FLOOR FOCUS

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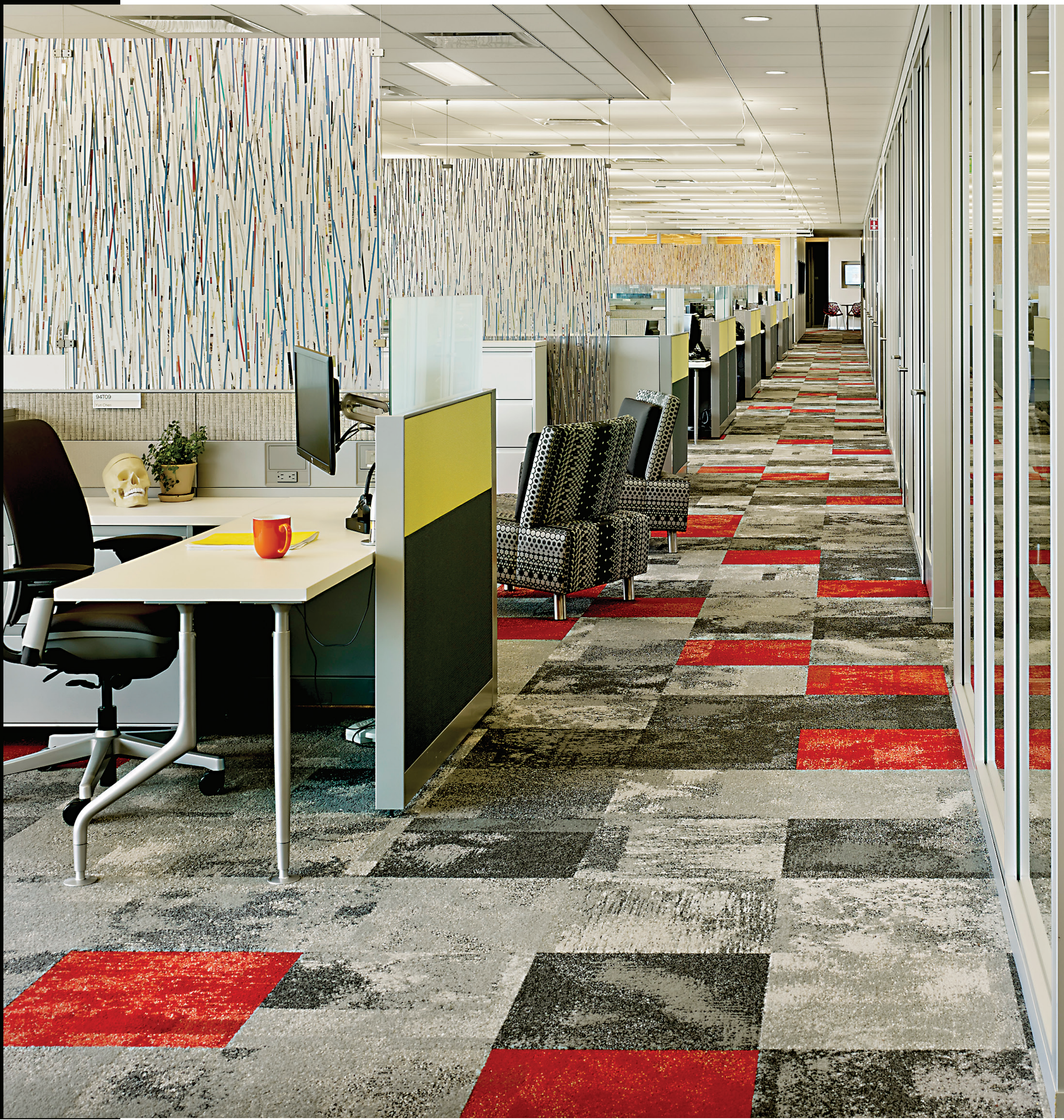
HARDWOOD UPDATE

THE TOP 250 DESIGN SURVEY

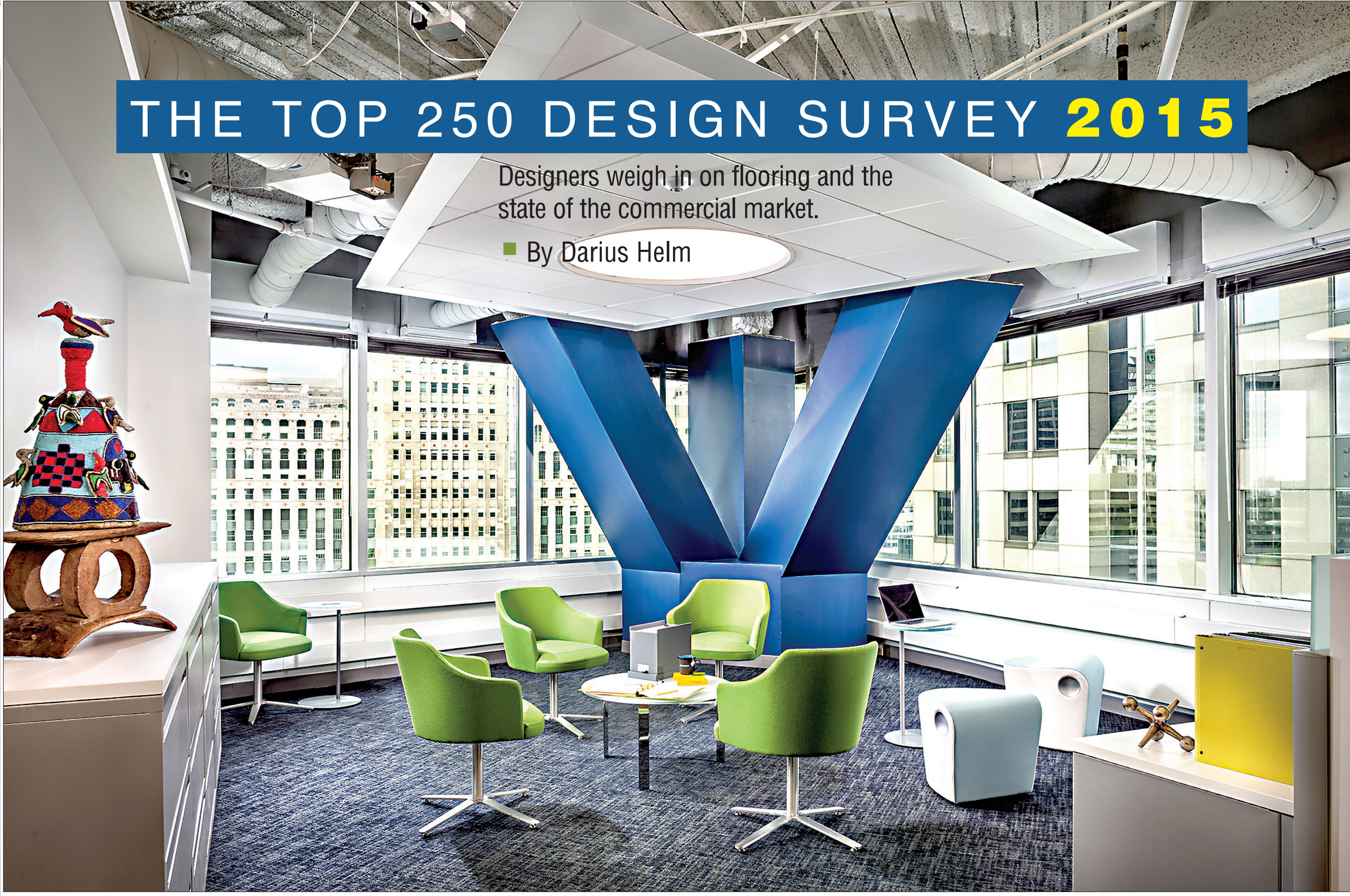
HEALTHCARE—ACUTE CARE



THE TOP 250 DESIGN SURVEY 2015

Designers weigh in on flooring and the state of the commercial market.

■ By Darius Helm



For its Fragomen Worldwide project in Chicago, Illinois, Wight & Company chose Layer, a broadloom by Shaw Contract, which designers voted the top carpet mill in Overall Business Experience. Photo by Paul Schlismann.

In this year's Top 250 Design Survey, the A&D community reports that the most significant developments are not in sector activity or budgets or client demands but instead are largely within commercial flooring itself, from the shortage of qualified installers to the surge of LVT in the market and the one-stop-shop phenomenon.

Designers are dazzled by their options, at least for now. In the last few years, as LVT has taken the market by storm, there have been two major, and related, developments. One is the investment in domestic LVT production by Mannington, Shaw, IVC (Mohawk), Armstrong, Tarkett and FloorFolio. The other is how the major carpet mills have fully embraced LVT, diving into the deep end, flooding the market with their products, and creating both huge opportunities and widespread confusion.

Shaw, Mohawk, Mannington, Milliken, Tandus Centiva, Bolyu—several of the leading carpet mills are now bundling LVT either with their own manufacturing or through extensive sourcing programs. And they've been heavily marketing their programs, which often include coordinated hard and soft surface lines, to A&D firms, apparently with good success. The ability of these mills to offer a wide range of flooring categories can simplify the specification process. A design firm that has enjoyed success working with Shaw carpet, for instance, generally won't think twice about getting its resilient flooring from Shaw as well.

All these carpet mills suddenly offering resilient and hard surface flooring seems to have engendered a wide scale perception among designers that all mills now offer all types of flooring, to the extent that a noticeable percentage of the votes for favorite hard surface manufacturers were cast for carpet mills that only sell carpet. And a few carpet votes were cast for resilient specialists, like Armstrong, that don't offer any carpet.

Clearly, all of this is going to have a big impact on the fortunes of flooring producers. For one thing, it means that the big players are likely going to increase their share of the total flooring market, diminishing the fortunes of many niche producers and specialists of both hard and soft surface flooring. And in the long run, this could mean an increased homogeneity in offerings—already a major complaint among A&D firms.

The other critical issue in flooring is installation. The recession decimated the ranks of installers on both the residential and commercial sides of the industry. Those who could manage it gravitated toward other trades, many of which pay better and aren't as hard on the body. So when the market stabilized and demand for installers started to rebound, there was a dearth of qualified tradesmen. And since then the problem has only grown worse.

So now that there's more commercial activity, more floors are going down—and so is the quality. Demand is growing for certified installers, who are few and far between, and there's no clear indication of the strategy for bridging that gap. And at the same time, there's more pressure than ever to get projects completed in shorter cycles (with smaller budgets), creating an ideal climate for a colossal wave of installation failures.

SECTOR OVERVIEW

Designers were asked about their top three projects over the last year, and which sectors they were in. And for the second year in a row, the dominant commercial sector, corporate, has continued to chug along, making incremental gains, but there's been more growth in the education sector, in parts of healthcare and in the hospitality sector. The most active sector for large projects for the second year in a row is education, where private dollars have been funding higher education projects, and public money in pockets around the country has been driving the completion of K-12 jobs.

In the corporate sector, significant small office jobs are down this year, Fortune 500 projects are flat, and the real growth has been in the large and medium jobs—those jobs run the gamut from car dealerships to insurance companies and technology firms.

In healthcare over the last year, large projects for clinics, medical office buildings and hospitals are up, but large projects in the senior living sector have been sluggish. In fact, that part of senior living has yet to recover from the hit taken by pending retirees in the Great Recession.

Prior to 2008, there was no shortage of news about continuing care retirement communities, and how they were transforming the senior living landscape. Seven years later, it's still a sector in the midst of transformation, but the pace has slowed, the scale has been reduced, and the ambitions don't seem as lofty and dramatic. The fact is, while the top 1% continue to build on their wealth, fortunes have declined for the rest of America. Baby Boomers are postponing retirement, and many are simply working until they're no longer employable—just like people did 100 years ago, before pensions and other support systems for the elderly were a common part of American society. So it makes sense that, even as the senior living market grows, large projects are less common.

Nevertheless, the sheer size of the senior living market, and the fact that it is registering solid incremental growth, has presented a lot of opportunities for the design community. Senior living offers a wide variety of environments that relate to sectors ranging from hospitality and residential to retail, public space, acute care and even corporate. And that also means a wide variety of flooring solutions.

Hospitality has been growing for the last couple of years, and it's poised for more growth in 2016. Large hospitality projects were up over 40% among surveyed designers, compared to last year. That sector is also poised for transformation, though on a more modest scale. Hard surface flooring and carpet tile are now legitimately competing against broadloom for share of square footage in both guest rooms and public space.

The other sector showing significant growth in large projects, up nearly 30% from last year, is residential. And that includes both high-end private residences and multi-family—and most of that multi-family is at the higher end of the market. That growth reflects both the accelerated growth at the upper end and the cultural shift toward urban living and away from home ownership by the Millennial generation.

■ TOP PROJECTS

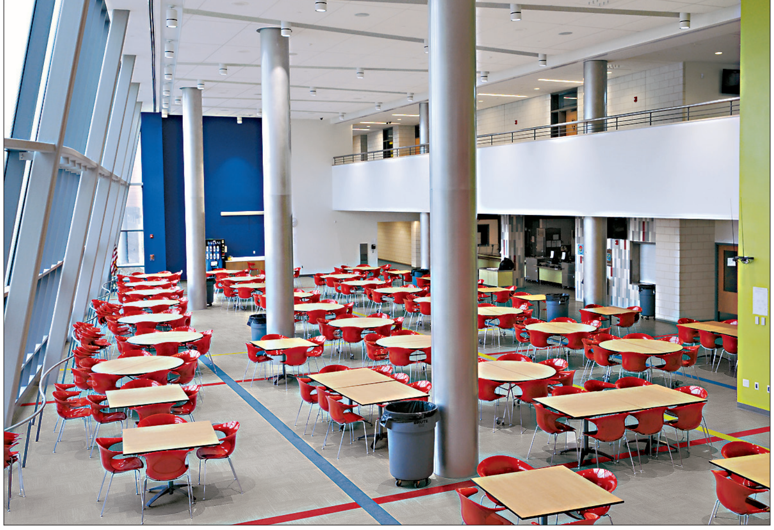
For the second year in a row, the education sector was most active in large projects among surveyed designers. Senior living was down while acute care was up. The residential sector also showed growth, though the fastest growth was in the hospitality sector.

	2015	2014	2013
University	14%	14%	12%
K-12	12%	12%	13%
TOTAL EDUCATION	26%	26%	25%
Large & medium	15%	13%	15%
Fortune 500	4%	4%	6%
Small office	6%	8%	7%
TOTAL CORPORATE	25%	25%	28%
Medical/acute care	13%	11%	13%
Senior living	4%	7%	6%
TOTAL HEALTHCARE	17%	18%	19%
HOSPITALITY	10%	7%	6%
RESIDENTIAL	9%	7%	4%
GOVERNMENT	6%	5%	7%
INSTITUTIONAL/PUBLIC SPACE	4%	8%	5%
RETAIL	3%	4%	6%

■ WHAT NEW MARKETS ARE YOU GOING INTO?

Senior living is down in top projects but up substantially in overall activity. Also up are higher education, hospitality and residential, while medical projects are down.

	2015	2014	2013
1. CORPORATE	15%	18%	21%
2. SENIOR LIVING	14%	10%	3%
3. HIGHER EDUCATION	13%	12%	11%
4. MED/ACUTE CARE	11%	14%	22%
5. K-12	9%	9%	10%
6. RESIDENTIAL	9%	6%	4%
7. HOSPITALITY	8%	7%	5%
8. MULTI-FAMILY	7%	7%	4%
9. TENANT IMPROVEMENT	6%	9%	6%
10. RETAIL	4%	3%	4%
11. PUBLIC SPACE	2%	3%	4%
12. GOVERNMENT	2%	2%	4%



In its design of Connecticut's Waterbury Career Academy, SLAM Collaborative chose Armstrong's Natural Creations Mystix LVT for the cafeteria and dining area.

Significant public space projects were down from last year but about flat with 2013. And the retail sector, which showed some sporadic activity over the last few years but has generally been weak since 2004, lost a little more steam over the last 12 months.

In order to better understand sector activity and where it's headed, Floor Focus also asks designers which sectors posted the biggest increases in activity over the last 18 months and examines the results alongside the top projects results. While corporate activity leads the list, it's down 17% from last year. Meanwhile, senior living is up 40%, a good sign for that sector, though the data suggests that larger projects are not as prevalent. Higher education activity is up marginally, while K-12 is flat. And the acute care and medical office building sector is down over 20%, though it looks as though there are still plenty of large projects being completed.

Higher end residential business is up 50%, while multi-family is about flat. And tenant improvement work is down over 30%.

Floor Focus also asked designers about whether budgets in the last year were up or down. This year, 34% reported that budgets are up, while only 17% said they are down, and about half (49%) said they're unchanged. So it sounds like conditions may be improving to some degree.

Carpet tile, which accounts for well over half of all commercial carpet, has its biggest share of the floor in the corporate market, but it's still making significant gains in all the other sectors. In recent years, carpet tile has grown in both K-12 and higher education. This year, higher education is a top carpet tile market for 14% of respondents, up over 25% from last year. And it's also making big gains in acute care and medical office buildings, where it both warms up and quiets the spaces outside of clinical settings.

This year, fewer designers report senior living as a top carpet tile market. Senior living is one of the few sectors where broadloom still dominates. Broadloom remains important both in senior living residences and in a range of senior living public space settings, where hospitality looks are in demand.

However, hospitality looks are changing. In the last couple of years, carpet tile has finally started making long-promised inroads into that market, starting at boutique establishments and steadily moving into mainstreet hotel brands. Compared to 2014, 75% more designers in this year's survey cited hospitality as a top carpet tile market (and over three times more than in the 2013 survey), so clearly it's no longer all talk—carpet tile has found traction in that market.

■ WHAT IS YOUR TOP MARKET FOR CARPET TILE?

Corporate is the perennial top market for carpet tile, but it's gaining traction faster in smaller markets like higher education, medical and, most recently, hospitality.

	2015	2014	2013
1. CORPORATE	36%	39%	43%
2. HIGHER EDUCATION	14%	11%	13%
3. K-12	12%	12%	8%
4. MED/ACUTE CARE	8%	5%	12%
5. HOSPITALITY	7%	4%	2%
6. PUBLIC SPACE	5%	6%	1%
7. TENANT IMPROVEMENT	5%	7%	6%
8. GOVERNMENT	5%	6%	6%
9. MULTI-FAMILY	3%	1%	2%
10. RETAIL	2%	2%	1%
11. SENIOR LIVING	2%	6%	1%

Also mentioned: Exercise spaces, residential

ON PRODUCT SELECTION

For the third year in a row, designers cited style selection as the most important factor in deciding which manufacturers they will do business with, but this year quality was just as important. Historically, quality as the top factor indicates a weaker market while style selection dominates when the market is strong, so it makes sense that a middling market would show a balance between the two.

Interestingly, 25% fewer designers cited performance as the most important factor. While this might reflect a general performance improvement in flooring materials, it's more likely that it signals a shift in focus for designers toward overall quality.

■ DESIGNERS' PRIORITIES

Style selection has topped the list for three years running, with the exact same percentage, while performance has fallen as a priority. And for the second year in a row, not one designer cited environmental considerations as the single most important factor in deciding which manufacturers to favor.

	2015	2014	2013
1. STYLE SELECTION	27%	27%	27%
2. QUALITY	27%	23%	22%
3. SERVICE	13%	12%	16%
4. CONFIDENCE IN COMPANY	12%	14%	9%
5. PERFORMANCE	9%	12%	12%
6. PERSONAL RELATIONSHIPS	5%	7%	3%
7. PRICE	4%	3%	6%
8. SALESPEOPLE	3%	2%	4%
9. COMMITMENT TO GREEN	0%	0%	1%

For the second year in a row, not one designer named commitment to green as the top factor in determining with whom they will work. On the face of it, that might seem disheartening, as though environmental considerations don't really rate, but in fact that result is more of an illustration of how well integrated green issues have become in the specification process.

A green floor's success is not just about how green it really is. It's also about how good a floor it is. Hardwood, for instance, can be a fairly green product, but it cannot perform in most commercial applications. These days, a viable green product is one that performs at least as well as the traditional flooring, doesn't necessarily cost a penny more, and has no limits in terms of design and color.

■ WHAT INFLUENCES PRODUCT CHOICE

Mill reps remain on top of the list, though with fewer votes than in recent years. Recommendations from colleagues and associates are also down, while more respondents are relying on design websites.

	2015	2014	2013
1. MILL REPS	36%	37%	45%
2. ARCHITECT FOLDERS	23%	28%	26%
3. DESIGN WEBSITES	14%	9%	12%
4. RECOMMENDATIONS	6%	10%	4%
5. CONTRACT DEALERS	6%	8%	4%
6. SHOWROOM DISPLAYS	2%	4%	2%
7. MAGAZINE ADS	7%	2%	2%
8. TRADE SHOWS	1%	2%	0%

Also mentioned: Client standards, samples, experience with product, lunch and learn presentations

Mill reps remain the top influencers of product choice, but that doesn't mean that designers are happy about it, and the numbers have been trending down for the last couple of years. Architect folders are also down this year, as are recommendations from colleagues and contract dealers.

On the other hand, over 50% more designers cited design websites as a top influence on product choice, which is a less collaborative approach than designers reported last year, when it was all about relationships.

Last year, when it came to technical advice, designers cited other designers as their top sources. But that's gone this year as well, with 29% fewer designers making that claim. Instead, for the first time in the history of this survey, contract dealers were the top choice for designers when it came to sources of technical advice.

This result is welcome news to contract dealers, who for years have bemoaned the lack of appreciation for their expertise. Contract dealers consider themselves uniquely qualified in their knowledge of product and process, and they make a compelling case. Certainly, they are unparalleled in their understanding of what goes into a successful installation, and they're generally well informed about all aspects of the product, from its composition to its maintenance profile, and they're increasingly involved in reclamation as well. But designers also have a lot of gripes with contract dealers, which has been a barrier to building stronger relationships. (See the Specification Process Wish List on next page.)

■ TECHNICAL ADVICE

Contract dealers topped this list for the first time ever, suggesting that designers are finally realizing the value of both their expertise and their relative objectivity.

	2015	2014	2013
1. CONTRACT DEALERS	25%	19%	21%
2. INTERNET	23%	21%	25%
3. OTHER DESIGNERS	20%	28%	24%
4. MILL REPS	16%	17%	11%
5. MILL LITERATURE	10%	5%	4%
6. MAGAZINES	5%	8%	8%
7. FIBER PRODUCERS	1%	0%	2%

Also mentioned: Third party certifications

ON SPECIFYING PRODUCT

Designers were asked what changes they'd like to see in the specified floorcovering process, and this year one of the most divisive conflicts rose to the top of the list—switching the specification. For designers, contract dealers switching out the products designers have specified is one of the most infuriating problems with the specification process. And one of their concerns is that the contractors look for ways to switch to the product of a manufacturer that they have some sort of relationship with. That's a damaging perception for the contractor community, particularly as it attempts to present itself as an objective source of knowledge for designers.

One designer summed it up this way: "Enforce legal actions on contractors who do not order products in a timely fashion so their cronies can benefit after all of the time spent on selection with clients."

Other significant issues—and these come up year after year—include the sampling process, lead times, opaque pricing, green issues and installation, among others. Pricing and lead times are two of the biggest challenges for designers, but things don't ever seem to change. Lead times are a major stress factor these days, with the pressure to get jobs completed and make those spaces start functioning and earning their keep. Pricing transparency is an issue in just about every industry, and in most cases it's a source of tension between all the players involved—designers, end users, contractors and mill reps. All have a vested interest in their positions, so the status quo tends to prevail.

Designers cited sampling issues both in terms of the ease and speed of sampling and the need for greener sampling. Lack of installation expertise was also cited, and so was the need for more customization. Other issues with the specification

■ SPECIFICATION PROCESS WISH LIST

This year, designers were more vocal than ever about contractors switching out their products. Also important to designers is sampling, which they'd like to be quicker and easier— and, where possible, greener. Some expressed interest in improved virtual and printed representations as a way of offering a more environmentally friendly way of accurate preliminary sampling.

◆SWITCHING THE SPEC
- Dealers always trying to change designers' selections/Have GCs order materials in a timely fashion so reselections aren't required/Stop contractors from trying to switch out the spec because they order it too late/Educate reps on time needed to specify and respecify products when they try to switch product with contractor

◆SAMPLING
- It should be easier for designers to get product samples/ Quicker sampling/Half size tile samples to verify color and pattern first/Easier way to sample tile and tile books for library/ Need better color rendition online and in printed material to take guess work out of ordering samples online

◆LEAD TIMES
- Make the process faster/Improve delivery times/Shorter lead times/Better shipping delivery dates for LVT/"In an ideal world, I would reduce lead times, but that is the nature of the game"

◆PRICING
- More online pricing availability/Provide budget pricing to the architect to compare across the board/Would be nice if pricing was more accessible/More consistent pricing across the board/Upfront readily available non-fluctuating pricing

◆GREEN ISSUES
- Make sustainability have a larger role in the process/Improve recycling of samples/Cradle to cradle/Have companies recycle scraps/More recycling in sampling process/Get price of green products down so it is easier to spec

◆CUSTOMIZATION
- More customization in products, including size, colors, textures, etc., with a streamlined process/The ability to use custom colorways/That custom colors not be an upcharge/ Ease of specifying custom patterning

◆INSTALLATION
- Competent installers/Have certified installers for everything/ More installation idea starters

◆MOISTURE
- Make products that are more resistant to substrate moisture issues/Too many moisture issues in the slab/To not have to deal with moisture issues

◆TRANSITIONS
- Better transition options to other materials/"Solve more of my problems within a company, like, for example, Tandus Centiva's new transition strips"

process include frustrations with moisture in the substrate—and that relates to the larger context of working with general contractors, time pressures and scheduling. It's an issue that seems to be getting worse, and both contract dealers and facility managers also constantly complain about it.

Since the first survey, installation has been the top problem for designers. And up until a decade ago, about half of designers would regularly cite it as their top problem. Then the numbers started to fall until it made up less than a third of the votes. But in the last couple of years designers have become much more vocal about the lack of qualified, certified installers. It's a major problem throughout the flooring industry, in both the residential and commercial markets. And unions, which provide the most rigorous training, now represent a smaller percentage of the flooring installation workforce.

One issue that has improved, however, is maintenance. For the first time since 2006, poor maintenance was not in the second slot. Part of the reason that maintenance has improved comes from lessons learned in the recession, when it became clear that incorporating lifecycle costs into managing buildings and budgets could make the difference between surviving and going under. Following maintenance protocols has a huge impact on the lifecycle of flooring products, and businesses that ignore that tend to falter in the increasingly competitive and finely tuned commercial market.

■ TOP PROBLEMS

Improper installation is the perennial top problem for designers when it comes to floorcoverings. But after a decade of modest improvement, the problem is abruptly getting worse.

	2015	2014	2013
1. IMPROPER INSTALLATION	45%	35%	34%
2. MOISTURE	15%	12%	15%
3. POOR MAINTENANCE	14%	24%	16%
4. SLOW DELIVERY	10%	10%	12%
5. INCONSISTENT PRICING	6%	6%	6%
6. PRODUCT QUALITY	5%	6%	14%
7. PROJECT MANAGEMENT	4%	3%	1%
8. BAD PRODUCT ADVICE	1%	4%	2%

STYLE & COLOR

Flooring is a fashion item, but it's not high fashion, and it cycles much more slowly than fashion in apparel. Even automotive styling moves more quickly than flooring fashion. On top of that, flooring frequently serves as the field of the built environment's design, rather than the foreground, so its role is often to be subdued and even conservative, allowing furniture, lighting and accent elements to shine. That's why grey is the most common color cited by designers.

It's also worth noting that flooring can also be the showpiece, like in hospitality public space, some retail applications, and high-end corporate, among others. But foreground or field, it's still a designed product, and every detail matters, from textures and colors to scale of pattern to function and feel.

Floor Focus asked designers if they're satisfied with what's available from carpet mills in terms of color and style, and 86% said they were, which is on par with the last few years but up from 70% in 2010. On the hard surface side, 88% of designers said they were basically satisfied, which is up from last year but the same as in 2013.

Designers also weighed in on changes they would like to see in carpet and hard surface offerings in terms of color and design. Many said they are looking for more products targeting specific commercial sectors. On the hard surface side, designers are looking for more inventive, non-wood designs. In carpet, they're looking for more coordinated collections—and less grey.

Much like last year, designers cited frustration with the range of designs in hard surface flooring. While wood looks have driven LVT adoption in the commercial market, and have also been central to porcelain design for the last several years, designers want more creative options. The abstracted wood, linen, stone and leather visuals have been a movement in the right direction, but designers are also looking for options that don't use natural elements as a point of departure. And they also want the wood designs themselves to keep up with all the trends, like the look of wirebrushed European white oak.

In fact, wood look LVT received a lot of praise by designers, who also appreciated the new LVT plank formats on the market, and porcelain wood grains also received kudos, while VCT design rated as the top disappointment.

Until 2013, carpet tile was the perennial winner in the Hot Products list, but now the mantle has passed to LVT, which is the fastest growing flooring category in both the residential and commercial markets. Ceramic tile is also trending upward, moving into the third spot this year. Like LVT, ceramic can convincingly replicate any hard surface look, with hardwood visuals leading the way.

For the second year in a row, area rugs are toward the top of the list. This may relate to hard surface in general, and LVT in particular, taking share from carpet—often, hard surface flooring is warmed up with area rugs. In the corporate sector, area and accent rugs are growing, particularly in quiet areas of open plan offices.

Hardwood got more votes this year but still slid a spot,

■ WHAT'S IN NOW

According to designers, while clean 20th century modern looks remain in vogue, contemporary rustic and eclectic design, nature-inspired designs and cooler colorways are gaining momentum this year. And plank patterns, driven by wood looks in both porcelain and LVT, are also having a big influence on commercial interior design.

COLORS

While greys are as strong as ever this year, there have been clear trends outside of the neutrals that have dominated commercial design for the last few years. Namely, blues and greens are significantly more popular, often in field colors, while fiery colors have largely been confined to accents.

GREYS/NEUTRALS: Warm and cool neutrals/Neutrals and offbeat brights/Soft neutrals/Warm grey/Brighter and lighter with lots of grey/Varied with neutrals/Neutrals for carpet/Neutrals with bright accents/Dark greys/Greys with interesting patterns and accent colors/Subdued with hints of color/Grey and silver/Charcoal/Grey and taupe colors

BLUES & GREENS: Dusty deep blues/Mint/Retro mint/Teals are still hot/Sea foam green/Greens (lime and acid)/Bright shades of turquoise/Pale blue/Soft greens/Chartreuse/Muted blues and greens/Sage green/Aquas/Bright green

EARTH TONES & NATURALS: Taupe/Earth tones/Ocher/Natural colors/Whisky maple/Browns/Woods/Walnut/Beige

FIRE COLORS: Yellows/Burnt orange/Red/Coral/Marsala red/Tangerine/Gold

BRIGHTS: Pops of bright colors/Restrained brights/Brighter and lighter/Off beat brights/Splashes of bright colors

WHITE & BLACK: [Editor's note: All who cited black also cited white]

PATTERNS

This year, there appears to be a clear increase in patterns that relate to nature, from overall organics to wood and stone visuals and other nature themes. Also, there's more interest in bold geometrics, while linears are not quite as popular, and there were several mentions of large scale patterns.

ORGANIC, FROM ABSTRACT TO NATURE BASED: Natural/Organic/Subtle organic/Abstracted naturals/Natural and organic patterns/Organic striations/Earthy patterns and texture/Organic stripes/Wood/Stone texture/Nature-esque/Life elements

GEOMETRICS: Herringbone/Hexagons/Houndstooth/Checkerboard/Geometric with pops of color/Chevrons, plaids and houndstooth/Ikat/Large repeat geometrics/Geometric patterns reinvented/Architectural textures/"I think arabesque patterns are coming back"

LINEAR: Stripes/Bold stripes/Multi-directional linears/Fade linear/Linear for corporate/Classic stripes/Striations/Stripes and lines

GRAPHIC & TEXTURAL: Textures/Graphics for housing/Tight, textural clean design/Graphic black and white patterns from tribal-inspired to classic

LOOKS

This year, clean and sleek looks, generally influenced by the 20th century modern aesthetic, dominated the discussion, but increasing in importance are contemporary rustic and nature-based looks. Luxe looks continue to be largely absent.

20th CENTURY MODERN: Clean/Mid-century modern/Relaxed modern/Retro/Modern homey/Sleek and modern/Clean lines/Simple/Danish modern/Scandanavian/Modern with antique references/Modern without being too trendy

RUSTIC CONTEMPORARY: Industrial and rough/Tribal/Industrial chic/Raw, decomposed, rough edges/Industrial, contemporary/Deconstructed/Refined industrial

NATURE BASED: Replicating natural materials with lots of texture, global themes/Wood/Abstract interpretations of nature/Nature inspired/Natural elements

SOPHISTICATED: Bolder looks that combine different patterns/Yarns and weaves giving texture/Forward thinking/Architectural/Eclectic/Anything innovative/Rich with depth

■ HOT PRODUCTS

For the third year in a row, LVT has topped this list, ousting carpet tile. Ceramic is also strong this year, as are stone and hardwood. And broadloom rebounded from last year, when it was in the last spot on the list.

	2015	2014	2013	Don't Use
1. LVT	77%	67%	73%	8%
2. CARPET TILE	66%	66%	59%	4%
3. CERAMIC	44%	41%	38%	2%
4. AREA RUGS	42%	42%	25%	34%
5. STONE	34%	23%	18%	17%
6. HARDWOOD	33%	28%	26%	28%
7. BAMBOO	18%	17%	20%	53%
8. RUBBER	18%	24%	29%	17%
9. BROADLOOM	17%	9%	12%	14%
10. LAMINATE	16%	21%	15%	33%
11. SHEET VINYL	16%	13%	20%	25%
12. LINOLEUM	15%	25%	26%	28%
13. CORK	11%	13%	36%	57%
14. 6' ROLLS	8%	15%	17%	43%
15. VCT	5%	11%	8%	17%
FIBERS				
1. WOOL	19%	13%	20%	50%
2. NYLON	17%	15%	17%	17%

■ KUDOS

The top three vote-getters are the same as last year, with Interface easily on top and Shaw strong in second. Tandus Centiva, at third, was closely followed by Johnsonite— both are Tarkett commercial brands.

COMPANIES

1. Interface
2. Shaw
3. Tandus Centiva
4. Tarkett/Johnsonite
5. Milliken
6. Mohawk
7. Patcraft
8. Bentley
9. Forbo
10. Porcelanosa

Also mentioned, in order: Metroflor, Mannington, Masland, Floover, Daltile, Gerflor, Atlas, Cisa, Desso, Lonseal, Karndean, Altro, Nydree, Lea Ceramiche, Tai Ping

PRODUCTS

1. Luxury vinyl: Wood looks, new shapes and more
2. Porcelain tile: Patterns, wood grains,
3. Carpet tile: Planks and 18"x36" formats, walk-off styles

DISAPPOINTMENTS

1. VCT: Patterns and styles
2. Resilient in general: Homogeneous sheet/Bio-based/LVT/Woven vinyl

■ THE DESIGNERS' PRODUCT WISH LIST

When it comes to carpet, dissatisfied designers mostly cite the overabundance of grey, the need for more coordinating collections, with scale changes, and more products designed for specific sectors, like senior living. In hard surface, some designers say they need more trendy wood looks while others yearn for non-wood designs, and the consensus is that there is simply not enough design variety in hard surface to meet A&D needs.

ON CARPET

Too many greys and uninteresting tweeds/Patterns, colors have become extremely monochrome, too many greys, not enough pattern/Patterns all too modern and monochromatic/Need to get more color added to neutrals, and more than just one color per carpet/Need more pattern options/Need lots of patterns that coordinate with other patterns/More coordinating collections from small to large scale/Most flooring is very neutral and more textured today; missing the bold patterns that stand out/Could use crisper colors and better patterns for senior living/Not everyone does corporate; education needs colors that are timeless/Need more fun, bright colors trending with current color palettes/More bold prints and patterns, especially for hospitality design/Accents need to expand into shades and tones, not just brights/In carpet tile, selection feels limited and not high end, typically/"Can't find the right color shade ever! Wish I had more choice."

ON RESILIENT & HARD SURFACE

Across all flooring types, not enough options/Same old, same old/It all looks the same; need something that is not seen everywhere/Wood sheet vinyls still very limited and don't seem updated to wood colors available in other industries/For all wood look flooring, not enough oak finishes; and need both more conservative colors and bolder European influenced colors/More pattern/Not enough style for the right price/More dimensionality/In ceramic, need terrazzo designs/Also in ceramic, need more U.S. made products/In LVT, more non-wood designs/Need more modern woods in both hardwood and laminate

because votes for stone were up nearly 50%. VCT was down more than 50%. And one of the most interesting results was that broadloom votes nearly doubled, taking it from the bottom of the list last year up to the ninth spot. Part of the reason could be due to growth in hospitality business, which is the sector where broadloom has the strongest share. It's also strong in senior living, another growth category.

SPECIFYING GREEN

Green projects can be frustrating for designers because their ambitions are generally not matched by the vision of end users, so it's often an exercise in judicious compromise. Some goals are achieved, and often others are ignored entirely. Also

GREEN WISH LIST

Designers are more concerned about process than they are about product. This year, most of the criticisms were about standardization and greenwashing, which are really two sides of the same coin.

ON PRODUCT

MORE OPTIONS: Could use more/Limited true green product/All manufacturers should be producing green products/All products should consider environmental effects/Not enough

PRICING: More affordable and durable/Too expensive

ON PROCESS

STANDARDIZATION: Need to make an apples to apples comparison easier/Green website for all green products/Green overload; too many green "authorities" to follow/All products should be rated the same way/Need full transparency for all products

GREENWASHING: Too much greenwash and not enough clearly documented information/We get conflicting information/Sometimes companies greenwash

frustrating is the process itself, which is often opaque and willfully abstruse. But designers are fairly happy about the quality of green products on the market. This year, 88% reported that they're satisfied with the selection of green flooring, up from 85% last year.

GREEN LEADERS

Interface and Shaw together account for over 50% of the vote, though that's down from years past. And newly prominent on the list is J+J Flooring, which earlier this year was certified as a Zero Waste to Landfill manufacturer.

	2015	2014	2013
1. INTERFACE	34%	49%	45%
2. SHAW CONTRACT	20%	14%	14%
3. FORBO	9%	10%	4%
4. TANDUS CENTIVA	5%	3%	5%
5. J+J FLOORING	5%	1%	1%
6. BENTLEY	4%	2%	1%
7. MOHAWK GROUP	3%	3%	8%
8. FLOORFOLIO	3%	0%	0%
9. MANNINGTON	3%	2%	1%
10. ARMSTRONG	2%	2%	2%

Also mentioned, in order: Daltile, Crossville, Johnsonite, Florida Tile, To Market, Nydree, Patcraft, Mondo, Plyboo, US Floors

When asked if they need better information on green products, 51% said they did, compared to 47% last year and 39% in 2013. Numbers had been falling before 2013, suggesting that the new era of transparency, ushered in with LEED v4, created a new round of confusion, with its various declarations, red lists and other new tools. As one designer put it, "Just when you think you have it figured out, things change."

BEST OVERALL BUSINESS EXPERIENCE

Shaw Contract again topped Interface for Best Overall Business Experience. The firms have held those positions for seven years in a row. This year, Tandus Centiva took the third spot, and Patcraft moved from eighth to fourth. On the hard surface side, Daltile took back the top spot. Johnsonite and Armstrong both moved up one place, as did Tandus Centiva.

CARPET

	2015	2014
1. SHAW CONTRACT (1)	61%	74%
2. INTERFACE (2)	55%	65%
3. TANDUS CENTIVA (4)	45%	51%
4. PATCRAFT (8)	45%	41%
5. MANNINGTON (5)	44%	47%
6. MOHAWK GROUP (3)	43%	55%
7. BENTLEY MILLS (9)	40%	40%
8. J+J FLOORING (6)	39%	47%
9. MILLIKEN (7)	37%	42%
10. MASLAND CONTRACT (10)	34%	38%
11. ATLAS CARPET (11)	33%	35%
12. BOLYU (13)	18%	17%
13. DURKAN (12)	14%	22%
14. STARK CONTRACT (15)	8%	8%
15. BRINTONS USA (14)	5%	8%
16. PACIFICREST (16)	3%	5%
17. SIGNATURE (--)	3%	N/A
18. FORTUNE CONTRACT (17)	3%	5%
19. CLAYTON MILLER (18)	3%	3%
20. BLOOMSBURG (19)	3%	2%

HARD SURFACES

	2015	2014
1. DALTILE (2)	68%	72%
2. JOHNSONITE (3)	57%	71%
3. ARMSTRONG (4)	55%	65%
4. CROSSVILLE (1)	53%	73%
5. ROPPE (5)	51%	55%
6. MANNINGTON (6)	45%	49%
7. SHAW (8)	44%	41%
8. TANDUS CENTIVA (7)	42%	44%
9. AMERICAN OLEAN (11)	39%	38%
10. PATCRAFT (15)	37%	23%
11. FORBO (9)	36%	40%
12. FORMICA (10)	36%	39%
13. MOHAWK (12)	31%	29%
14. NORA RUBBER (13)	30%	29%
15. FLORIDA TILE (--)	28%	N/A
16. CAESAR CERAMICS (16)	26%	23%
17. STONEPEAK (17)	24%	23%
18. ABET LAMINATI (18)	21%	23%
19. FLEXCO (14)	16%	23%
20. ALTRO FLOORS (20)	16%	20%

GREEN KUDOS

Interface and its affiliation with Net-Works topped the list for the third year in a row, with kudos for Flor residential tile as well this year. And like last year, Forbo was second, with plenty of praise for its linoleum programs.

1. Interface: Net Effect and its Net-Works recycled fishing net partnership, and Flor residential tile
2. Forbo: Marmoleum, Marmoleum modular and plank formats
3. Shaw: Recycling abilities, along with Patcraft

Also mentioned: Johnsonite's cork/rubber products, Capri Cork, SmartStrand, Johnsonite linoleum, J+J's Kinetex

But even with product, there's plenty of skepticism because it's hard to distinguish green from greenwashing. One designer noted, "Every product says green in some way, shape or form, but not true green."

The biggest gripe relates to standardization, and in that way it's similar to pricing gripes from the Specification Process Wish List. Manufacturers have a vested interest in obscuring information and limiting a specifier's ability to compare apples to apples between manufacturers. And the bureaucratic complexity of going green, with competing certifications, various declarations, and complicated topics (like hazard versus risk) constantly misrepresented and misunderstood, lends itself to the overall confusion.

With so much noise, it should come as no surprise that designers seek out clarity and simplicity. And that's why the manufacturers with the most straightforward or succinct green stories, or those that provide the most clarity, stay in the foreground.

Interface, for instance, is always on top of the Green Leaders list, and in recent years its participation in the Net-Works program has also kept it atop the Green Kudos list, and part of the reason is because of its transparency. It provides an accounting of everything, including, despite what the naysayers may profess, the environmental profile of all of its supplied ingredients. And it only has one product, carpet tile, which makes it easier to grasp the whole story.

It's similar with Forbo, which is always high on both lists. To Americans, it's a producer of linoleum, a product so green you can practically eat it, even though the firm also makes vinyl products, among others. And Forbo is also unremittingly transparent.

Another is Shaw, which is always right behind Interface on the Green Leaders list. Shaw's adoption of the Cradle to Cradle philosophy, represented most visibly in its EcoWorx carpet program, gave the firm a lot of credibility. And it's a philosophy that is intuitive, with principles that are easy to understand.

Tandus Centiva moved up a spot on the Green Leaders list this year. Before they were merged, both Tandus and Centiva were already green leaders. Centiva was a leader in both recycled content and phthalate-free plasticizers, and Tandus has one of the oldest and most successful carpet reclamation and reuse programs in the industry.

Bentley Mills, a commercial carpet producer, jumped from tenth to sixth this year. The firm, which was for some time owned by Interface, has been a green leader in its own right for many years, and it's located in California, the greenest state. And FloorFolio, an LVT producer that just recently started manufacturing in New Jersey, also received kudos.

But the biggest increase in recognition this year went to J+J Flooring, a $120 million commercial flooring manufacturer. Earlier this year, the firm, which specializes in carpet and its Kinetex hybrid polyester tile, became the first in the flooring industry to be certified as a Zero Waste to Landfill manufacturer.

THE WINNER

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

- Felicia Wallace
  VOA Associates

AQUAFIL USA
Synthetic fibres and polymers

■ FAVORITE CARPET MANUFACTURERS

This year Interface got the upper hand over Shaw, winning four of the five categories. For the last nine years, the two firms have split the top spots in all categories. Other prominent performers this year were Mohawk, Tandus Centiva and Bentley Mills.

SERVICE

Interface narrowly broke Shaw's five-year hold on this category, Mohawk Group moved up a spot, Bentley and Patcraft moved up two, and J+J jumped four spots.

1. INTERFACE
2. SHAW CONTRACT
3. MOHAWK GROUP
4. TANDUS CENTIVA
5. PATCRAFT
6. BENTLEY
7. MANNINGTON
8. MILLIKEN
9. MASLAND
   J+J FLOORING

Also mentioned: Atlas, PacifiCrest, Aqua, Desso

QUALITY

Interface held the top spot this year, but the big surprises were Bentley, which jumped from fifth to second, and Mannington, which went from ninth to sixth.

1. INTERFACE
2. BENTLEY
3. SHAW CONTRACT
4. MOHAWK GROUP
5. TANDUS CENTIVA
6. MANNINGTON
7. ATLAS
8. J+J FLOORING
9. PATCRAFT
   MASLAND

Also mentioned: Milliken, Tai Ping, PacifiCrest, Desso, Stark

DESIGN

Interface won this category for the first time in eight years, edging out Shaw. Tandus Centiva jumped three spots. Patcraft made the list in the ninth spot.

1. INTERFACE
2. SHAW CONTRACT
3. TANDUS CENTIVA
4. BENTLEY
5. MOHAWK GROUP
6. ATLAS
7. J+J FLOORING
8. MASLAND
9. PATCRAFT
10. MILLIKEN

Also mentioned: Mannington, Tai Ping, PacifiCrest, Desso, Bolyu, Bloomsburg, Stark

PERFORMANCE

Interface held onto the top spot for the fifth year in a row. J+J Flooring went from Also Mentioned to seventh, and Milliken moved up to share tenth.

1. INTERFACE
2. SHAW CONTRACT
3. MOHAWK GROUP
4. TANDUS CENTIVA
5. MANNINGTON
6. BENTLEY
7. J+J
8. ATLAS
9. PATCRAFT
10. MASLAND
    MILLIKEN

Also mentioned: PacifiCrest, Desso, Stark

VALUE

For the sixth year in a row, Shaw won this category. Patcraft took back the second spot from Interface, J+J Flooring moved up two spots to sixth.

1. SHAW CONTRACT
2. PATCRAFT
3. INTERFACE
4. MOHAWK GROUP
5. TANDUS CENTIVA
6. J+J FLOORING
7. MILLIKEN
8. MASLAND
9. ATLAS
   BENTLEY

Also mentioned: Mannington, PacifiCrest, Northwest

■ FAVORITE RESILIENT & HARD SURFACE MANUFACTURERS

Like last year, four different manufacturers topped the five categories this year, with Armstrong winning two. But what's most interesting this year are the votes that didn't count— several designers voted for carpet mills that don't make or sell hard surface flooring.

SERVICE

Johnsonite moved up from fifth to win this category. Shaw moved up two spots, and Patcraft went from Also Mentioned to take the sixth spot.

1. JOHNSONITE
2. DALTILE
3. MANNINGTON
4. ARMSTRONG
5. SHAW
6. PATCRAFT
7. CROSSVILLE
8. FORBO
   ALTRO
   METROFLOR

Also mentioned: Tandus Centiva, American Olean, Mohawk, Florida Tile, Caesar, Gerflor, StonePeak, FloorFolio, Bolyu, Karndean

QUALITY

Armstrong took back the top spot this year. Mannington moved up from sixth to second, and Shaw went from Also Mentioned to take fourth.

1. ARMSTRONG
2. MANNINGTON
3. FORBO
4. SHAW
5. TANDUS CENTIVA
6. CROSSVILLE
   DALTILE
   JOHNSONITE
9. NORA
10. AMERICAN OLEAN

Also mentioned: Patcraft, Metroflor, Caesar, Bolyu, Mohawk, Gerflor, Karndean, Imola, Lonseal, Ergon, Fiandre

DESIGN

Tandus Centiva won this category for the first time. Daltile jumped from fifth to second, and Shaw went from ninth last year to take the fourth spot.

1. TANDUS CENTIVA
2. DALTILE
3. JOHNSONITE
4. SHAW
5. PATCRAFT
   ARMSTRONG
7. CROSSVILLE
8. MANNINGTON
9. FORBO
   KARNDEAN

Also mentioned: Fiandre, Emil Ceramica, Caesar, Lea Ceramiche, American Olean, Gerflor, Bolyu, Bisazza, Metroflor, Nora, StonePeak, Marazzi

PERFORMANCE

Daltile took the top spot from Armstrong. Mannington and Tandus Centiva went from sharing the sixth spot to second and third, respectively.

1. DALTILE
2. MANNINGTON
3. TANDUS CENTIVA
4. FORBO
   JOHNSONITE
6. ARMSTRONG
7. SHAW
8. NORA
9. CROSSVILLE
10. KARNDEAN

Also mentioned: Metroflor, Gerflor, American Olean, Mohawk, FloorFolio, CBC Flooring, Patcraft, Altro, Raskin, Fiandre

VALUE

Armstrong moved up a spot to win this category. Mannington and Crossville also moved up. Tandus Centiva and Metroflor both made it into the top ten.

1. ARMSTRONG
2. JOHNSONITE
3. MANNINGTON
4. CROSSVILLE
5. DALTILE
6. PATCRAFT
   FORBO
8. SHAW
   TANDUS CENTIVA
10. KARNDEAN
    METROFLOR

Also mentioned: American Olean, Altro, Nora, Formica, FloorFolio, Gerflor, Flexco, Mohawk, Caesar, Fiandre