GROUP
3. PATCRAFT
4. INTERFACE
5. TARKETT
6. MANNINGTON
7. BENTLEY MILLS
8. J+J FLOORING
9. MILLIKEN
10. ATLASMASLAND

■ FAVORITE RESILIENT & HARD SURFACE MANUFACTURERS

This year, Dal-Tile, Tarkett and Shaw took the first and second spots in all categories. While Shaw Contract is mostly focused on resilient, and Dal-Tile is all about ceramic, Tarkett offers vinyl, rubber and linoleum.

SERVICE

Tarkett moved up a spot to win this category comfortably ahead of the field, though Dal-Tile and Shaw Contract were competitive.

1. TARKETT
2. DAL-TILE
3. SHAW CONTRACT
4. CROSSVILLE
5. INTERFACE/NORA
6. ARMSTRONG
7. MANNINGTON
8. MOHAWK GROUP
9. ALTRO
10. FORBO

Also mentioned: Bentley, Emser, Gerflor, Ceramic Technics, Havwoods, Karndean, Ecore, EF Contract, Iris, Tilebar

QUALITY

Shaw moved up from third to take the top spot this year, while Dal-Tile and Tarkett were neck and neck for second and third.

1. SHAW CONTRACT
2. DAL-TILE
3. TARKETT
4. INTERFACE/NORA
5. ARMSTRONG
6. MANNINGTON
7. MOHAWK GROUP
8. CROSSVILLE
9. PATCRAFT
10. ECORE

Also mentioned: Forbo, Gerflor, Havwoods, Karndean, Parterre, Ceramic Technics, Ergon

DESIGN

Shaw Contract moved up a spot to take first in Design this year. Dal-Tile made gains, and Tilebar made the list for the first time.

1. SHAW CONTRACT
2. TARKETT
3. MANNINGTON
4. DAL-TILE
5. MOHAWK GROUP
6. TILEBAR
7. CROSSVILLE
8. INTERFACE
9. FORBO
10. WALKER ZANGER

Also mentioned: Armstrong, Bentley Mills, Ceramic Technics, Havwoods, J+J Flooring, Karndean, Patcraft. 41zero42, AtlasMasland, Dinesen, Lili Cement Tile

PERFORMANCE

Tarkett moved up a spot to win in Performance, the tightest category, while Shaw Contract and Armstrong made gains.

1. TARKETT
2. DAL-TILE
3. SHAW CONTRACT
4. ARMSTRONG
5. INTERFACE/NORA
6. MOHAWK GROUP
7. MANNINGTON
8. CROSSVILLE
9. PATCRAFT
10. GERFLOR

Also mentioned: Ecore, J+J Flooring, Ceramic Technics, Havwoods, Karndean, 41zero42, AtlasMasland, Altro

VALUE

Dal-Tile moved up a spot to win in Value, barely ahead of Tarkett. And Patcraft and Armstrong both made solid gains.

1. DAL-TILE
2. TARKETT
3. PATCRAFT
4. SHAW CONTRACT
5. ARMSTRONG
6. MANNINGTON
7. MOHAWK GROUP
8. INTERFACE/NORA
9. ATLASMASLAND
10. CONCEPT SURFACES

Also mentioned: Ceramic Technics, Crossville, Karndean, Beauflor, Tilebar, Chilewich, Havwoods, Ergon