

Merry Christmas and Happy New Year from the Commercial Flooring Report

Volume 44 • Page 1

for the Commercial Floor Covering Industry

TOTALLY GREEN PUBLICATION

December 2011

BUSINESS is PICKING UP

The world isn't ending after all. Business in many parts of the country is picking up. The Boston and Washington, DC markets are seeing steady increases in building as are many other large and small cities in the country. Conversations with clients around the country whether, architects, general contractors or flooring contractors have them seeing a return to where they were before the down turn or up significantly. One general contractor has hired over 100 people in the last year, another over 15 in the last six months, another architectural firm has hired 30 new people. Another general contractor is trying to hire people but can't find any that want to work, which is another dilemma. What's accounting for this and why?

CORPORATE

In the commercial market, those who have seen business increase can attribute it to clients being conservative and cautious about any type of expansion or investment in facilities over the last three or four years. Not everyone has suffered severe slowdowns but everyone has been less than optimistic and cautious about spending and investing. Given that this has been the mindset for so long and that the sky really isn't falling, those facilities with extended life cycles need care and sprucing up now. One motivator is the drive to be more efficient; doing more with less. Every business is doing this, especially retail stores but we'll get to them shortly.

The corporate client is reconfiguring, refreshing and updating and flooring is among those products that can easily make a space look new, like paint on the walls. By blending carpet with other flooring products such as wood, luxury vinyl tile and stone a space can take on a whole new image. Renovation revitalizes a business and makes people feel good. The better they feel the more productive they will be even if they're doing more work. A renovated space surrounds people in a cocoon where they can feel warm, comfortable and safe. If people are more productive, business and profits increase and the investment in renovation pays off exponentially.

RETAIL

In the retail market renovating stores keeps customers coming back. A homey, comfortable feeling is inviting and the more "residential" a space feels the more comfortable the customer feels. Whether selling shoes, clothing or electronics, the more inviting the facility the more the consumer feels comfortable about spending. In fact, psychologically, the more homey they feel, the more they will feel as if they're home enjoying the experience and the better the chances of making sales. Moving an occupant, customer or

client towards a more pleasurable experience will get them to feel better about spending time in the space. So it's just not about having to refurbish it's about instigating a conscious change in thought. Flooring material does that. Take notice of this when you're out shopping this holiday season and see how you feel about a store that has a beautiful floor and an inviting space and you be the judge of what pushes your buttons or turns you off.

HEALTH CARE

The health care market continues to be a bright spot with no slowdown in sight. Nursing homes and care facilities on various levels to accommodate the aging Boomer population are in great demand. These facilities cannot be cold and uninviting, they also have to have a homey, inviting and comfortable feel with as little hint of a medical establishment as possible. Included in this category can be gyms and physical fitness facilities. At long last the beefing up of the American population is starting to takes its toll on business and health. As people realize they could die from being too fat they have to exercise both physically and mentally to make a change. This is best done at a formal establishment that caters to this specific clientele and the need for these establishments is growing. The medical field is also one of the fastest growing businesses in the economy. Near where I live in the last year a women's health care facility has been built, two doctor's offices are just being completed and ground has just been broken on a new nursing home with more health related facilities inevitable. Hospitals we've done work for recently lament about still not having enough space. And emergency room space keeps expanding and never seems to be big enough. Nearly every hospital we've looked at with a flooring problem or trying to prevent one has involved the emergency rooms and operating theatres; two areas critical for saving lives. Another hint on the strength of this market is the demand for nurses now and into the future. This speaks for the growth that will continue in the health care market.

HOSPITALITY

The hospitality market is picking up. Las Vegas hotel bookings from a recent report have escalated to the high single digit figures and the rates are slowly inching up. Predictions are for business to increase up to 13% over the next year or so. Many projects in Las Vegas have been shelled in or stopped in progress and if business continues to improve we should hopefully start seeing at least a finish to what is now idol steel skeletons. But hotels all over have to keep up appearances and the higher the star ratings they have the more critical this is. No one wants to spend money on a name brand without it being in top notch condition. No flat screen TV means old fashioned today and a lack of customer care. Travel is up slightly and so will be stays in hotels. If the hotel,



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no matter the category, is not clean and inviting for the business or vacationing traveler, business will suffer. Hotel carpet life expectancies have been extended due to the economy but that can only be done for so long until the rooms look run down and used. We've reached that point in many hospitality facilities and that means renovations have to be done. Another consideration is the styling of the carpet or flooring. It's got to look like the cost of the room and have some style; no cold, bland, level loop type products in a four and five star property.

Education

The education market continues to demand upkeep and new buildings. High schools have grown, been built or need refurbishing. They receive high volumes of traffic on a continual basis. Again, we've seen this market continue to stay busy and it will continue to do so. For this market the flooring should be a high performance product that is capable of being kept clean with the ability to extend life expectancy for many years. It may be a larger investment up front but the extended amortization to 10, 15 or more years will actually make it less expensive and a better investment.

During the economic slowdown the carpet industry has invested heavily in new manufacturing technology. You may not know this but labor costs are only about 5% in carpet manufacturing. The highest cost is in the face of the product and the backing. New equipment is more versatile, flexible and eliminates outdated machinery. The manufacturers can, with this new equipment, do more with less even though the initial cost is far greater, millions instead of hundreds of thousands for a state of the art machine. The flooring industry is also extremely innovative and adaptive to challenges and changes in the marketplace.

WHO'S BEEN THE BUSIEST?

No question that on the soft side of the market carpet tiles are the hottest product going. The demand over the last two years has actually surprised the industry with increases greater than expected. Carpet tiles

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continue to steal sales away from broadloom and this will continue as the styling continues to improve. With some patterns it's difficult to tell if what's on the floor is tile or broadloom carpet. Carpet tiles are even finding their way more frequently into hospitality environments.

The hottest product on the market today is Luxury Vinyl Tile which can be made to look like wood, stone, metal or just about anything else. This product delivers high performance and cutting edge styling for any commercial application whether a night club or a nursery. In the health care and education market sheet vinyl and rubber flooring rule the roost. These products are made for these applications and are often creatively used to produce extravagant patterning of the floor with various colors and shapes being employed. High end and high performance wood is being used more and more as well. Remember that "homey" feel mentioned earlier in the healthcare market; wood is used to help create that feeling. It may not be used overall but it is installed in select locations where it will and can perform very well. Wood is also used extensively in the retail market; you can see this by going to any shopping mall. One more thing you'll see more often is concrete floors with a glossy finish. Most of this will be in the retail market but my opinion is that this will be more a fad than a long term thing. One of the reasons polished concrete is popular is the belief that it is less expensive to maintain and that the facility will not be plagued with moisture issues causing failing floors. The surface finish can still be influenced by substrate compromises and someday someone will want to put a flooring material down and, if there was a concern for the substrate, it will still be there. Concrete is also very hard on people working in the space as it offers no comfort for them or the patrons.

2011 has been a challenging year for most of the flooring industry but there have been stellar performances and growth for more than a few manufacturers. There have also been standout performances, as mentioned, in pockets of the country. Communication and information technology as well as technology in equipment certainly influences the flooring industry as well. The more time that passes the more the demand for renovation and new flooring increases. Flooring at

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some point has to be replaced and since it also makes a huge design statement and has such a large psychological effect on those that work in or visit a space, it can have a huge effect on any business. 2012 should see growth in the flooring and design industry's for these reasons.

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Session: WE10S| New Green Floor Covering Backings and Installation
Technology - Date | Time: Wednesday, January 25, 2012 | 12:00pm – 1:00pm**

Also we are doing a two day Inspectors Symposium that actually has relevant information for anyone in the flooring industry or has an interest in it. This will be on Monday and Tuesday Jan 23rd and 24th here is the program information.

Floor Covering Inspectors Symposium (FCIS) by: Textile Consultants, and LGM and Associates

Monday, January 23, 2012, Mandalay Bay Hotel and Casino Carpet Floor Covering Inspections

8:30 am – Registration – **Mandalay Bay Convention Area**, Las Vegas

9:00 am - Welcome to the **Floor Covering Inspectors Symposium (FCIS)**, **Larry Cooper, Textile Consultants**. Discussion about

9:30 am - State of the carpet industry, inspection industry and the cleaning industry, **Chris Davis**

10:00 am - What is New in the carpet industry? **Lew Migliore, LGM and Associates, Technical Flooring Services**, Dalton, GA; The floorcovering industry, sales and the economy and the downturn of the inspection industry. What is happening with claims, what are we seeing now and what can you expect in the future. **Introducing the New IICRC S800 Standard and Reference Guide for Carpet Inspection of Textile floor Covering**

10:30 am - Break

10:50 am - Onsite Textile and Flooring Inspections, The inspection process

12:00 pm - Lunch On Own

1:30 pm - **Field and Laboratory Testing: Carey Mitchell, Shaw Industries, Lee Phillips, Professional Testing Laboratories**, This is a hands on process showing the new **IICRC S800 section on Field and Laboratory Testing**. Some of the hands on tests include:

- How to order Lab Testing
- Tuft Bind – Loop and Cut Pile
- Filament Slippage
- Bundle Encapsulation
- Velcro Roller Testing
- Benzoyl Peroxide Testing

3:00 pm - Break

3:15 pm - The IICRC S600 Carpet Installation Standard and Reference Guide, the Committees, the Chapters and the Process. **Barry Costa, IICRC Certification Council Chairman, IICRC S600 Vice-Chairman**, Aspire Educational Institute and Conference Centre, Kingman AZ.

4:15 pm - The Art of Report Writing – **Jeff Bishop**, What are we looking for in the written carpet inspection..

5:15 pm - Final Wrap Up, Questions and Answer
Networking.....

Tuesday, January 24, 2012, Mandalay Bay Hotel and Casino Hard Surface Floor Inspections

8:30 am – Registration – **Mandalay Bay Convention Area**, Las Vegas

9:00 am - Welcome to the **Floor Covering Inspectors Symposium (FCIS)**, **Lew Migliore, LGM Associates**

9:30 am - State of the Hard Surface Industry, inspection industry and the cleaning industry, **Resilient Floor Covering Institute**

10:00 am – Substrate Issues; Adhesive Issues, Benny Woods, AAT

10:45 am – Break

11:00 am – Wood Flooring and Laminate Issues – Dave Horan

12:15 pm – Lunch on your own

1:35 pm – Ceramic Tile Issues – Donato Pompo

2:20 pm – Vinyl, Rubber, Linoleum Tile and Sheet Good Issues – Lew Migliore

3:20 pm – Break

3:40 pm – Hands on Cleaning and Maintenance Issues on Hard Surface Floors – Dane Gregory, Interlink Supply

4:45 pm - The Art of Report Writing – **Lew Migliore**

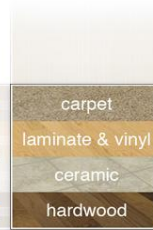
5:15 pm - Final Wrap Up, Questions and Answer

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