Product Intelligence

RANKINGS AND INSIGHTS ON THE INTERIOR INDUSTRY'S
MOST SPECIFIED PRODUCTS AND MATERIALS

ISSUE 6 | DATA FROM JAN 1 - DEC 31, 2020 | PUBLISHED JUN 2021

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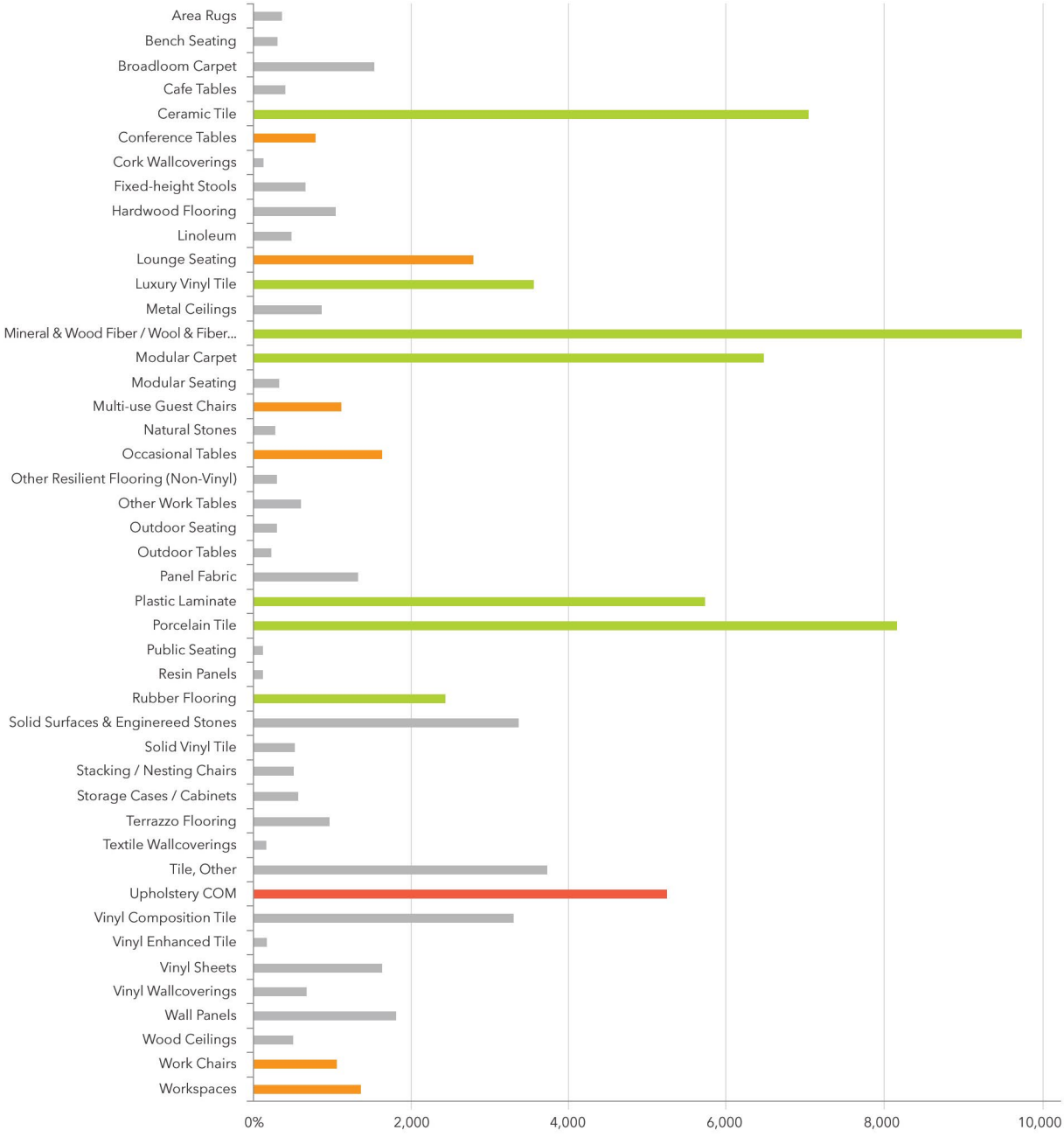
Table of Contents

2020 Didn't Keep Us Down: 84,183 Specs Reviewed!

Pretty good numbers for an unprecedented year in which construction starts dropped, manufacturers had a protracted spending freeze, and many interior design projects were suspended indefinitely or canceled outright.

With 45 categories, we focus on those experiencing the most activity. We feel this context is important for readers to process the reports that follow. Columns in color are included in this issue. To access the columns in gray, please contact **info@Analytics.Design**.



You Are Intelligent.

Your products should be too.

CARPET ROLL	Primary	Secondary
Beige/tan	0.2%	3.2%
Black	23.8%	30.5%
Blue/Aqua/Purple	4.6%	5.2%
Brown	16.9%	22.1%
Gray	48.1%	33.0%
Green	3.8%	4.7%
Orange/Yellow/Gold	0.6%	0.2%
Pink/Red	1.9%	1.0%

CARPET TILE	Primary	Secondary
Beige/tan	0.5%	1.5%
Black	23.0%	32.4%
Blue/Aqua/Purple	6.4%	5.7%
Brown	10.4%	19.9%
Gray	52.7%	32.8%
Green	4.3%	4.7%
Orange/Yellow/Gold	0.9%	1.0%
Pink/Red		

This just scratches the surface of what Design Analytics can do.

- Categorize by color, pattern type, shape, wear-layer thickness, and installation method
- Find out which products perform best for each segment: commercial, education, hospitality, government, residential
- Get customized reports of your products' specifications
- See the most-specified products in all categories of interior products

Anticipate trends. Maximize performance.

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Contact **info@analytics.design** or Mark Daniel, VP of Analytics, at **254-488-2350** to find out more.

Facing COVID

By Joe Starr

Sometime around late February 2020, as COVID fears spread and the world began to realize that much of the economy was going to shut down, the bottom dropped out from the business furniture market. Manufacturers froze spending, architects stopped projects in their tracks, and interior designers found themselves out of work—with various polls reporting that up to 75% of designers had experienced postponements or cancellations. The commercial office furniture sector was hit hard—harder than many other sectors, in fact. Factories were shuttered, salaries were cut, employees were furloughed, and thousands were permanently laid off.

> "Manufacturers froze spending, architects stopped projects in their tracks, and interior designers found themselves out of work."

Nor did one have to be in the trenches of the industry to apprehend this reality. Knoll's stock plummeted from $25/share in February to around $9 in April, rebounding to approx. $13 at end of Q4. Revenues for both Steelcase and Herman Miller followed suit, with steep declines between March-May 2020, the former dropping to a level not seen since 1998, date of their initial public offering. And while large segments of the economy recovered relatively quickly, the major furniture manufacturers were slower to respond: Steelcase and Herman Miller experienced respective losses of around 50% from March to December.*

Among the many challenges manufacturers face in the post-COVID world, perhaps the most pressing is the seismic shift in purchasing. All at once, the traditional specification process—in which teams of HR people, architects, interior designers, facilities managers, and finance reps order truckloads of specialized products (requiring teams of skilled technicians to assemble)—was turned upside down. As a recent Reuters article puts it, "None of [the major manufacturers] was prepared for a flood of orders for a single adjustable desk from stay-at-home workers suddenly trying to figure out how to conduct Zoom meetings from spare bedrooms."

Unprecedented challenges require innovative solutions. Editorial content for this issue of Product Intelligence focuses on how COVID has impacted the industry—and how the industry is responding. Broadly speaking, we're focused on three central concerns:

1. What is happening: How did specifications change in 2020 compared to 2019? Are we seeing additional changes as we enter 2021?

2. What are we doing about it: How did manufacturers respond to their own challenge of returning to work? How has product development changed to address the new workspace (and work-at-home) realities? What will this new workspace look like?

3. What's going to happen: How permanent is the shift to home-based work? How important is it to return? What can we learn from those companies that have already announced their post-pandemic policies? What is the meaning of work within the context of a dedicated workspace?

Thank you for being here and for being a part of the industry's response to the pandemic. While we all shared in the pain, we can also all participate in the change. There's a certain amount of comfort in that. So as scary as it's been, it's also tremendously exciting: we believe there are huge opportunities ahead.

**Stock prices for the major manufacturers eventually caught up with other industries . Entering the final week of June 2021, Knoll's share price was 26.06 and Herman Miller's was 47.37 (up from 17.79 in April 2020). These numbers are likely influenced by Herman Miller's acquisition of Knoll in April of 2021.*

Coact - Modular Lounge by OFS

Speculating About Specs:

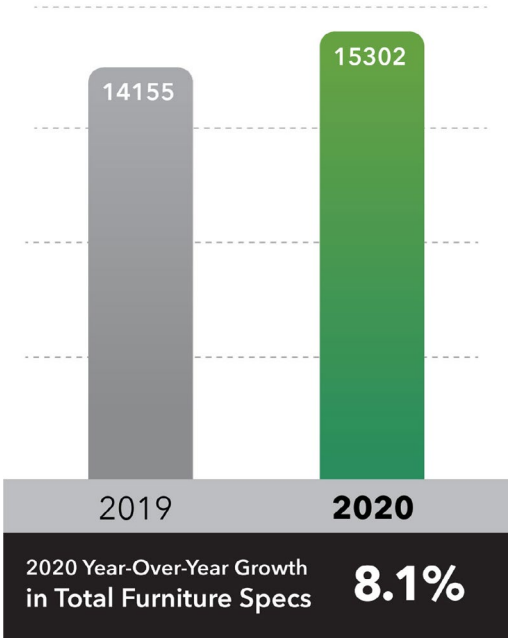
How COVID has Influenced Purchasing Patterns and Product Development

By Joe Starr

Popular opinion has it that 2020 was a difficult year for commercial furniture manufacturers. Shutdowns in production began in March, and the great transition to work from home hindered many companies as purchasing patterns shifted from Steelcase and Herman Miller to direct-to-consumer behemoths like Amazon and Wayfair. Though the major manufacturers were hit fairly hard (at least in terms of share value), when we step back and look at the bigger picture, we find that 2020 was not necessarily as onerous as it might seem, at least in terms of overall specifications.

Looking at the data, we see that furniture specification activity on Designer Pages wasn't down. In fact, it actually increased by 8%! Though this may be explained by a possible increase in overall subscriptions, that in itself would be an indication that 2020 saw more activity than many supposed.

TOTAL FURNITURE SPECS 2019 V 2020



SPEC. % FOR ALL CATEGORIES OF FURNITURE

CATEGORIES	Total 2019	% of total 2019	Total 2020	% of total 2020	Abs. change	Change	Change Specs
Café / Dining Tables	514	**3.6%**	478	**3.1%**	-0.5%	-14%	-7%
Conference Tables	934	**6.6%**	720	**4.7%**	-1.9%	-28.7%	-22.9%
Fixed-Height Stools	492	**3.5%**	625	**4.1%**	0.6%	17.5%	27%
Lounge / Modular	2454	**17.3%**	2993	**19.6%**	2.2%	12.8%	22%
Multi-use Guest	1083	**7.7%**	1025	**6.7%**	-1%	-12.4%	-5.4%
Occasional Tables	1306	**9.2%**	1499	**9.8%**	0.6%	6.2%	14.8%
Stacking / Nesting Chairs	399	**2.8%**	366	**2.4%**	-0.4%	-15.1%	-8.3%
Storage	1799	**12.7%**	1753	**11.5%**	-1.3%	-9.9%	-2.6%
Work Chairs	1316	**9.3%**	953	**6.2%**	-3.1%	-33%	-27.6%
Workspaces	1124	**7.9%**	1196	**7.8%**	-0.1%	-1.6%	6.4%
Other	2734	**19.3%**	3694	**24.1%**	4.8%	25%	35.1%

2019	# Specs	Rank
Lounge / Modular	2454	1
Storage	1799	2
Work Chairs	1316	3
Occasional Tables	1306	4
Workspaces	1124	5
Multi-use Guest Chairs	1083	6
Conference Tables	934	7
Other Work Tables	569	8
Café / Dining Tables	514	9
Fixed-Height Stools	492	10
Stacking / Nesting Chairs	399	11
Education-Specialized Tables / Desks	377	12
Bench Seating	367	13
Education-Specialized Seating	241	14
Training Tables	233	15

2020	# Specs	Change
Lounge / Modular	2993	Same ●
Storage	1753	Same ●
Occasional Tables	1499	4 to 3 ▲
Workspaces	1196	5 to 4 ▲
Multi-use Guest Chairs	1025	6 to 5 ▲
Work Chairs	953	3 to 6 ▼
Education-Specialized Tables / Desks	777	12 to 7 ▲
Conference Tables	720	7 to 8 ▼
Fixed-Height Stools	625	10 to 9 ▲
Education-Specialized Seating	588	14 to 10 ▲
Other Work Tables	569	8 to 11 ▼
Café / Dining Tables	478	9 to 12 ▼
Stacking / Nesting Chairs	366	11 to 13 ▼
Training Tables	301	15 to 14 ▲
Bench Seating	277	13 to 15 ▼

That doesn't mean it wasn't a tumultuous year for specifications, as we did see some significant re-adjustment in the spec. percentage of each category.

The charts above compare specifications for calendar year 2019 with those of 2020 for all categories of furniture. The big losers here are work chairs, with a 33% decrease, and conference

Editor's Note: Design Analytics acquires and analyzes data on an ongoing basis. Accordingly, there may be slight differences in data cited in articles and that provided on category pages. The discrepancies reflect different compilation dates.

tables, with a 29% drop. Stacking/nesting chairs, café/dining tables, and multi-use guest chairs also experienced significant decreases. Categories with the largest increases include fixed-height stools (18%) and lounge/modular furniture (13%). The "other" category—incorporating segment-specific furniture for education, hospitality, and healthcare—experienced a combined 25% increase. And a significant portion of that was for education-specialized tables/desks and education-specialized seating, with 106% and 144% increases respectively. While the education segment may have experienced less of a slowdown than workplace—especially where government funds had already been earmarked for future projects—this growth is still impressive.

The drop in conference tables makes intuitive sense, as standard safety protocol includes removing larger pieces to enhance social distancing, not to mention that home workers are definitely not outfitting their homes with 16-foot tables. The category of work chairs is perhaps a bit more elusive, as one might anticipate a spike in this most utilitarian of office items and certainly not the change in rank shown from #3 to #6. Several explanations are plausible here: 1. those moving to full-time work-from-home already had a home office complete with work chairs; 2. work chairs that fit the aesthetic and the scale of an open workspace do not fit that of an apartment or home; 3. home-based workers wanted them but were unable to get them. The latter thesis gets some support when we look at the top-performing manufacturers in each category.

As seen at right, in the work chairs category, perennial performers (and largest companies) Steelcase and Herman Miller experienced slight decreases while SitOnIt Seating (55%) and KI Furniture (249%) experienced significant increases. KI Furniture also exhibited strong growth in the stacking/nesting category. Though based on a small sampling, this pattern of growth in categories that experienced significant declines suggests a certain staying power: it may point to a shift towards smaller manufacturers who are more equipped to transition to direct-to-consumer fulfillment and also better able to fulfill orders on projects whose parameters had changed because of safety concerns. Notably, KI emphasizes fulfillment with an easy, streamlined ordering process and a quick-ship option with a 3-10 day arrival guarantee, as well as 2-day shipping on select lines of tables and chairs.

"This level of choice and flexibility holds great appeal for managers and designers newly tasked with navigating the foreign terrain of the post-COVID workplace."

SPEC. % BY MANUFACTURER FOR CATEGORIES SHOWING DECLINE

CONFERENCE TABLES	% of total 2019	% of total 2020	Abs. Change	Change
OFS Furniture	12.8	7.4	-5.3%	-41.7%
Steelcase	8.2	6.9	-1.4%	-16.6%
Coalesse	6.4	6.4	0.1%	0.9%
Herman Miller	5.9	6.2	0.3%	5.4%
Nucraft	4.5	5.9	1.5%	33.1%
All Others	62.3	67.1	4.8%	0.1%
WORK CHAIRS				
Steelcase	17.5	17	-0.5%	-2.8%
KI Furniture	3.2	11	7.9%	248.8%
SitOnIt Seating	6.5	10	3.5%	54.5%
Herman Miller	10.3	8.9	-1.4%	-13.3%
OFS Furniture	6.5	4.1	-2.4%	-37.4%
All Others	56	48.9	-7.1%	-0.1%
STACKING/NESTING CHAIRS				
KI Furniture	13.8	31.8	18%	130.6%
SitOnIt Seating	6.3	6.8	0.5%	8%
Smith System	1.6	5.2	3.6%	223%
Global Furniture Group	3.3	4	0.7%	21.5%
Carolina, an OFS Company	0	3.4	3.4%	0%
All Others	75.1	48.8	-26.3%	-0.3%

While KI does not participate in e-commerce platforms for retail, they nevertheless excel at providing light, space-sensitive products. Especially with their extensive offerings of portable and stacking chairs, they have a large inventory of streamlined

products that may help in the transition to a socially distanced workspace. They're also among the most affordable of the larger commercial manufacturers, and they provide detailed downloadable pricing statements for all pieces, so users may see accurate pricing that reflects options, including specified upholstery and finishes. This level of choice and flexibility holds great appeal for managers and designers newly tasked with navigating the foreign terrain of the post-COVID workplace. Perhaps most tellingly, KI is the only large brand that does not sell through dealers. It's possible that economies of scale realized with this model gave them an advantage during the acute phase of the pandemic.

SitOnIt Seating had a relatively good year as well, with a 55% increase in work chairs. Contrary to KI, SitOnIt emphasizes their direct-to-consumer capability. The landing page of the website caters to home workers with a dedicated work-from-home subpage focusing on the Reya tables and Wit Chairs and offering perks for buyers including a dealer discount code and free residential delivery.

Reya Desk and Wit Chair by SitOnIt Seating

So what of the categories experiencing positive change? Can work-from-home explain the notable increase in lounge/modular furniture and fixed-height stools? If we've perhaps discovered a clue in the ascendancy of KI Furniture and SitOnIt Seating as documented above, does the thesis hold with the categories that have grown? Have these relatively smaller companies taken a bite out of the Majors' market share because they're simply better positioned to service individuals?

SPEC. % BY MANUFACTURER FOR CATEGORIES SHOWING GROWTH

FIXED-HEIGHT STOOLS	% of total 2019	% of total 2020	Abs. Change	Change
KI Furniture	6.6	14.3	7.7%	116.4%
Coalesse	8.3	8	-0.3%	-4%
Herman Miller	3.6	5.5	1.9%	53.8%
OFS Furniture	6.7	2.8	-3.9%	-57.9%
Andreu World America Furniture	0.9	2.8	1.9%	222.2%
Blu Dot Furniture	0.8	2.7	1.85	226.9%
Steelcase	4.5	2.6	-1.9%	-42.4%
Bernhardt Design	0.9	2.4	1.5%	180.3%
Muuto Furniture & Lighting	2.8	2.4	-0.4%	-14.5%
LOUNGE / MODULAR				
OFS Furniture	8.8	6.7	-2.2%	-24.7%
KI Furniture	2.5	6	3.5%	140.7%
Coalesse	4.9	5.3	0.4%	9%
Bernhardt Design	6.1	4.5	-1.6%	-26.3%
Arcadia Furniture	3.6	3.1	-0.5%	-14.2%
Turnstone	1.8	2.2	0.4%	22.5%
Herman Miller	2.2	2	-0.3%	-11.6%
Naughtone	1.1	1.8	0.7%	63%
HBF Furniture	0.7	1.8	1.1%	153.2%
Hightower	3.3	1.7	-1.6%	-47.6%

As seen in the charts on pg. 9 above, for fixed-height stools, highest growth was experienced by Blu Dot Furniture (227%), Andreu World America Furniture (222%), Bernhardt Design (180%), and KI Furniture (116%); while the steepest declines were shown by OFS Furniture (-58%) and Steelcase (-42%). In lounge/modular furniture, KI Furniture and HBF Furniture grew substantially (141% and 153%), while OFS Furniture (-25%) and Bernhardt Design (-26%) experienced the sharpest losses. Nevertheless, OFS Furniture remains in the top spot in this category with a 6.7% specification percentage.

"KI managed to increase their share of specifications in categories that experienced significant increase, as well as in categories that dropped sharply."

The diffuse concentration of lounge/modular furniture makes speculation somewhat difficult, as no single company possesses an overwhelmingly large share of specifications (the top ten account for only 36.8%). Even so, KI Furniture's ascendance to the second spot may be noteworthy. Fixed-height stools is slightly more concentrated among fewer firms, with the top ten accounting for 46% of all specifications. In this context, KI Furniture's 14.3% share of specifications is especially impressive.

One takeaway from all of the above is that KI managed to increase their share of specifications in categories that experienced significant increase, as well as in categories that dropped sharply, signaling either an effective targeted response to some of the challenges of the pandemic, or a product line and fulfillment process inherently responsive to demands for workplace safety. Or a combination of the two.

Are similar patterns reflected in the top-performing products? Looking at the top specified products in each of these categories reveals a continued pattern of impressive growth for KI Furniture and companies of similar size. In fixed-height stools, KI inhabits spots #1 and #2, with the 600 Series Industrial Stools (spec. rate of 6.8% and growth of 174%) and the Strive Café Stool (4.3% rate and 5.9% growth). The work chairs category shows a similar ascendance for KI. While Steelcase still inhabits the #1 spot with the Think Chair, this product actually declined by 38% , while SitOnIt Seating's Lumin and KI's Oath Task Chair (#'s 2 and 3) both showed impressive growth at 302% and 344%. And in lounge/modular furniture, KI is similarly impressive. At a spec rate of 8.9% and growth of 43%, KI's MyPlace Lounge Furniture was approximately 7% ahead of the second most specified product.

SPEC. % BY PRODUCT

FIXED-HEIGHT STOOLS	Spec % 2020	S.G. Real	S.G. Absolute
600 Series Industrial Stools *by KI Furniture*	6.77	174.05%	4.30%
Strive Cafe Stool *by KI Furniture*	4.35	5.87%	0.24%
Ponder *by Keilhauer*	2.92	16.86%	0.42%
WORK CHAIRS			
Think *by Steelcase*	5.45	-37.81%	-3.32%
Lumin *by SitOnIt Seating*	4.41	301.63%	3.31%
Oath Task Chair *by KI Furniture*	4.35	343.97%	3.37%
LOUNGE / MODULAR			
MyPlace Lounge Furniture *by KI Furniture*	8.81	42.79%	2.64%
Coact - Modular Lounge *by OFS Furniture*	1.91	13.37%	0.23%
Lagunitas Lounge System *by Coalesse*	1.36	96.28%	0.67%

S.G. : Spec. Growth

Lumin Task Chair by SitOnIt Seating

Oath Task Chair by KI Furniture

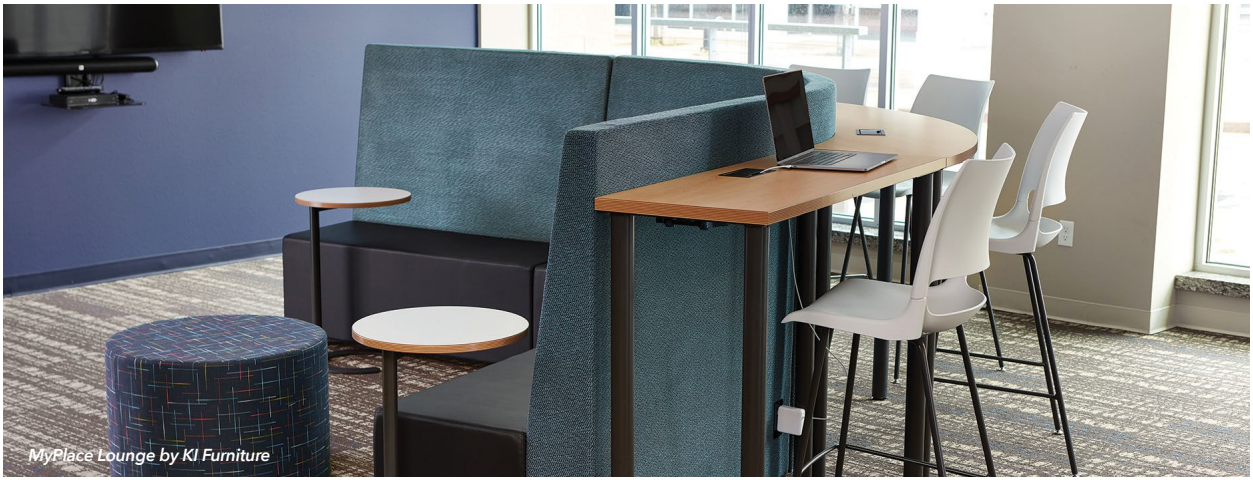
Perhaps the most notable feature of MyPlace is flexibility. It features round, crescent, hex, or square modules; a variety of back heights (up to 60"); integrated power with no hard wiring; and in-line table options. The units are also extremely lightweight–they may be pushed, rolled, or carried for ease of configuration. And it offers integrated storage–keeping the area clutter-free without disrupting the flow.

OFS Furniture's Coact – Modular Lounge may also give us a glimpse of what's to come. At a specification rate of 1.9%, it inhabits the #2 spot. While this seems fairly far behind MyPlace, it should be considered alongside its companion Coact – Lounge since both are elements of the same product family. In view of the latter's performance (#6 at 1.2% and showing the highest growth in the category at 305%), the Coact family performed exceptionally well in 2020. Coact - Modular Lounge is similar to MyPlace. With high-back modules that can be linked in a variety of linear and curved configurations, it offers "multiple levels of private and social settings, empowering people to choose how they achieve their day." And when combined with the Coact - Lounge elements (streamlined lounge chairs and sofas with fixed arms), the products offer an enhanced degree of freedom and flexibility–options to bring people together or emphasize privacy and distance. Neither MyPlace nor Coact is new.

The former debuted in the fall of 2019 and the latter has been around since 2016. But even if they're not an immediate consequence of the pandemic, they're still exceptionally prescient. Both of these top performers exhibit the kind of "soft architecture" that has gradually yet insistently eroded the harder lines of the most conventional of open offices.

"While no one may have predicted the extent of 2020's upheaval, it's no coincidence that products like MyPlace and Coact were on the upswing during this unprecedented year."

The term is certainly broad and may seem somewhat vague, yet it works on both literal and figurative levels, referring simultaneously to the upholstered surfaces, the curvy shapes that break up space and diversify sight lines, the integrated power and data, and the inherent flexibility. These are adaptable products geared to respond to all manner of change, and while no one may have predicted the extent of 2020's upheaval, it's no coincidence that products like MyPlace and Coact were on the upswing during this unprecedented year.



MyPlace Lounge by KI Furniture

Coact - Modular Lounge and Coact - Lounge by OFS

While 2020 seems to have been a somewhat anomalous year for specifications, our data doesn't show a full-scale upheaval. Perhaps the most noteworthy development is the rise in specs for relatively smaller companies—and the ways in which some of the aforementioned firms (especially OFS, KI, and SitOnIt) showed growth in product categories with increased specs (fixed-height stools and lounge/modular furniture), as well as categories with decreased specs (work chairs and conference tables). Nor can we say with certainty that this is a trend that's likely to continue in the future. Given the stock losses of major companies like Steelcase and Herman Miller in early 2020—and the general pattern of decreased specifications among them—it seems to have been a difficult year for the largest companies. However, this may only represent a temporary redistribution.

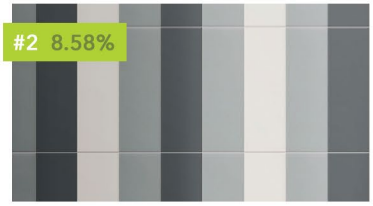
Data suggests that postponed projects began to gear up in Q420 and early 2021. As these suspended orders have begun to be fulfilled, it appears that the largest of the companies will overcome the "COVID lag time" and regain their usual pace of specifications. The current stock prices for Herman Miller and Knoll certainly suggest this. We look forward to revisiting these trends throughout 2021 as the industry continues adjusting to post-pandemic realities.

ARCHITECTURAL FINISHES

Ceramic Tile

TOP 3 SPECIFIED (OF 500)

Semi Gloss and Matte
by Daltile



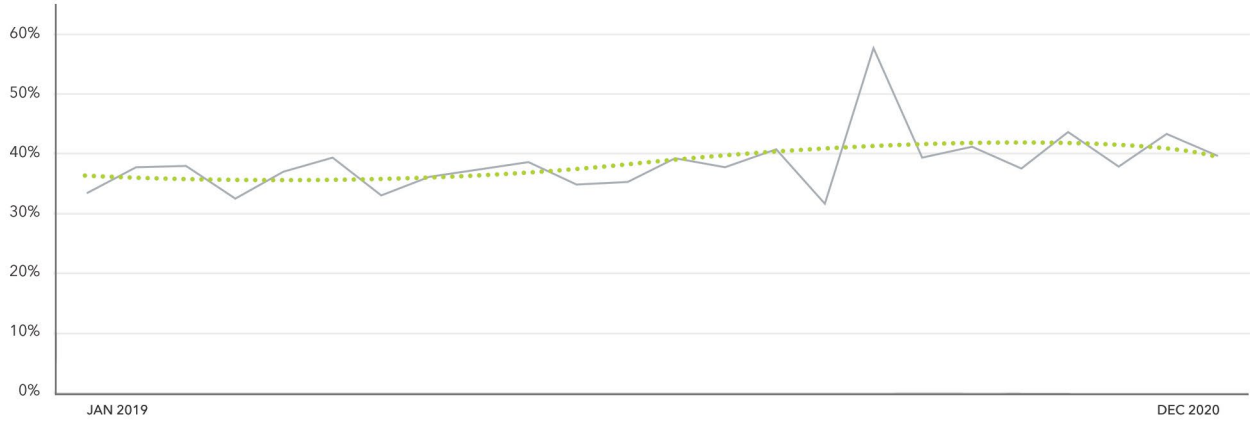
Color Wheel Collection - Linear
by Daltile

Color Wheel Collection - Classic
by Daltile

TOP 10 SPECIFIED (OF 389)

#1	daltile	29.89%	Search Rank #1 // *Previous #1*
#2	AMERICAN OLEAN PROVEN IN TILE	13.83%	Search Rank #2 // *Previous #3*
#3	CROSSVILLE	8.07%	Search Rank #6 // *Previous #5*
#4	INTERCERAMIC	4.09%	Search Rank #16 // *Previous #20*
#5	floridatile	3.20%	Search Rank #23 // *Previous #30*
#6	CERAMIC TILE CO. Est. 1993	2.82%	Search Rank #NA // *Previous #NA*
#7	MARAZZI	2.39%	Search Rank #8 // *Previous #7*
#8	Summitville	1.82%	Search Rank #111 // *Previous #99*
#9	Mosa.	1.50%	Search Rank #3 // *Previous #4*
#10	SENECA TILES	1.31%	Search Rank #112 // *Previous #86*

% CERAMIC TILE / TILE



To view extended product or brand lists and/or filter by market segment or location, please contact info@Analytics.Design.

ARCHITECTURAL FINISHES

Luxury Vinyl Tile

TOP 3 SPECIFIED (OF 500)

Natural Creations Diamond 10 Tech...
by Armstrong Flooring Commercial

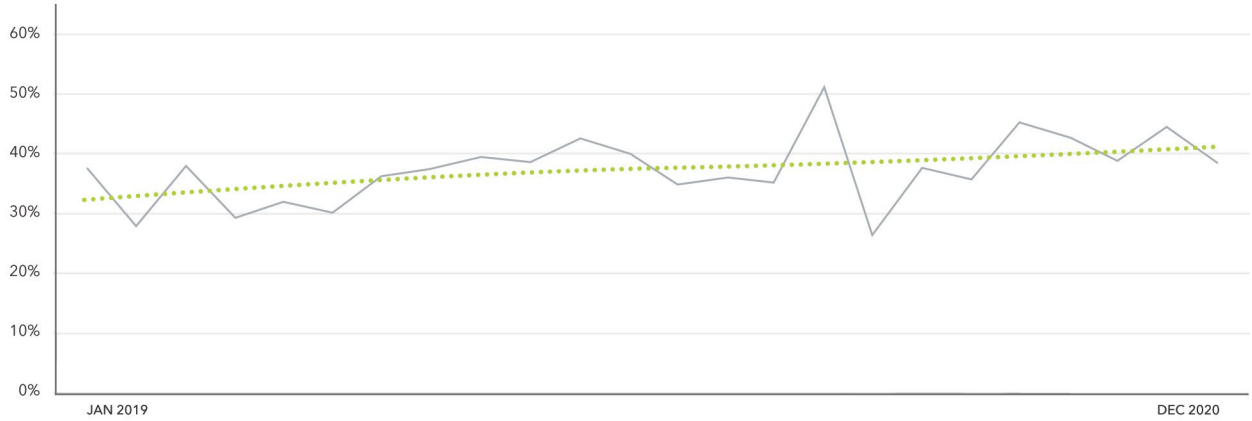
Contour
by Tarkett Flooring

Studio Set
by Interface

TOP 10 SPECIFIED (OF 211)

#1	Mannington Commercial	14.67%	#6	patcraft	7.39%
		Search Rank #4 // *Previous #4*			Search Rank #9 // *Previous #8*
#2	Armstrong Flooring Commercial	14.19%	#7	Interface	5.58%
		Search Rank #5 // *Previous #3*			Search Rank #6 // *Previous #6*
#3	shaw contract	13.36%	#8	Karndean Designflooring	1.98%
		Search Rank #1 // *Previous #2*			Search Rank #41 // *Previous #37*
#4	Tarkett	10.70%	#9	Milliken	1.65%
		Search Rank #2 // *Previous #1*			Search Rank #10 // *Previous #9*
#5	Mohawk Group	8.14%	#10	Shaw Floors	1.54%
		Search Rank #3 // *Previous #5*			Search Rank #46 // *Previous #48*

% LVT / VINYL

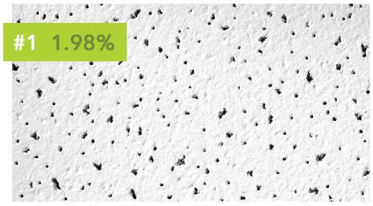


To view extended product or brand lists and/or filter by market segment or location, please contact info@Analytics.Design.

ARCHITECTURAL FINISHES

Mineral & Wood Fiber / Wool & Fiber Gla...

TOP 3 SPECIFIED (OF 500)



FINE FISSURED: 1728
by Armstrong Ceilings & Walls

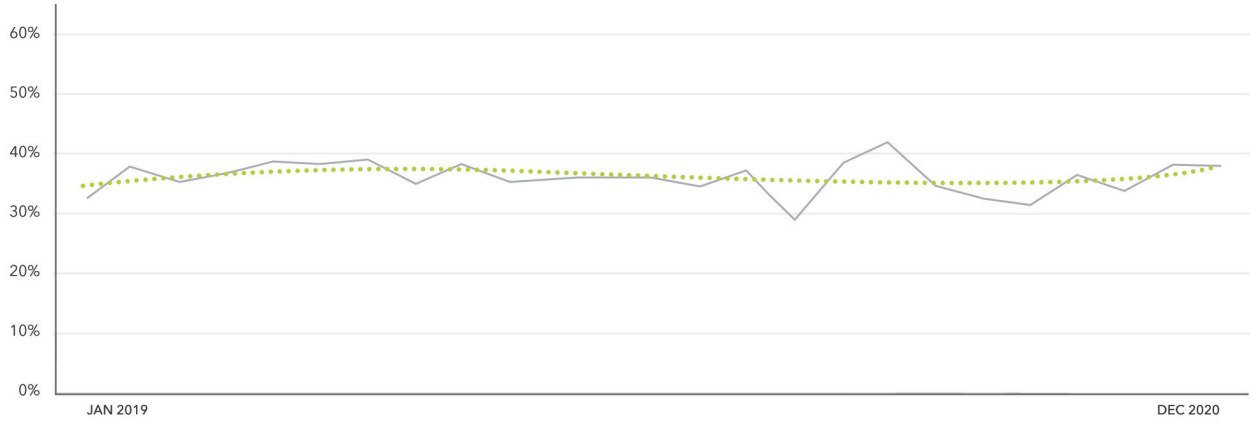
ULTIMA Lay-In and Tegular: 1910
by Armstrong Ceilings & Walls

KITCHEN ZONE: 673
by Armstrong Ceilings & Walls

TOP 10 SPECIFIED (OF 142)

#1	Armstrong CEILING & WALL SYSTEMS	48.88%	Search Rank #1 // *Previous #1*
#2	USG	24.85%	Search Rank #2 // *Previous #2*
#3	CertainTeed	16.34%	Search Rank #3 // *Previous #3*
#4	Rockfon	5.61%	Search Rank #4 // *Previous #6*
#5	CONWED	0.44%	Search Rank #17 // *Previous #20*
#6	HunterDouglas	0.43%	Search Rank #9 // *Previous #7*
#7	ACP	0.41%	Search Rank #NA // *Previous #NA*
#8	National Gypsum	0.37%	Search Rank #79 // *Previous #82*
#9	AMERICAN GYPSUM	0.27%	Search Rank #NA // *Previous #NA*
#10	decoustics SAINT-GOBAIN	0.17%	Search Rank #8 // *Previous #9*

% MINERAL WOOL CEILINGS / C SYSTEMS



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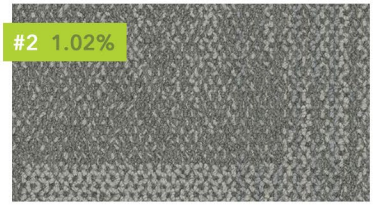
ARCHITECTURAL FINISHES

Modular Carpet

TOP 3 SPECIFIED (OF 500)

On Line
by Interface



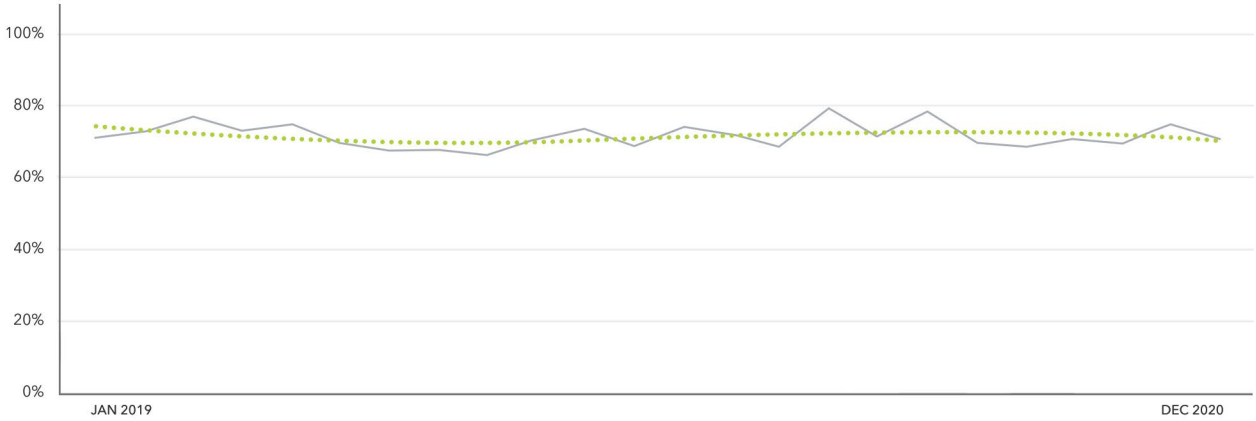
AE311
by Interface

Bigelow Carpets
by Mohawk Group

TOP 10 SPECIFIED (OF 203)

#1	shaw contract®	18.55%	Search Rank #2 // *Previous #1*
#2	Interface®	17.36%	Search Rank #5 // *Previous #5*
#3	Mohawk Group	11.63%	Search Rank #6 // *Previous #6*
#4	Mannington COMMERCIAL	8.60%	Search Rank #8 // *Previous #8*
#5	Tarkett	8.29%	Search Rank #4 // *Previous #4*
#6	patcraft®	7.79%	Search Rank #7 // *Previous #7*
#7	Milliken	7.59%	Search Rank #3 // *Previous #3*
#8	J+J FLOORING	6.57%	Search Rank #10 // *Previous #10*
#9	BENTLEY	3.55%	Search Rank #1 // *Previous #2*
#10	Lees est. 1846	1.54%	Search Rank #119 // *Previous #87*

% MODULAR CARPET / CARPET



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ARCHITECTURAL FINISHES

Plastic Laminates

TOP 3 SPECIFIED (OF 500)

#1 3.06%

Frosty White 1573
by Wilsonart Laminate & Countertops

#2 2.04%

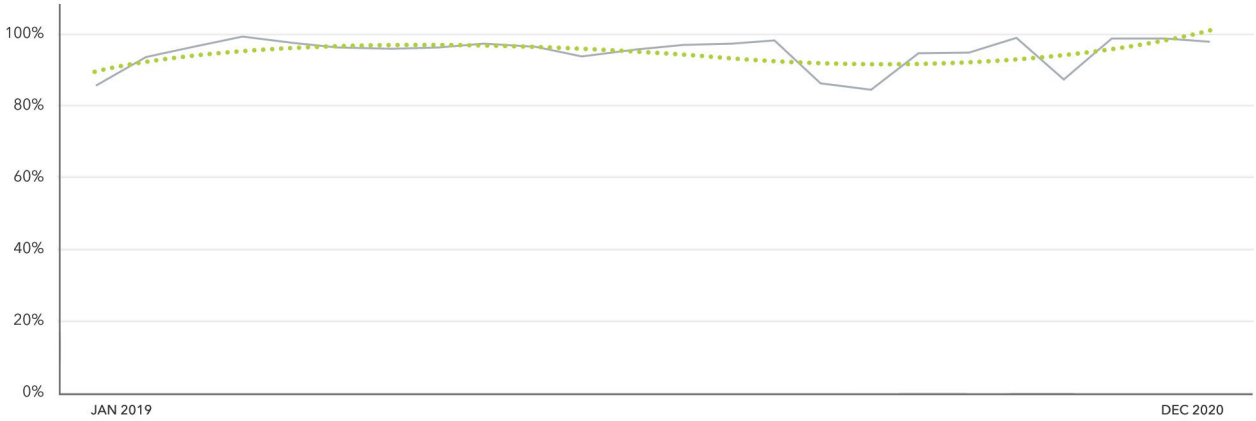
Designer White D354
by Wilsonart Laminate & Countertops

Landmark Wood 7981
by Wilsonart Laminate & Countertops

TOP 10 SPECIFIED (OF 179)

#1	Wilsonart	35.84%	Search Rank #3 // *Previous #2*
#2	FORMICA	26.86%	Search Rank #1 // *Previous #3*
#3	panolam SURFACE SYSTEMS	12.20%	Search Rank #23 // *Previous #29*
#4	LAMIN-ART	6.07%	Search Rank #17 // *Previous #22*
#5	nevamar	5.08%	Search Rank #6 // *Previous #12*
#6	ABET LAMINATI	3.86%	Search Rank #4 // *Previous #6*
#7	ARBORITE	3.20%	Search Rank #12 // *Previous #17*
#8	pionite	2.47%	Search Rank #15 // *Previous #20*
#9	Westinghouse	0.50%	Search Rank #NA // *Previous #NA*
#10	PIONEER PLASTICS	0.38%	Search Rank #NA // *Previous #NA*

% PLASTIC LAMINATES / ALL LAMINATES



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ARCHITECTURAL FINISHES

Porcelain Tile

TOP 3 SPECIFIED (OF 500)

Keystones
by Daltile

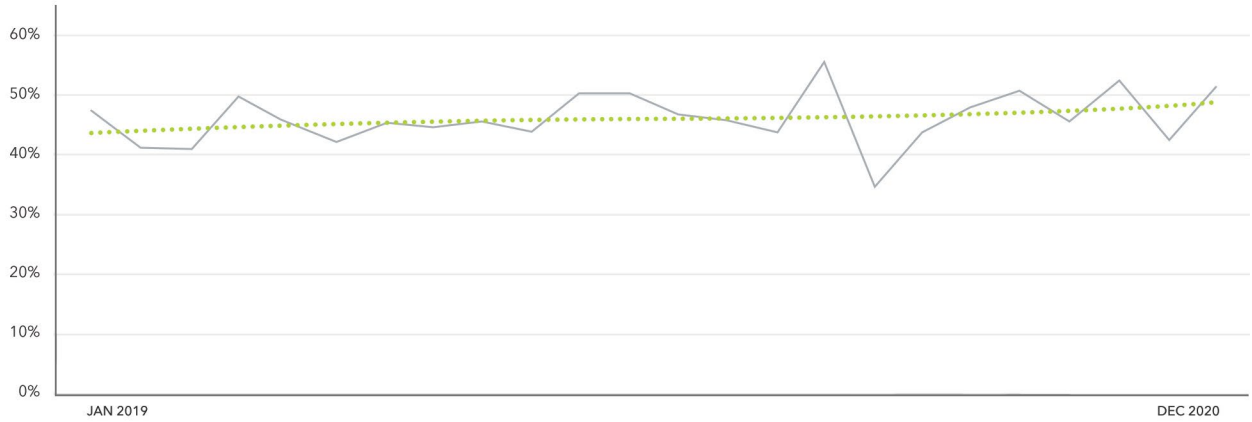
Volume 1.0
by Daltile

Portfolio
by Daltile

TOP 10 SPECIFIED (OF 410)

#1	daltile	24.72%	Search Rank #1 // *Previous #1*
#2	CROSSVILLE	11.87%	Search Rank #2 // *Previous #2*
#3	AMERICAN OLEAN PROVEN IN TILE	10.39%	Search Rank #6 // *Previous #4*
#4	floridatile	3.37%	Search Rank #13 // *Previous #17*
#5	INTERCERAMIC	3.32%	Search Rank #26 // *Previous #49*
#6	MARAZZI	2.31%	Search Rank #9 // *Previous #6*
#7	atlas concorde	1.87%	Search Rank #12 // *Previous #9*
#8	Emser Tile	1.73%	Search Rank #16 // *Previous #13*
#9	ceramic technics ltd	1.68%	Search Rank #3 // *Previous #7*
#10	CONCEPT SURFACES	1.44%	Search Rank #21 // *Previous #23*

% PORCELAIN TILE / TILE



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ARCHITECTURAL FINISHES

Rubber Flooring

TOP 3 SPECIFIED (OF 495)

noraplan environcare™
by Nora Rubber Flooring

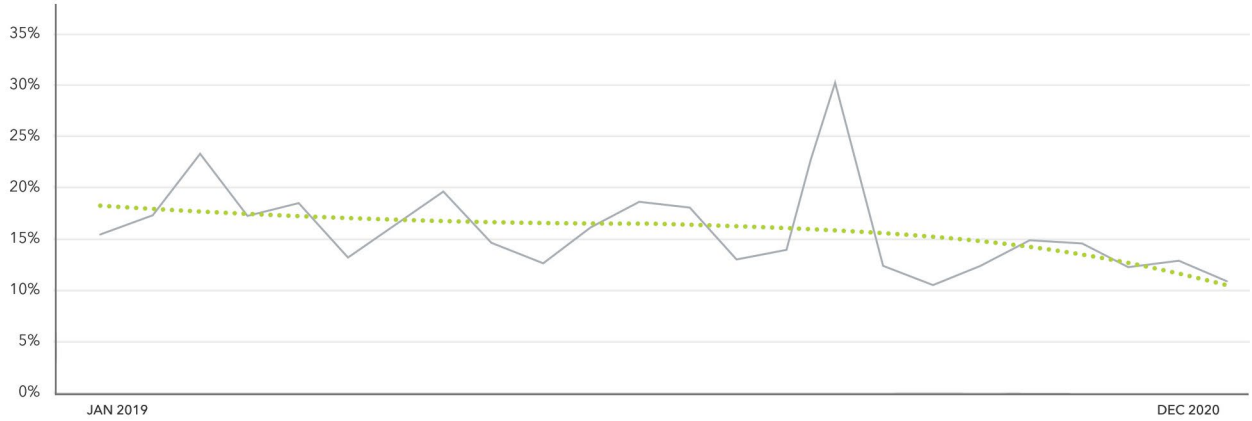
MICROTONE™ RUBBER TILE
by Tarkett Flooring

Solid Color
by Tarkett Flooring

TOP 10 SPECIFIED (OF 208)

#1	Tarkett	15.06% Search Rank #2 // *Previous #2*	#6	FLEXCO	6.26% Search Rank #34 // *Previous #36*
#2	nora®	12.11% Search Rank #1 // *Previous #1*	#7	ecore Commercial	3.83% Search Rank #3 // *Previous #5*
#3	ROPPE.	10.57% Search Rank #10 // *Previous #11*	#8	ecore Athletic	3.01% Search Rank #27 // *Previous #22*
#4	MONDO	7.24% Search Rank #14 // *Previous #12*	#9	Armstrong FLOORING COMMERCIAL	2.63% Search Rank #11 // *Previous #7*
#5	Mannington COMMERCIAL	6.54% Search Rank #9 // *Previous #10*	#10	Robbins	2.28% Search Rank #72 // *Previous #83*

% RUBBER / RESILIENT



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NeatHub by Humanscale
A Surprisingly Important Player in the Post-COVID Workspace

Get Back: Mid-Sized Companies Discuss Safe Return

By Joe Starr

Will the workspace remain as we knew it? What needs to be done to ensure safety? How can we balance these precautions with overall wellbeing? What does the post-COVID workspace look like?

With work-from-home the new normal in many companies (and with many employees expressing a preference for it), we might be overlooking evidence that could help to answer some of these questions—namely, the behavior of the very companies who help to fashion these spaces.

> "Right out of the gate we saw a huge push for desk screens—to decrease transmission and provide some level of comfort… People came back by mid-summer, and all of us felt very safe."

While commercial office furniture manufacturers were not immune from the COVID shutdown, they were—by necessity—more proactive in returning employees to collaborative spaces: "That's just the nature of the work," says Azar McMaster, VP of Product Development at 3form, "it requires easy, quick interaction and constant brainstorming."

For 3form, safe return began with a meeting between company CEO Wynn Clayton and EHS (Environment, Health, and Safety) Manager Steve Allen, who created a defined set of procedures to ameliorate risks. They immediately went to masks, wellness monitoring/temp. checks, and social distancing.

They also modified conference rooms by removing chairs and providing visual markers for spacing. And they made partitions: "right out of the gate we saw a huge push for desk screens—to decrease transmission and provide some level of comfort… People came back by mid-summer, and all of us felt very safe."

Those familiar with 3form's flagship product will see the connection here. Varia is made of PETG. It's a durable, translucent, architectural-grade resin with a minimum of 40% post-industrial, pre-consumer content. It's also GreenGuard Indoor Air Quality Certified with an extensive range of finish options—just the right formula for fashioning the multitude of space dividers, desk screens, and mobile partitions that are coming to a safer workspace near you. Varia is also a sandwiched construction with options for transparent/translucent finish, color, texture, pattern, and interlayer; thus, it nicely embodies the idea of design choice and flexibility within a specific product.

Because they provide a quick fix, partitions are perhaps a good place to begin the challenge of safe return, yet they're really just the tip of the iceberg, as longer-term trends will involve choice across the entire spectrum of furniture. Like McMaster, Jonathan Webb, Workplace Director at KI Furniture, sees choice as a defining element not only of workplace safety, but also of comfort and general wellbeing: "On the corporate side, the theme of the day is flexibility… we're being asked to provide a kit of parts to make spaces more compact or larger on the fly."

"These clients will need to have a rapid shift in their thinking… increasing investments in technology and power/data infrastructure, moving from desktops to better and bigger laptops, and relaxing their expectations about assigned workstations."

KI's perspective is unique, in part because they didn't experience the same kind of urgency as many other firms did. Yes, they closed offices and sent workers home, and some projects dried up or became perpetually postponed, but beyond a brief glitch, manufacturing proceeded apace. Webb credits KI's resilience to smart business practices and vertically integrated manufacturing, as well as to diversity of clientele. Many of their accounts are with government entities or publically funded educational facilities—"the areas in which government funds are already spent… those kinds of projects tend to move faster."

3form Flek Partitions made of Varia resin

Webb also portrays the efforts of KI's IT team as heroic: "They set up our work-from-home program within a week… maintaining a sense of connectivity between the plants and manufacturing side to the design team to the global sourcing folks." The work-from-home strategy has been quite successful. Webb states that even though most non-manufacturing workers remain home (when employees began returning to work, offices were at approximately 15-20% capacity), KI held their own in 2020, and 2021 already looks auspicious: "Nine out of ten clients who froze spending weren't canceling projects but just putting them on hold… those are starting to gear up again and there's a lot of CARES money out there that's likely to end up in building renovations."

Regarding the look of the post-COVID workplace, Webb returns to the buzzword of flexibility. He acknowledges that work-from-home is likely to be a fixture of the future, even though most of his corporate clients want employees to return to the workplace—and to maintain the one person-one workspace layout that still feels so familiar: "But these clients will need to have a rapid shift in their thinking… increasing investments in technology and power/data infrastructure, moving from desktops to better and bigger laptops, and relaxing their expectations about assigned workstations."

Humanscale VP of Product Development Design & Engineering David Wong also identifies advancements in technology as a fundamental component of safe return. He's excited about anything that enables flexibility, like infrastructure that can create privacy zones and/or facilitate collaboration. Such products can make it easier for workers to change location within the office, without sacrificing efficiency or productivity. Wong specifically mentions cable management, smart devices, and portable power: "anything that easily allows people to move from point a to point b… the ability to quickly transform space, to reconfigure, to go outside if you want and not have to worry about finding a plug."

Regarding their own safe return, Wong emphasizes that Humanscale got right to work on developing protocol and products to keep their employees safe—"pivoting and creating products, like our line of separation panels, that offer a flexible, easily configurable style that translates across a number of environments to help with social distancing." They also employed the tried and true tactics of masks, temp. checks, and basic hygiene protocol while similarly looking at computational fluid dynamics research (how air currents move within a space): one respected study in JAMA showed that coughs and sneezes may go as far as 16 feet. And they commissioned their own studies to simulate airflow with and without panels, concluding that many of the virus particles are retained within the space, over 50% of them, in fact, which then end up on surfaces that require deep cleaning.

"Overall, Humanscale's ecommerce sales were up 200% in 2020, with significant increases in seating, foot rockers, sit/stand products, and cable management solutions."

So this suggests a one-two punch of partitions (or anything that helps to break up space) and products that facilitate cleanliness. The logical next step is to incorporate resilient surfaces—those that can withstand deep cleaning—as well as innovations that help keep surfaces neat and tidy, like the cable/infrastructure management mentioned above. Humanscale's experience with getting employees back to the office makes for a decent model of the more generalized evolution we're likely to see in society at large. Yes, there are going to be more partitions and an increase in divisible space, but these will be configurable, subject to aesthetic preference and the needs of the moment.

Furniture is also likely to be scalable. Wong notes that one response on the product development side was smaller chairs, tables, and desks that fit better in certain work-from-home environments. Available direct-to-consumers with a quick-ship option, these have been in great demand. Overall, Humanscale's ecommerce sales were up 200% in 2020, with significant increases in seating, foot rockers, sit/stand products, and cable management solutions.

Float Table by Humanscale

Specifically, home sales for the Float Tables—a streamlined sit/stand desk with an intuitive counterbalance mechanism and variety of widths and depths—were up 500%.

> "We need to think outside of the square-feet-per-person mindset… and we're also trying to avoid cheap fixes… ultimately, what we've seen is that the interest in collaborative spaces has been strengthened by work-at-home."

Smaller-scale stuff was a great strategy for 2020, in which many manufacturers developed or grew direct-to-consumer ambitions and fulfillment protocol, but the idea of furniture with a smaller footprint is wise whatever the venue—it's an intuitive way to open up spaces and facilitate social distance. But neither should we try to keep ourselves too far apart, as sociability is, after all, one of the main reasons we go to work.

That question—why we want or need to work around or with others—drives the thinking of Doug Shapiro, OFS VP of Research and Insights. He outlines a general approach to safe return that speaks to the exigencies of the moment, yes, but also suggests a broad-minded view that looks to the future. "We need to think outside of the square-feet-per-person mindset… and we're also trying to avoid cheap fixes… ultimately, what we've seen is that the interest in collaborative spaces has been strengthened by work-at-home."

Thus, at OFS the task is to "return to collaboration" without compromising safety. Their first step was to install outdoor air duct flow stations and Steril-Aire UVC fixtures into each of the main air handling units. These systems are automated to provide fresh air and targeted irradiation of mold and bacteria, thus minimizing respiratory stressors and, according to Jarod Brames, OFS Director of Sustainability, "creating an interior environment that has helped to better protect our employees from the virus as well as help them feel comfortable and safe within the building."

If we think about where the dollars should go, or, better said, how best to direct resources in order to make workspaces not only habitable, but also healthy and even invigorating, improving air quality is a good start. In fact, there's a decent case to be made that for many offices this should be job one. But what's job two?

Not that we necessarily need to prioritize these different elements—as many of them are symbiotic and will naturally co-evolve—but Steelcase's ongoing "Ready for What's Next" series engages safe return by doing just that.

Their examination of three distinct phases—"Now", "Near", and "Far"—proposes a gradual process for changing space and altering existing (or introducing new) product in order to increase safety and enhance wellbeing. Many of these are common-sense changes that we've naturally gravitated to during the pandemic, but this formalizes it into a useful paradigm and helpful plan.

The image below demonstrates how to incorporate some of these ideas in a rapid retrofit—introducing in-line tables as natural spacers, increasing the distance between seating, and incorporating a high partition. The arrangement also includes mobile storage to create an additional boundary.

The relatively simple alterations detailed above provide a glimpse into one aspect of the post-COVID workspace. However, these represent an approach that might be described with the colloquialism "no-brainer." For the truth is that reconfiguring space and retrofitting furniture are the easy part—any way we can use furniture to both enhance safety and improve comfort/accessibility will probably be universally accepted. What's likely to be more difficult is to balance the changing expectations of employees. A recent CNN poll shed light on how some of the most prominent companies are handling return-to-work. The strategies are slightly skewed along industry lines—with tech companies expressing more receptivity for a hybrid model and finance slightly less.

Work Boardwalk by West Elm; Flex Screen by Steelcase; Depot Storage by Turnstone

RETURN-TO-WORK POLICIES OF MAJOR COMPANIES*

Return 3x week in September
"There has been something essential missing from this past year: each other."

Encouraged to spend at least half their time in the office
"Employees may apply for remote work if their role allows."

For now, up to employees whether to continue working remotely
"The future of work is flexibility."

30% of U.S. staff returning to office in July
"People have benefited from aspects of working remotely."

Welcomed employees back to the office on June 21.
"We're progressing on our journey to gradually bring our people back together again."

Expects all US-based employees back in the office by early July, subject to a 50% occupancy cap.
"Working together in person is important for our culture, clients, businesses and teams."

But whether companies seem rigidly determined to return to pre-COVID times or to go bravely into this strange new world, they will be dealing with an entirely new type of employee. As workers begin to evolve out of 100% work-from-home, employers should remember that we've all been through a collective trauma. Some of us were impacted directly by COVID through severe illness or death; some of us less directly; but life has changed for us all in big ways, and it won't be so easy to change back. Though it's probably not feasible in every case, a general approach of handling employee preference on a case-by-base basis might make the most sense. And we should be particularly careful to avoid dichotomies and the accompanying disadvantages and potential stigma among those who prefer to work from home and those who want to go back full time.

Our discussions with Humanscale, 3form, KI Furniture, and OFS provide a kind of preliminary litmus test for the "Now," "Near," and "Far" elements, giving a basic map for how to reconfigure space in order to enhance safety post-COVID. The approach generally involves reducing density by removing the largest pieces and organically increasing the distance between seats; adding division/increasing protection by using desk screens and mobile partitions; improving efficiency and cleanliness via power/data solutions and cable management; enhancing tech to facilitate remote work/meetings; and incorporating modular elements to make spaces more adaptable and resilient.

It's encouraging to see how the different approaches talk to one another—how these ideas are intersecting and beginning to build momentum for the future, irrespective of the size or market share of the company. At the very least, the confluence of strategies suggests that these different companies are on to something. But nor should we miss the forest for the trees. As companies begin to develop timelines and protocols for returning to the workspace, we musn't forget about the individual component. We have to respect that some of us have thrived under work-from home; some of us have powerfully missed the camaraderie of the communal workspace; and many of us are somewhere in the middle. The more we keep this in mind, the more the post-COVID workplace emerges not as some indecipherable enigma to be endlessly pondered and feared, but rather as an opportunity—to acknowledge what we've learned about how work gets done, to recognize the pros and cons of flexible working styles, and to create new tools that will universally improve the workplace experience.

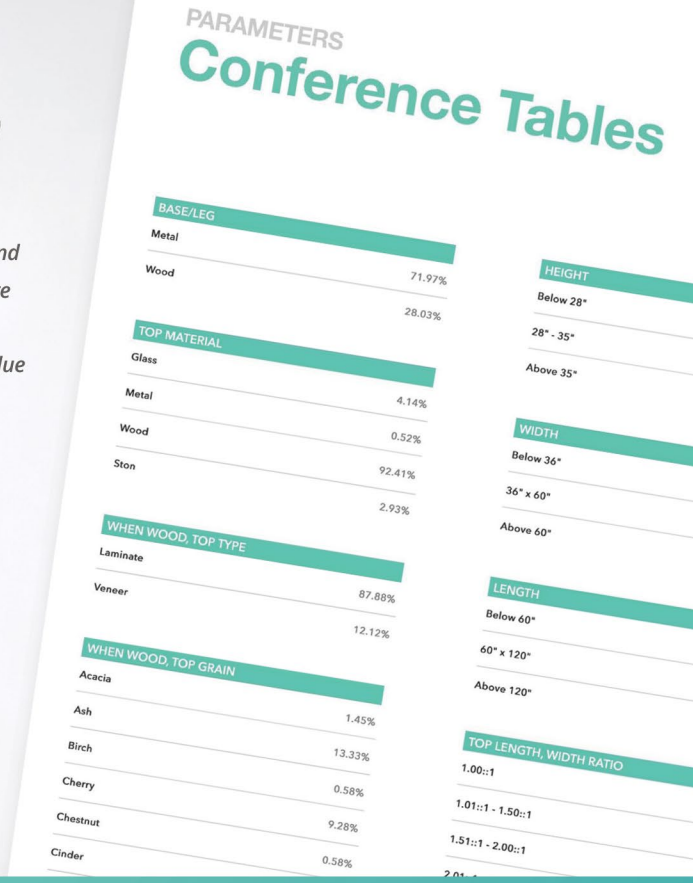
**Return-to-Work Policies of Major Companies, compiled from information in "Here are the companies rushing workers back to the office – and the ones that aren't" at https://www.cnn.com/2021/06/19/business/return-to-office-company-policies/index.html*

Intelligence *noun*

in·tel·li·gence | \ in-’te-lə-jən(t)s

1. *The capacity to learn, reason, and understand*
2. *The ability to apply knowledge to manipulate one’s environment*
3. *The collection of information of strategic value*

Are your products **intelligent?**



They should be.

At Design Analytics, we have our eyes on interior construction activity. We aggregate product and material selection for thousands of projects to track performance by category, product type, specific product, and segment.

We can even break down specification activity by dimensions, base type, and top material.

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Be Intelligent.

Design **Analytics**

Contact **info@analytics.design** or Mark Daniel, VP of Analytics, at **254-488-2350** to find out more.

FURNITURE

Conference Tables

TOP 3 SPECIFIED (OF 500)

#1 7.32%

SW_1 Conference Table
by Coalesse

#2 4.13%

EndZone
by Spec Furniture

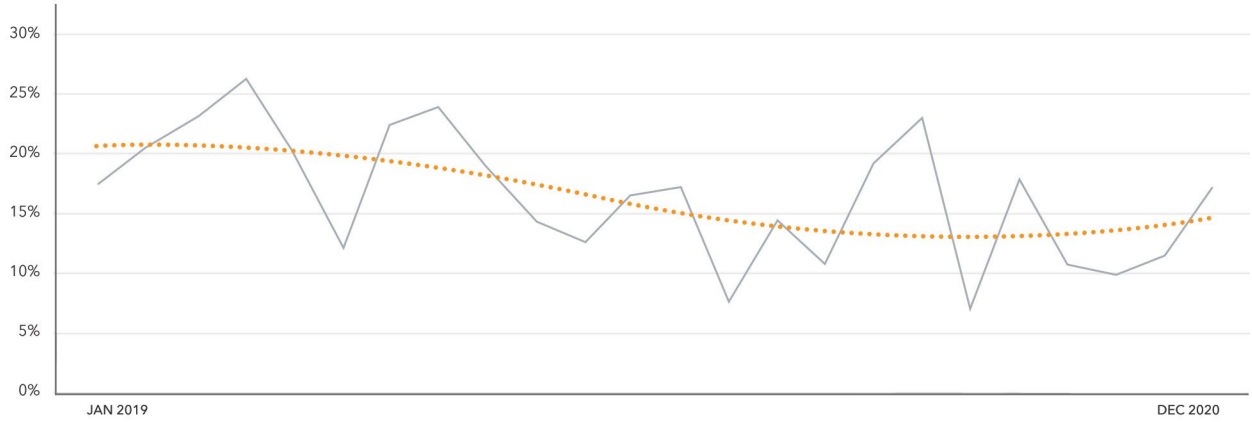
#3 3.30%

Everywhere Tables
by Herman Miller

TOP 10 SPECIFIED (OF 377)

#1	OFS	7.87%	Search Rank #3 // *Previous #13*
#2	Steelcase	7.79%	Search Rank #12 // *Previous #11*
#3	NUCRAFT	6.32%	Search Rank #16 // *Previous #4*
#4	coalesse	6.30%	Search Rank #14 // *Previous #24*
#5	HermanMiller	6.29%	Search Rank #2 // *Previous #1*
#6	NATIONAL	5.02%	Search Rank #59 // *Previous #79*
#7	KI	4.24%	Search Rank #51 // *Previous #65*
#8	HALCON	3.70%	Search Rank #13 // *Previous #17*
#9	ENWORK	3.41%	Search Rank #24 // *Previous #30*
#10	DAVIS	3.26%	Search Rank #1 // *Previous #6*

% CONFERENCE TABLES / TABLES & WORKSPACES



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FURNITURE

Lounge Seating

TOP 3 SPECIFIED (OF 500)

#1 6.96%

MyPlace Lounge Furniture
by KI Furniture

#2 1.36%

Cubic
by OFS Furniture

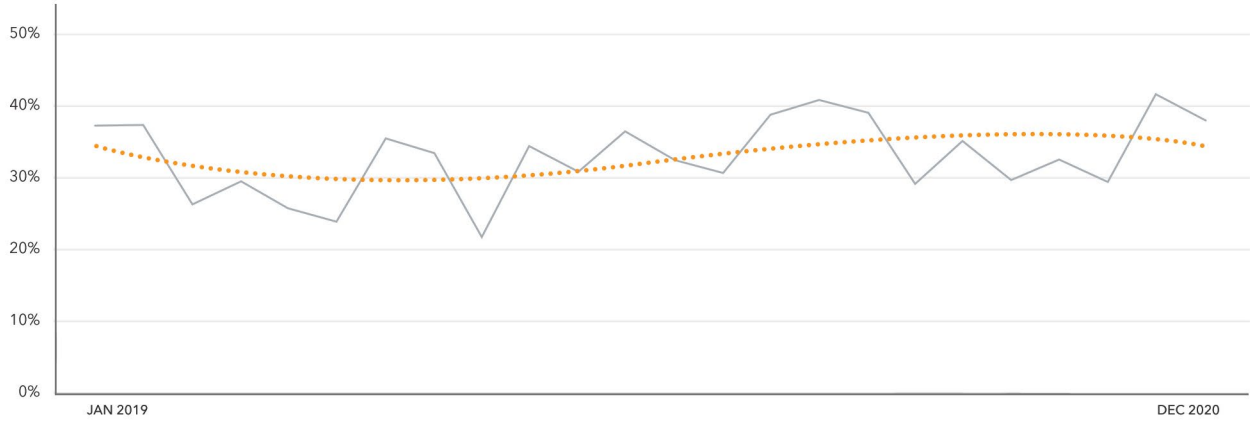
#3 1.25%

Coact - Lounge
by OFS Furniture

TOP 10 SPECIFIED (OF 500)

#1	OFS	6.36%	Search Rank #3 // *Previous #3*
#2	coalesse	5.59%	Search Rank #5 // *Previous #6*
#3	KI	6.32%	Search Rank #25 // *Previous #28*
#4	BERNHARDT design	4.36%	Search Rank #2 // *Previous #2*
#5	arcadia	4.14%	Search Rank #37 // *Previous #61*
#6	turnstone. A Steelcase Brand	2.40%	Search Rank #59 // *Previous #82*
#7	HermanMiller	2.04%	Search Rank #1 // *Previous #5*
#8	HBF	1.87%	Search Rank #7 // *Previous #7*
#9	Hightower	1.80%	Search Rank #9 // *Previous #9*
#10	HAWORTH	1.73%	Search Rank #10 // *Previous #14*

% LOUNGE SEATING / SEATING & CHAIRS



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FURNITURE

Multi-Use Guest Chairs

TOP 3 SPECIFIED (OF 500)

#1 2.60%

Verve
by Stylex Seating

#2 2.40%

Move Chair by Steelcase
by Turnstone

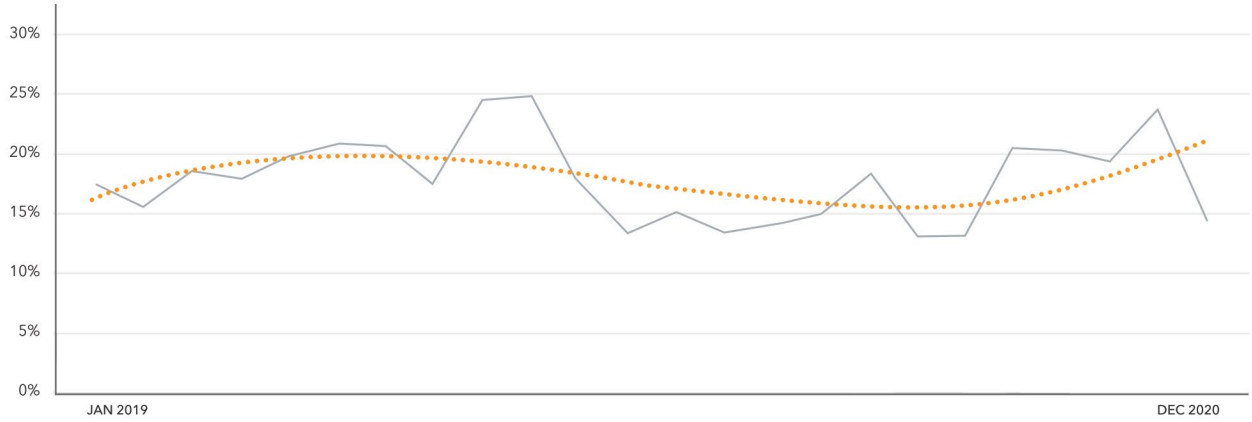
#3 2.15%

Cinque - Cafe/Dining
by OFS Furniture

TOP 10 SPECIFIED (OF 500)

#1	coalesse	6.31%	Search Rank #5 // *Previous #12*
#2	OFS	6.12%	Search Rank #4 // *Previous #14*
#3	Andreu World	5.39%	Search Rank #3 // *Previous #8*
#4	DAVIS	5.11%	Search Rank #2 // *Previous #1*
#5	SitOnIt • Seating	4.47%	Search Rank #9 // *Previous #27*
#6	turnstone. A Steelcase Brand	3.59%	Search Rank #83 // *Previous #87*
#7	HermanMiller	3.51%	Search Rank #1 // *Previous #4*
#8	studio T	3.29%	Search Rank #111 // *Previous #78*
#9	Steelcase	2.98%	Search Rank #12 // *Previous #9*
#10	STYLEX	2.73%	Search Rank #13 // *Previous #15*

% MULTI-USE GUEST CHAIRS / SEATING & CHAIRS



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FURNITURE

Occasional Tables

TOP 3 SPECIFIED (OF 500)

Desks & Tables
by Fleetwood Group Classroom Furniture

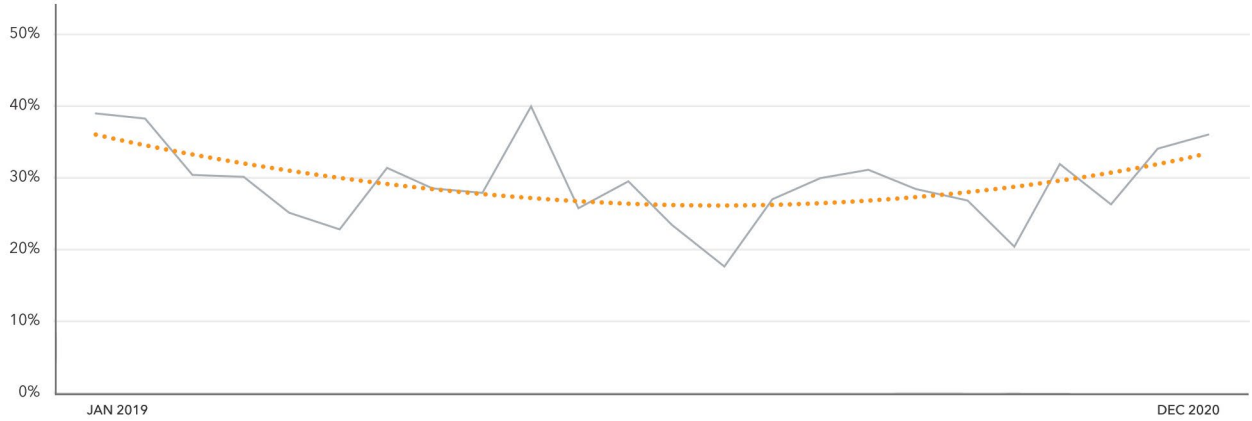
Montara650 Table
by Coalesse

Jive
by Haworth

TOP 10 SPECIFIED (OF 500)

#1	OFS	8.06%	Search Rank #3 // *Previous #12*
#2	west elm	5.05%	Search Rank #48 // *Previous #112*
#3	coalesse	4.70%	Search Rank #4 // *Previous #5*
#4	DAVIS	3.83%	Search Rank #1 // *Previous #1*
#5	BLU DOT	3.77%	Search Rank #19 // *Previous #21*
#6	BERNHARDT design	3.56%	Search Rank #6 // *Previous #7*
#7	HAWORTH	3.44%	Search Rank #34 // *Previous #13*
#8	turnstone A Steelcase Brand	3.24%	Search Rank #37 // *Previous #75*
#9	KI	3.19%	Search Rank #55 // *Previous #101*
#10	CUMBERLAND	2.25%	Search Rank #32 // *Previous #24*

% OCCASIONAL TABLES / TABLES & WORKSPACES



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FURNITURE

Workspaces

TOP 3 SPECIFIED (OF 499)

#1 18.12%

Staks - Workstations
by OFS Furniture

#2 6.11%

Canvas Private Office
by Herman Miller

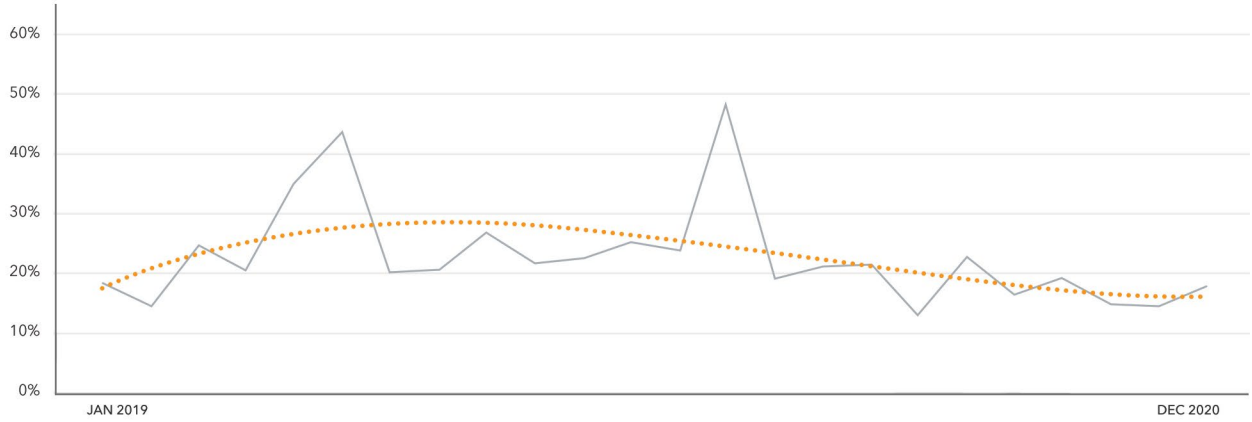
#3 2.91%

Ology Desk
by Steelcase

TOP 10 SPECIFIED (OF 421)

#1	Steelcase	17.90%	Search Rank #3 // *Previous #2*
#2	teknion	13.70%	Search Rank #16 // *Previous #12*
#3	KnollOffice	9.03%	Search Rank #10 // *Previous #5*
#4	HermanMiller	8.47%	Search Rank #2 // *Previous #2*
#5	HAWORTH	6.97%	Search Rank #12 // *Previous #9*
#6	OFS	6.09%	Search Rank #6 // *Previous #8*
#7	NATIONAL	4.47%	Search Rank #28 // *Previous #28*
#8	VIRCO	3.46%	Search Rank #60 // *Previous #86*
#9	KI	2.91%	Search Rank #28 // *Previous #27*
#10	Allsteel	2.16%	Search Rank #24 // *Previous #28*

% WORKSPACES / TABLES & WORKSPACES



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FURNITURE

Work Chairs

TOP 3 SPECIFIED (OF 500)

#1 5.38%

Think
by Steelcase

#2 4.29%

Lumin
by SitOnIt Seating

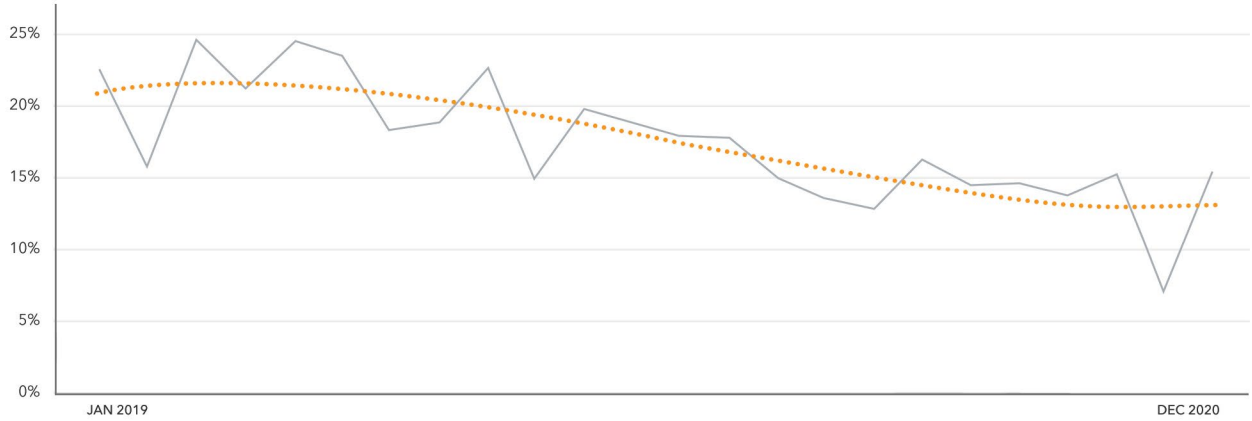
#3 3.83%

Oath Task Chair
by KI Furniture

TOP 10 SPECIFIED (OF 408)

#1	Steelcase	16.75%	Search Rank #2 // *Previous #2*
#2	KI	10.94%	Search Rank #3 // *Previous #5*
#3	SitOnIt • Seating	10.42%	Search Rank #4 // *Previous #21*
#4	HermanMiller	8.93%	Search Rank #1 // *Previous #1*
#5	OFS	4.49%	Search Rank #8 // *Previous #15*
#6	KnollOffice	4.14%	Search Rank #9 // *Previous #8*
#7	Humanscale®	3.42%	Search Rank #34 // *Previous #39*
#8	HAWORTH®	3.03%	Search Rank #25 // *Previous #13*
#9	global	2.32%	Search Rank #90 // *Previous #98*
#10	BERNHARDT | design	2.25%	Search Rank #11 // *Previous #7*

% WORK CHAIRS / SEATING & WORKSPACES



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What is Work?
Thoughts on Returning to the Office

By Joe Starr

Smart, flexible division with screens and partitions

Clockwise from Left: Answer Fence by Steelcase, Universal Screens by Haworth, Agile Wall by Herman Miller, k. screen - Extend by Knoll

Everyone knows the story. In March of 2020, much of the world ground to a halt. Manufacturing stopped, workers were furloughed, employees stayed home, and the collective stocks of the major office furniture manufacturers fell off the proverbial cliff.

To the contrary, companies that were better positioned for the burgeoning home office market were over the moon. Headlines like "Furniture Industry Booms Despite the Pandemic" (NPR), "Furniture Sells Like Hotcakes Online as Lockdown Opens" (Business Today), and "Furniture Industry to Grow Comfortably in 2021" (Nasdaq.com), support the notion that demand was high for sellers of simple desks and affordable task chairs—products requiring minimal assembly that could be ordered easily and shipped out rapidly to individuals newly tasked with working from home.

To be succinct: good times for the likes of Ikea, Wayfair, Amazon, and Office Depot. Not so good for Steelcase, Herman Miller, Haworth, and Knoll.

As Doug Shapiro, VP of Research and Insights at OFS, opined in a recent interview, "If I had been with a firm where the majority of the volume had come from workstations and task chairs, I would have been more concerned."

Definitely time to panic, right?

Not so fast.

Interface Designing for Distance Modular Carpet Tiles
Imply safe distance and create spaces within spaces

There's been much discussion about 'a return to work,' when the truth is we've all been working this whole time."

As with most things that are easily sensationalized and condensed into consumable sound bites, the reality is more complex—the narrative of prosperity for home office and hard luck for commercial furniture is, in fact, somewhat contrived and not entirely accurate.

Yes, there were steep losses throughout 2020, and, yes, there have been intrinsic pressures on the largest of the commercial manufacturers to (re)capture some portion of the home office market, but, there's also a broad understanding that the workplace is neither dead nor dying, that, in spite of the relative success of the great work-from-home experiment that this unprecedented year has thrust upon us, we still want and in fact need to go to work.

The subtleties of language are important in this context. There's been much discussion about "a return to work," when the truth is we've all been working this whole time. As David Wong, VP of Product Development Design & Engineering at Humanscale says, "it would be more accurate to talk about a 'return to meeting' or a 'return to collaboration'."

Armstrong Rest & Refuge LVT
The look of wood with superior durability that stands up to rigorous disinfection

The difference matters because the more we look into the question of how the industry is responding to COVID, the more we see that there's no single answer but rather a nuanced network of contemplation and holistic strategies that point to a rather philosophical question: what is work?

> "For too long, we've spoken of 'going to work,' as if one could just drive to a place and—whoosh!—be magically transported into this abstract mind space that is work."

We may be able to parse what is actually happening at individual firms. And we may see that one company is devoting more resources towards facilitating the online experience, streamlining ordering, and enabling quick shipping of home-friendly products that are easy to install; while another might be emphasizing stop-gap safety measures like space dividers, social distancing protocol, and air filtration; while yet another may be focusing on envisioning the post-pandemic workplace and gearing up product development accordingly.

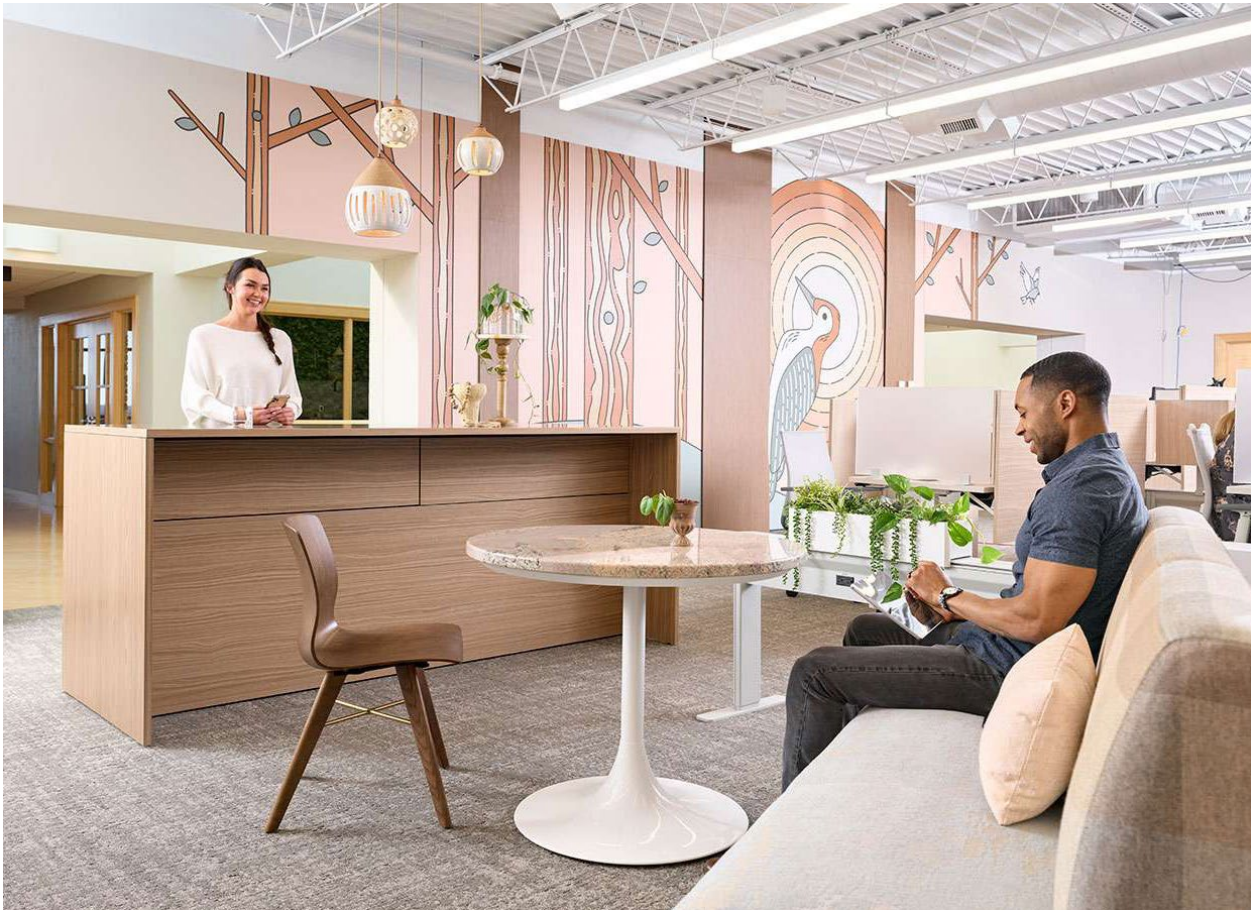
But the commonality we've observed is careful and studied thought—presumably we've all had a lot of time for that—about the very nature of work.

This is why the language we construct around the question is important. On a recent episode of the "imagine a place" podcast, Shapiro interviewed Kelly Bacon, Global Lead for AECOM's Workplace Advisory Practice and co-author of "Future Office: Next Generation Workplace Design." Bacon discusses the ways in which our increased mobility has altered the very idea of work, emphasizing how important it is to look at "the role of place in a world where work can happen anywhere." With the workplace often in flux and no longer confined to a single fixed locale, the relationship between work as a physical space and work as a state of mind becomes more complex. As Shapiro observes, if we're to understand what is required to "get people back to work," we need to push back against the notion that work is a thing, that it's a concrete location with a pre-conceived infrastructure and defined set of expectations.

And, further, that it's the same for everyone. For too long, we've spoken of "going to work," as if one could just drive to a place containing an assortment of desks and chairs and—whoosh!—after walking through the welcoming aperture of parting doors be magically and instantaneously transported into this abstract mind space that is work.

For the more we think about it, the more we see—and of course the pandemic has exemplified this and intensified it—that work is not about place but rather about the psyche. It's about focus and achievement and collegiality and collaboration—all those abstract concepts that coalesce into envisioning an objective and accomplishing it. The office doesn't do that for us, whether it's a carved-out corner with an Ikea desk and slap-dash Zoom background, or a 5,000 sq. ft. suite replete with living moss walls, a thousand-piece gym, and a complimentary selection of farm-to-table cuisine.

Bonds by Teknion
Intuitive distancing via modular elements



Defining space through soft architecture
Agile Workstation, Coact - Lounge, Nineteen20 Table, and Intermix Collaborative Communication Hub, all by OFS

What the office/workspace can do, however, is facilitate that state of mind. Now more than ever, the key to creating spaces that accomplish this is understanding how people work—what inspires them, what creates feelings of camaraderie, what facilitates social connection and focused concentration, what will allow different working styles and divergent schedules, and what supports wellness and health.

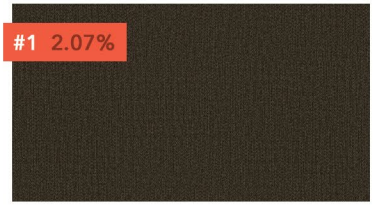
With COVID and the legitimate safety concerns around the workplace, that last question looms large. But we shouldn't make the mistake of thinking that preventing virus transmission is all that matters. In fact, it's just one factor among many that will influence what work looks like.

From what we've observed, commercial office furniture manufacturers know this and are embracing it—were embracing it and promoting it well before the pandemic, in fact—irrespective of size and irrespective of market share. It's this thoughtful approach, this sincere exploration of the nature of work and broad acceptance of different working styles, that will drive the survival of the workplace, determining what it will look like and how it will continue to be a vital component of our lives.

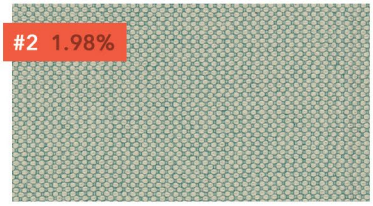
TEXTILES & LEATHER

Upholstery COM

TOP 3 SPECIFIED (OF 500)



ALEA
by Pallas Textiles



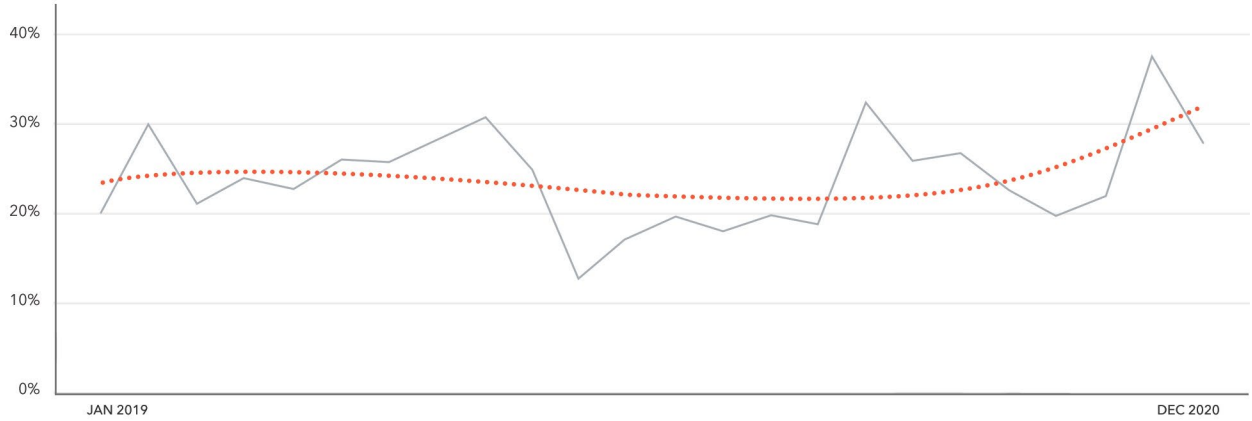
Merit
by Maharam

Meld
by Maharam

TOP 10 SPECIFIED (OF 462)

#1	maharam	14.37%	Search Rank #1 // *Previous #1*
#2	DESIGNTEX	10.41%	Search Rank #2 // *Previous #2*
#3	MOMENTUM TEXTILES	9.16%	Search Rank #4 // *Previous #4*
#4	PALLAS	5.71%	Search Rank #14 // *Previous #10*
#5	cfstinson	5.40%	Search Rank #41 // *Previous #54*
#6	ArcCom	5.36%	Search Rank #16 // *Previous #29*
#7	Carnegie	4.38%	Search Rank #5 // *Previous #3*
#8	KnollTextiles	4.05%	Search Rank #321 // *Previous #366*
#9	Architex®	3.17%	Search Rank #10 // *Previous #6*
#10	BERNHARDT textiles	2.22%	Search Rank #13 // *Previous #26*

% UPHOLSTERY COM / FURNITURE & TEXTILES



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Floored: What 2020 Said About Surfaces Underfoot

By Joe Starr

Designing for Resiliency at Base Camp, Global Headquarters of Interface

An article from The Cleveland Clinic on April 21, 2020 has the subtly ominous and retrospectively humorous title, "Can Coronavirus Live on the Bottoms of Shoes?" In the rosier hindsight of an entire year spent investigating similar concerns, the idea now seems a bit reactionary—taking me back to those four or so months when we all spent hours a week dousing our groceries in Clorox. Even so, the question of what's happening underfoot (with respect to virus transmission) remains salient, especially to those in the business of flooring.

So what of the question posed above? According to samples taken from the shoes of medical staff in Wuhan, the answer is yes, the virus can travel on the soles of shoes. However, given the current common knowledge that the primary mode of infection is through aerosolized droplets, infection through shoes or virus trapped in the floor (or touching any other surface for that matter) is not very likely, according to the CDC; however, the very same organization still says that we shouldn't entirely disregard the notion. So it's understandable that manufacturers and clients alike continue to ponder the issue of hard vs. soft: Which surface is more likely to harbor virus? Which is easier to keep clean? Which is ultimately more amenable to getting employees back to the office? What's hot and what is not?

Not to delve too deeply into a topic that can quickly become an unsolvable conundrum, but here's the quick skinny on hard vs. soft:

- Viruses may remain infectious for twice as long on non-porous surfaces
- Carpets and upholstery may trap viruses deep in fibers, thus keeping them out of contact range
- Absorbent natural fibers may cause the virus to dry up more quickly
- Hard materials are easier to disinfect
- More research is needed on the pros and cons of each

In spite of the above, the popular perception seems to be that hard flooring is the way to go. There's an intuitive sense that hard surfaces are somehow innately cleaner (not really true, in view of the evidence), yet they may be easier *to* clean. Certainly for heavy-use venues like healthcare and education, in which durability, stain resistance, and fall prevention are paramount, hard flooring remains the most viable option. COVID hasn't changed this. As an example, in 2020, Interface experienced new demand for vinyl sheet products—durable and monolithic flooring that has the advantage of no seams, making it less likely that viruses will be trapped (or that people will trip). The company introduced this as a new category in 2021. According to Anna Webb, VP of Marketing and Product Development, "We've amped up resilient offerings, including nora rubber flooring and LVT, but that doesn't mean carpet can't hold… they all contribute to achieving modular, flexible, and integrated solutions."

"There's an intuitive sense that hard surfaces are somehow innately cleaner (not really true, in view of the evidence), yet they may be easier *to* clean."

Though there were interesting spikes in specification patterns for certain resilient flooring products, Design Analytics' data doesn't support the notion that 2020 was the year of resilient. Here's a year-over-year comparison for the top ten flooring categories by number of specifications:

SPEC. % FOR ALL CATEGORIES OF FLOORING

PRODUCT 2019	Specs	Rank	PRODUCT 2020	Specs	Rank Change	Change ABS	Change
Modular Carpet	23.8%	1	Modular Carpet	23.7%	Same	-0.1%	-0.3%
Vinyl Composition Tile	14.5%	2	Vinyl Composition Tile	13.4%	Same	-1.0%	-7.2%
Luxury Vinyl Tile	13.2%	3	Luxury Vinyl Tile	13.2%	Same	0%	0%
Rubber	11.1%	4	Rubber	9.3%	Same	-1.8%	-16.4%
Entry-Walk Off	8.2%	5	Entry-Walk Off	7.7%	Same	-0.5%	-6.4%
Broadloom Carpet	4.3%	6	Broadloom Carpet	4.0%	6 to 7	-0.3%	-7.0%
Hardwood Flooring	3.9%	7	Hardwood Flooring	4.0%	7 to 8	0.1%	0.03%
Heterogeneous Sheets	3.3%	8	Heterogeneous Sheets	2.7%	DNR	-0.6%	-18.0%
Terrazzo Flooring	2.9%	9	Terrazzo Flooring	3.5%	Same	0.6%	21%
Homogeneous Sheets	2.8%	10	Homogeneous Sheets	2.8%	DNR	0%	0%

*DNR = did not rank in top 10 **The products that did not rank in 2019 but did rank in 2020 were Rubber Treads (4.5%, rank 6) and Solid Vinyl Tile (2.8%, rank 10)

Designing for Resiliency with modular carpet from the Open Air collection by Interface

It's hard to pin much down from this, except perhaps to affirm the old saying about the more things change, the more they stay the same… Not too many needles were moved. Modular and broadloom carpet showed very minimal decreases; VCT dropped a percent; LVT remained pretty much exactly the same; and rubber dropped a bit more than one might expect (maybe because of delays in projects linked to education like sports flooring). In fact, the lack of movement here is pretty surprising.

Looking at products targeted to health and wellness as a percentage of all flooring products doesn't tell us much either. Of all 20,460 flooring specifications in the past 12 months, 7.46% of them were in the H/W category, compared to just over 8% for 2019—not much of a change. And looking at the top 10 flooring products overall, 40% of them are products also in the top 10 for H&W, which is pretty much exactly were they were in 2019.

What we have here may be a good old-fashioned draw. At least in terms of specifications, there's no clear winner in 2020 for hard vs. soft, institutional vs. residential, or health/wellness as a percentage of all flooring. Given the tumult of 2020, we might view this as an auspicious balancing act. The data echoes Webb's assertion of how the categories tend to be self-sustaining, how intrinsic qualities in each lend themselves to naturally adapt to challenges presented by COVID.

"What we have here may be a good old-fashioned draw. At least in terms of specifications, there's no clear winner in 2020 for hard vs. soft, institutional vs. residential, or health/wellness as a percentage of all flooring."

Modular carpet provides a nice example. For many years now, companies like Tarkett and Interface have developed and refined carpet tiles. In 2018, Tarkett's Tailored Twist introduced the idea of base patterns and "edge embellishments"—offering different dimensions of tiles and planks with distinct yet coordinating designs. One might use the more colorful planks to highlight a particular space or subtly imply direction for wayfinding.

The concept becomes even more propitious in the age of COVID. In the early days of the pandemic, Interface shared best practices for its "Designing for Distance" strategy using modular flooring to define space and help occupants maintain safe distance. As firms begin bringing people back to the office, this concept has evolved into "Designing for Resiliency," an approach that uses the inherent flexibility of carpet tile and LVT to integrate long-term solutions that can adapt to changing circumstances.

With Designing for Resiliency, complementary and contrasting colors may be used for overt demarcation of different zones, direction of traffic flow, and for a subtle suggestion of appropriate distance. Says Webb, "Our modular flooring products are intentionally designed to work together, and they have the advantage of built-in mathematics, which provides an easy measuring tool… color variations, banding, and pattern can be integrated as visual cues to help keep us safe without compromising on design."

"This inter-relationship between soft and hard elements is also an important facet of resiliency, as it enables a variety of textures and patterns to please the senses and help create a more dynamic space."

Designing for Resiliency can also include the integration of biophilic elements to create nature-inspired spaces, which are proven to support physical and emotional wellbeing—crucial elements for employee satisfaction and long-term retention. Interface's Open Air line offers geometric, linear, organic, and textured patterns in a variety of neutral colors. The collection includes four styles that feature Interface's i2 design methodology, a nature-based approach with differing patterns and color variations within one style and colorway. Nor is this flexible approach limited to soft flooring.

The company's Brushed Lines LVT collection offers the same modularity as carpet tiles. As seen in the image below, the products can work together in order to achieve social distancing needs and to demarcate different zones of activity. This inter-relationship between soft and hard elements is also an important facet of resiliency, as it enables a variety of textures and patterns to please the senses and help create a more dynamic space.

Brushed Lines LVT and Tokyo Twist Modular Carpet by Interface

As modular carpet proved adaptable to the needs of the moment, so too did resilient sheet. Armstrong experienced this product's versatility firsthand, when they were contracted to provide flooring in two emergency hospitals in Wuhan at the dawn of the pandemic—facilities that needed to be built within ten days. Vinyl sheet provided the ideal fit as its monolithic nature and intrinsic infection control recommends it to healthcare settings. Nor did it hurt that Armstrong's manufacturing facility is in Wujiang, providing decent proximity to Wuhan.

Medinpure Vinyl Sheet by Armstrong Flooring

Exchange LVT with Diamond 10 Technology by Armstrong Flooring

Vinyl sheet has always been available to the residential market, yet the increase in modular offerings in recent years has eroded its market share within this segment. Julie Eno, Armstrong's Director of Commercial Marketing, notes that it's a product with significantly more growth potential: "While resilient sheet has always had a place on the commercial side, clean-ability concerns and a drastic improvement in visuals have led to increased potential on the residential side." This improved aesthetic is seen in Armstrong's suite of vinyl sheet products geared for residential, with natural wood and stone designs approaching a new level of realism.

Nor does it hurt that Armstrong made advances in infection control and durability back in 2016 with Diamond 10 Technology. A coating made with cultured diamonds, Diamond 10 enhances performance, decreases maintenance demands, and increases clean-ability. While it was originally developed with LVT in mind, Diamond 10 may be incorporated into many varieties of resilient sheet flooring, which will likely increase demand for these products—in both commercial and residential settings—as infection control remains at the center of our awareness.

"Vinyl sheet has always been available to the residential market, yet the increase in modular offerings in recent years has eroded its market share within this segment."

Early in our conversation, Eno remarked that back in March of 2020 so much was unknown, with projects being canceled to the left and postponed to the right. But if we consider Armstrong's rapid reaction to the need for healthcare flooring as an allegory for the industry response as a whole, we can perceive how abrupt disruption can help trigger advancement. We see this in the way Interface capitalized on the intrinsic qualities of modular carpet, as well as in the growth of resilient sheet. As Eno says, "This industry has always been one of adaptation and evolution. This is another exciting opportunity to embrace a challenge and be at the forefront of flooring innovation."

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