

FLOORING THIS FALL · FROM BROWSING TO BUILDING

Fall isn't showing up.

Four steps of a flooring purchase, and the latest read on each.

01 LOOKING

3.5%

of Home Depot site visitors looked at flooring pages in September, about where it was a year ago (3.4%).

CARBON ARC CLICKSTREAM - CA0030

02 SAMPLING

0%

change in flooring sample orders from early August into September. The last two years: +13% and +17%.

CARBON ARC DISTRIBUTOR FLOORING - CA0088

03 BUYING

-4%

Floor & Decor card transactions over the last four weeks vs a year ago. The average ticket held at \$384.

CARBON ARC CREDIT CARD - US COMPLETE PANEL - CA0056

04 BUILDING

50%

remodels' share of remodel and new-construction permits so far in 2026, after slipping to 49% in 2025 from 52% in 2024.

CARBON ARC HOUSING PERMITS - CA002

“It’s soft, for sure soft. You can argue it’s stable, but soft.”

C-SUITE, FLOORING SUPPLIER, NORTH AMERICA · SEPTEMBER

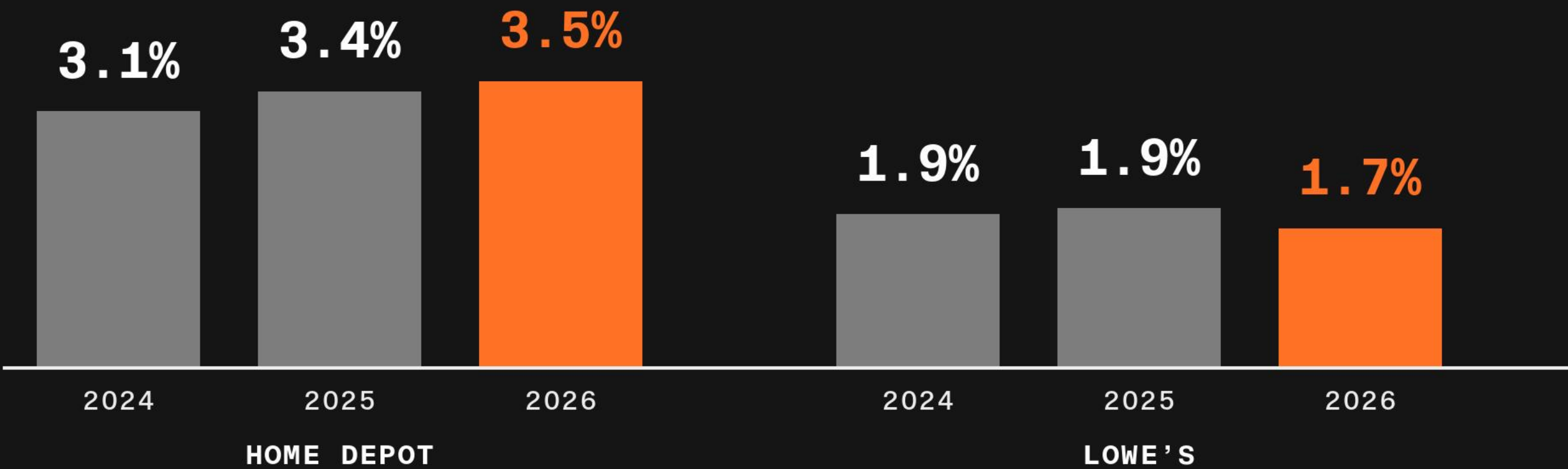
Carbon Arc Transcripts ID: f23110f8-6d49-4f92-b53c-711dcf3d8653

Last 4 weeks = Aug 31 to Sep 27, 2026, vs the same weeks of 2025. Permits: January to August each year, each permit counted once, in ZIP codes with filings every year since 2019.
Source: Carbon Arc Transcripts, plus the asset named under each figure

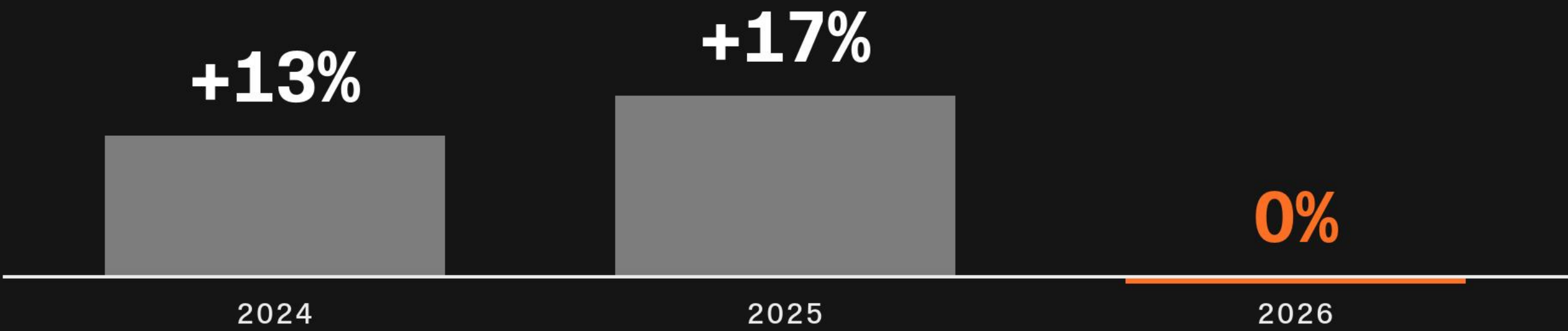
01 LOOKING · 02 SAMPLING

Shoppers are browsing
but samples stalled

SHARE OF SITE VISITORS WHO VIEWED FLOORING PAGES, SEPTEMBER



FLOORING SAMPLE ORDERS, EARLY AUGUST → SEPTEMBER



“And then the last month, it just has gotten real sluggish again.”

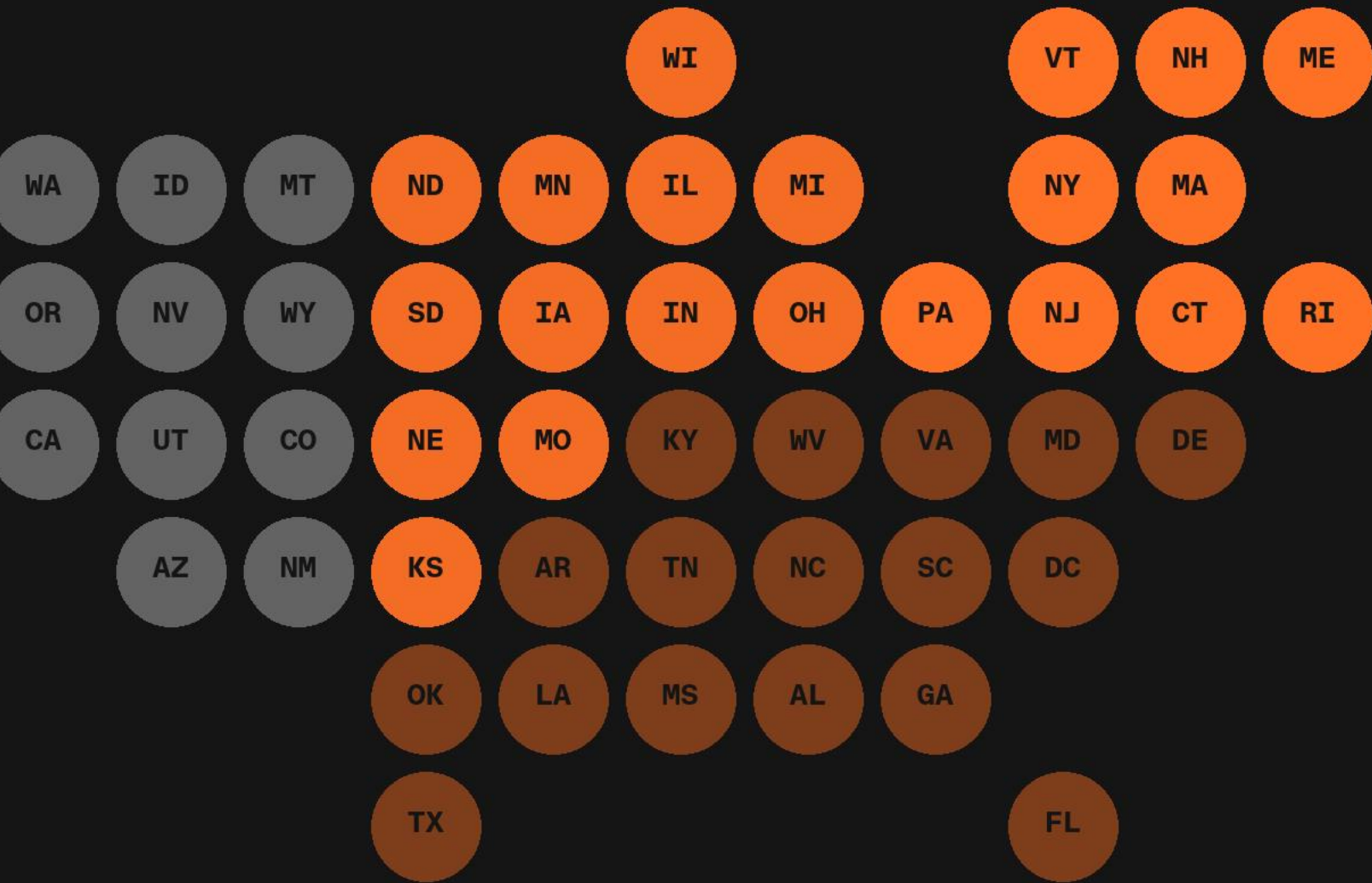
C-SUITE, FLOORING MANUFACTURER, NORTH AMERICA · SEPTEMBER
Carbon Arc Transcripts ID: 5218af36-8e5f-4db3-b108-9aeffb090c2b

Flooring pages: page paths containing “flooring”, share of each site’s US visitors, Sep 1 to 28 each year. Sample orders: first 4 weeks of Aug vs next 4; counting individual samples, 2026 is +7%.
Source: Carbon Arc Clickstream - CA0030 · Carbon Arc Distributor Flooring - CA0088 · Carbon Arc Transcripts

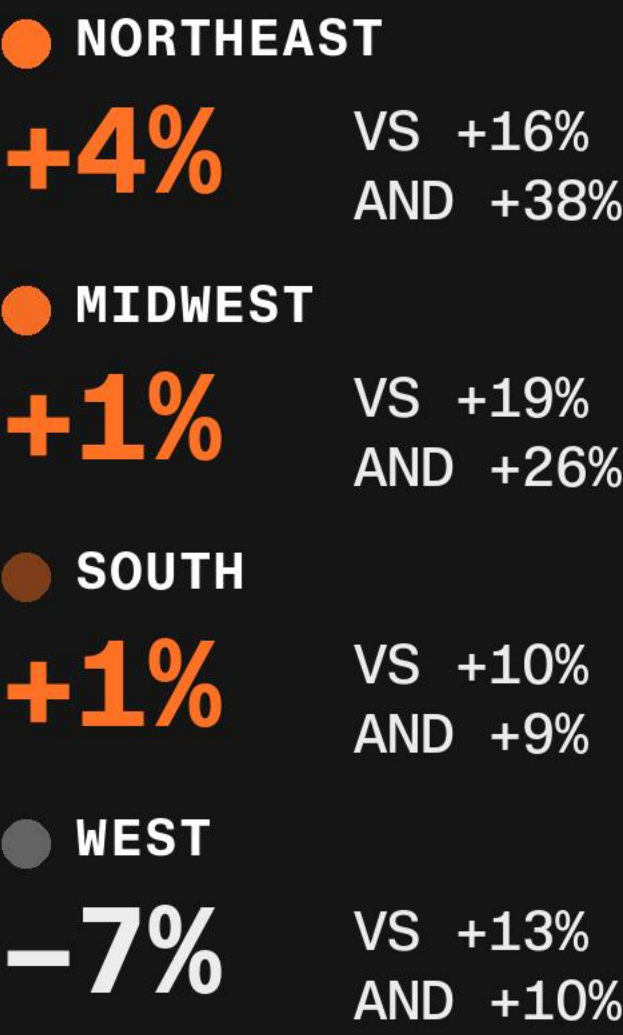
02 SAMPLING · CALLING THE REGIONS

Fall is running late
almost everywhere.

SAMPLE ORDERS, EARLY AUGUST INTO SEPTEMBER



2026 VS 2024 AND 2025



FROM CARBON ARC TRANSCRIPTS

EAST COAST RETAILER
“It’s strengthening, which is really odd.”
Carbon Arc Transcripts ID: 5c83d770-b0b5-405a-a83f-3e364630bc22

SOUTHERN RETAILER
“Summer was a little bit softer than I had expected.”
Carbon Arc Transcripts ID: 77edb8de-a15c-4a39-a3de-2686053417f1

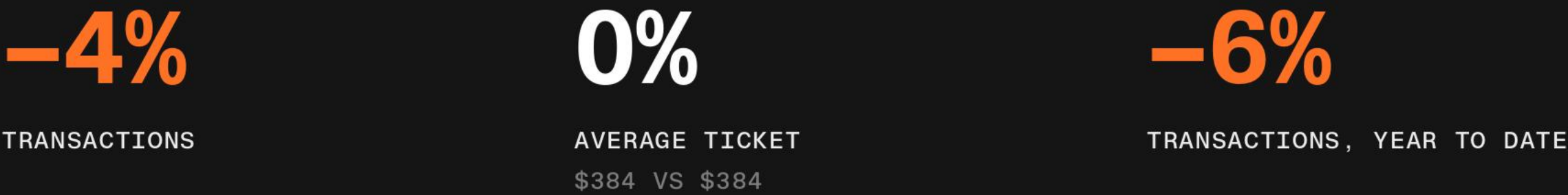
WEST COAST DISTRIBUTOR
“September has gone the other direction.”
Carbon Arc Transcripts ID: 6557471c-22a4-4935-b60b-ce2892d06cd5

Sample orders in a national online flooring panel, first 4 weeks of Aug vs next 4. States shaded by Census region. Grey: the West has fewer orders but more samples in each.
Source: Carbon Arc Transcripts · Carbon Arc Distributor Flooring - CA0088

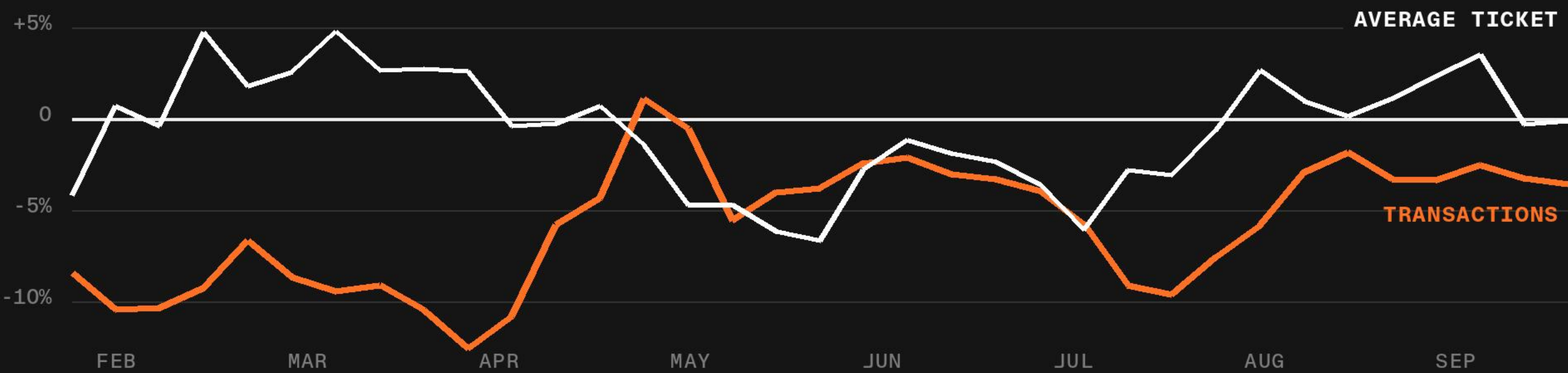
03 BUYING · CARD TRANSACTIONS

Fewer trips to the register.

FLOOR & DECOR · LAST 4 WEEKS VS A YEAR AGO



FLOOR & DECOR, 4-WEEK ROLLING CHANGE VS A YEAR AGO, 2026



THE BIG BOXES, WHOLE STORE · LAST 4 WEEKS VS A YEAR AGO



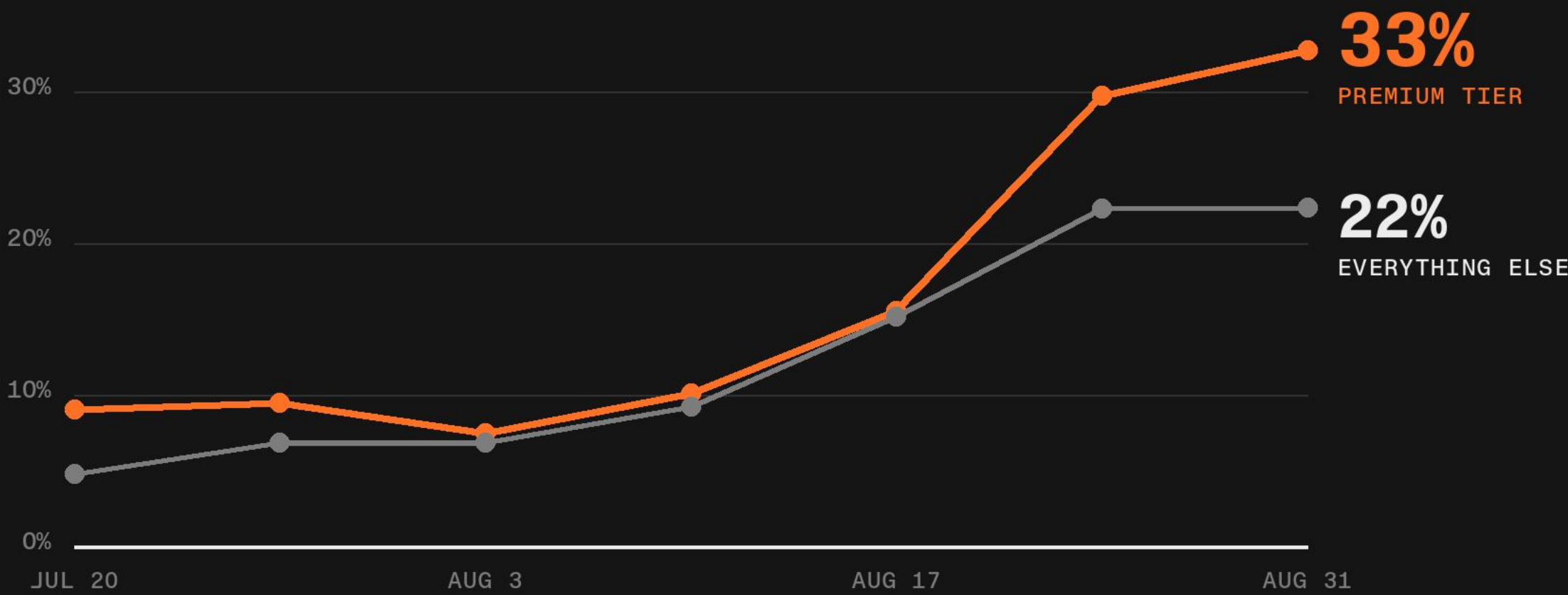
“rather than doing an entire home, people are doing rooms or floors in a home”

C-SUITE, FLOORING MANUFACTURER, US · SEPTEMBER
Carbon Arc Transcripts ID: a8c0975f-9d7f-4945-8c3c-406d0de706d0

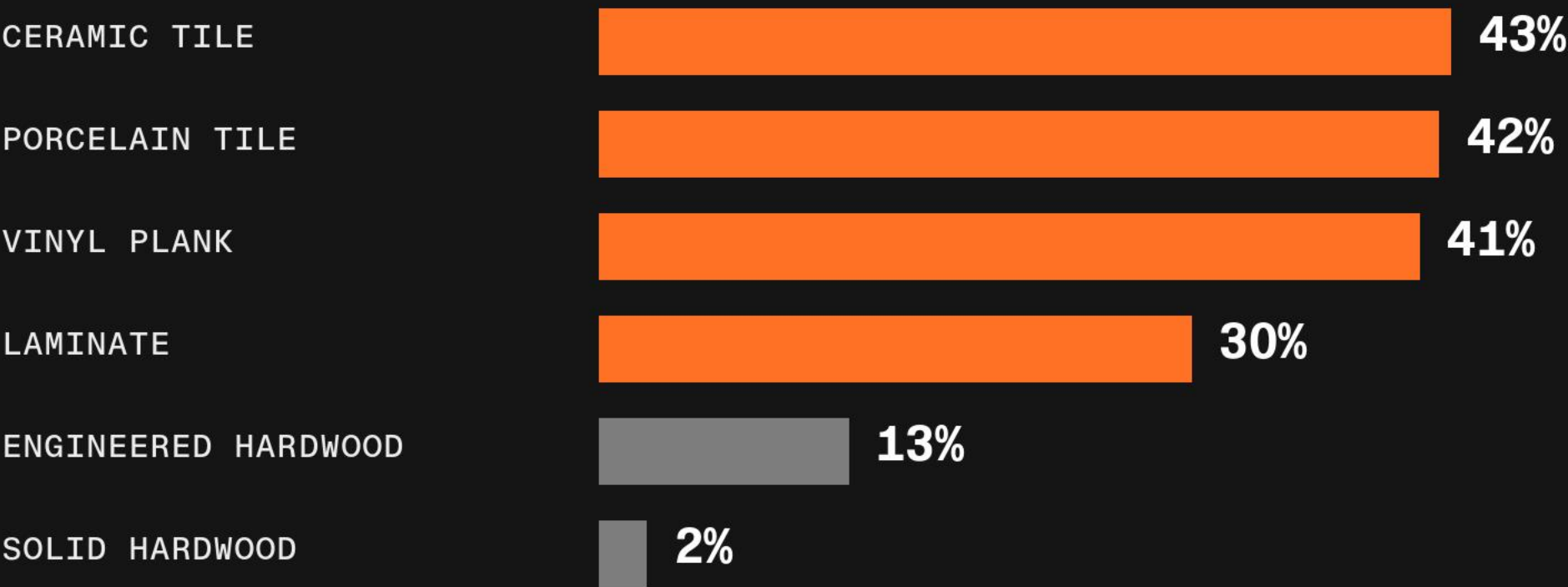
PRICING · HOME DEPOT SHELF, PREMIUM TIER

Premium floors went on sale.

SHARE OF THE SAME FLOORING PRODUCTS MARKED DOWN, WEEK BY WEEK



PREMIUM TIER ON MARKDOWN, WEEK OF AUG 31, BY FLOOR TYPE



“suggestive that we’ll see deflationary pricing in the very near future”

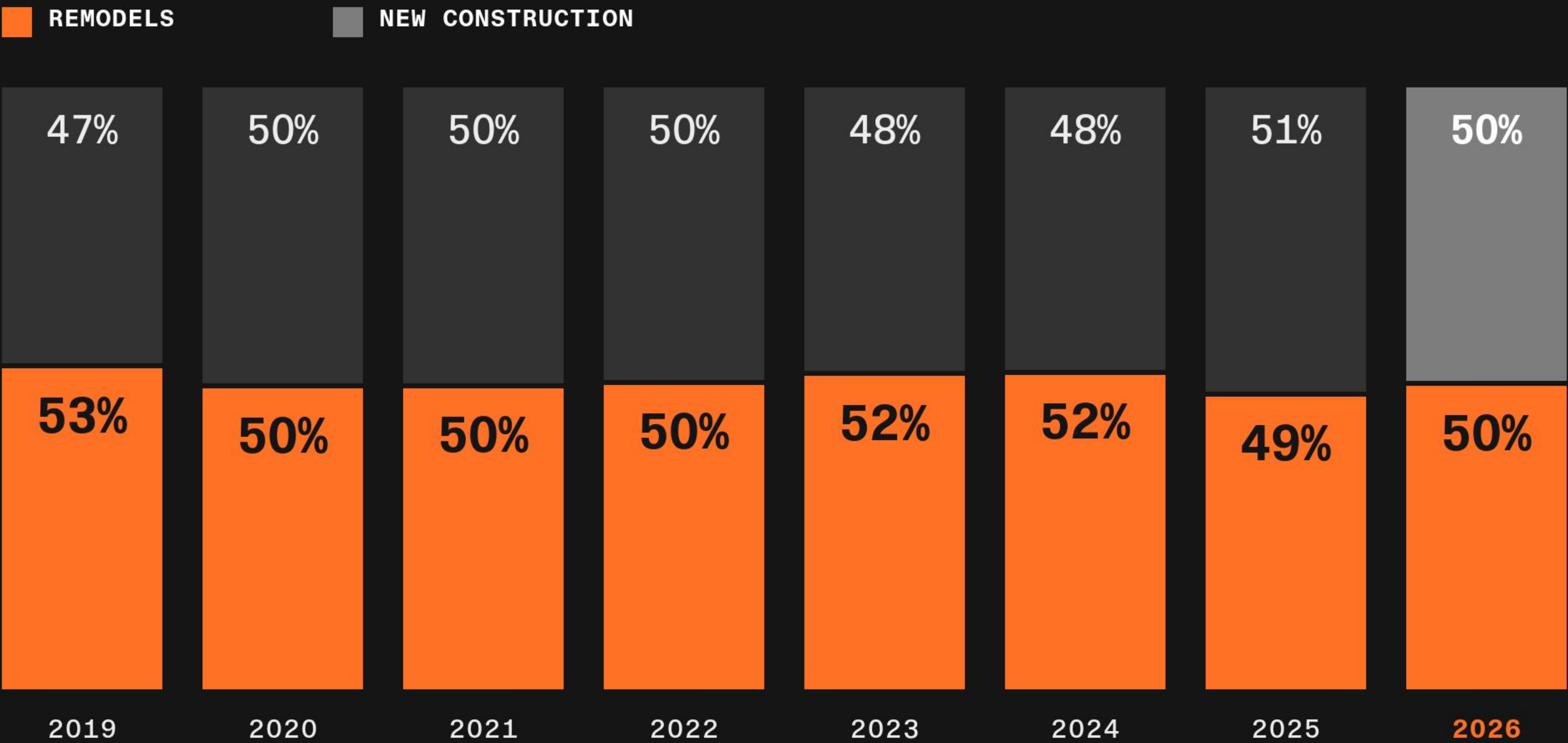
C-SUITE, FLOORING MANUFACTURER, US · SEPTEMBER
Carbon Arc Transcripts ID: a8c0975f-9d7f-4945-8c3c-406d0de706d0

Same products tracked Jul 20 to Sep 3, 2026, 312 premium and 984 others. Premium = top quarter of list price within each floor type. Includes Labor Day sales; no prior-year scrape to compare.
Source: Carbon Arc Home Depot - CA0089_6 · Carbon Arc Transcripts

04 BUILDING · RESIDENTIAL PERMITS

Remodels stopped
losing ground

SHARE OF REMODEL AND NEW-CONSTRUCTION PERMITS, JANUARY TO AUGUST



New homes took share in 2025. Through August this year, remodels have won a little of it back, in all four regions.

“they’ve had us quote whole houses and then we end up doing two bedrooms”

FLOORING RETAILER, US SOUTH · SEPTEMBER
Carbon Arc Transcripts ID: 77edb8de-a15c-4a39-a3de-2686053417f1

Each permit sorted by the city or county’s own permit type (new vs alteration, remodel or addition), which keeps 2026 comparable. Each permit counted once, in 3,117 ZIP codes with filings every year since 2019. Data through August 2026.
Source: Carbon Arc Housing Permits - CA002 · Carbon Arc Transcripts

FROM BROWSING TO BUILDING · THE FULL PICTURE

Carbon Arc provides
the full story.

From site traffic and sample orders to card spend, shelf prices and building permits, the Carbon Arc platform brings 300+ data assets together with Carbon Arc Transcripts. The numbers show what's happening, and the operators tell you why.

CARBON ARC TRANSCRIPTS

25 flooring interviews since July, and counting. Many of the same operators come back month after month, so the record gets deeper with every call.

TO GET THE FULL INTERVIEWS FROM TRANSCRIPTS,
REACH OUT TO support@carbonarc.co