



Each new season brings fresh ideas to the home furnishings business. As consumer tastes and lifestyles shift with the ever-changing tenor of our times, our industry responds with products that redefine the home; services that renew our relationships with our customers; and whole new ways of doing business that reshape the retail landscape.

As the premier Market for world premieres, the High Point Market is always working to keep you on top of the trends that affect your business. In preparation for our Spring 2008 event, we spoke with trend-trackers, manufacturers, retailers and industry experts to uncover the ideas that are setting the course for our industry. Their thoughts, predictions, insights and inspirations have been collected for you in this report.

To see the future of home furnishings take form, be sure to join us at the world's home for home furnishings, from April 7 - 13, for the Spring 2008 edition of the High Point Market. Our more than 2,000 exhibitors; full schedule of educational seminars; and complete calendar of social and networking events are sure to put you in touch with the products, people, information and ideas you need to make this season your season of renewal.

Best Regards,

Bi S. Cam

Brian D. Casey



Hearing the word "trends" usually causes our thoughts to turn to fashion, to the sensual elements of products, such as color, pattern, texture and form. As our customers' choices are often driven by new design ideas, and decorating considerations are an integral part of a home furnishings purchase, these are certainly important considerations. A retailer has to know what looks and feels his or her customers want to create.

Trends, however, involve more than just style. Trends arise out of people's lives and their experiences influence much more than just color and design preferences. They also influence the ways in which your customers want to shop; the expectations they have of you; how they spend their money; and the new experiences they landscape begins by considering your customers' lives, the services they desire and the experiences they seek.

Pantone® 2009 Color FORECAST

Amber Gold	
Desert Sand	
Very Grape	
Wineberry	
Port Royale	
Cowhide	
Blue Ice	

Current Consumer MINDSET



When customers come through your door, they bring a whole host of concerns, ideas and inspirations with them. Making the most of every potential sale begins with understanding these mindsets. As they prepare their home furnishings forecasts, our trend-tracking experts begin by reviewing current consumer needs and desires, and while they find that many do translate into definable design themes, there are others that can't be satisfied with styles and colors alone. Now, perhaps more than ever, combining products, services and expertise to create a compelling experience is the key to growing your sales.

"In a world of abundance, products and services have become commoditized," says Susan Schultz, who teams with Deb Barrett to produce the home furnishings forecast for Grace McNamara Publications, Inc., publisher of the design-trade magazine, *Window Fashions*. "Companies can break away from this by building experiences, which differ from services in that they invite active participation, engage all the senses, are dynamically personal and memorable.

"Today's consumer is fueled by a need for novelty, self-worth, validation and control. As the unexpected becomes ordinary and what used to be out of reach is now close at hand, many consumers are obsessed with finding the 'next hot thing' in almost every category, no matter the price. It could be a great, previously undiscovered restaurant; the perfect hairstylist; the best red wines under \$15; or a dazzling accention piece that brings new life to their living rooms.

"It's important to remember that there can be more pleasure in the process—the research, shopping and preparation—than there is in the actual product. The goal is to add 'experience value' to every aspect of your interactions with your customers. Build connections that make the cost of the product less important than the new set of intangibles you have created."

Intangibles are, by nature, difficult to define. One example of the difference between a commodity and an experience is found by comparing two fast food providers. If you go to McDonalds and order a Big Mac, you're going to get two all beef patties, special sauce, lettuce cheese, pickles, and onions on a sesame seed bun. Good luck if you want a slice of tomato. Though only available at McDonalds, a Big Mac is a commodity. Thus, it competes on price.

If, however, you head to Starbucks for a latte, you'll find a completely different model at work. You can choose from a wide variety of regular or decaffeinated coffees, or even a half-caff blend; add any combination of more than a dozen flavored syrups; skim milk, whole milk, half & half or cream; white sugar, raw sugar or two types of artificial sweetener; and there are a few other choices, as well. In all, Starbucks has more than 2,000 ways to make your latte. Plus, you participate with your barista in the creation of your beverage. If the store isn't too busy, you can walk up to the counter and say, "I'm not quite sure what I want, maybe something rich, creamy, not too sweet and a little fruity." Responding to your request, the barista will make suggestions and guide you through the process of creating just the right brew for your right now

Starbucks sells an experience, and that experience is what allows the company to command a premium price. In many ways this difference between selling commodities and creating experiences begins with a subtle, but significant shift from telling your customers "you want what I have" to saying "I have what you want."

Drawing on his experiences decorating some of America's finest homes, world-class designer Barclay Butera, who is also the chief executive officer of furnishings manufacturer Barclay Butera Home, agrees that involving the customer is critical to creating a great experience. "My inspirations come from a multitude of sources," says Butera, "from fashion; from my travels to places as diverse as Paris, New York and Venice Beach; as well as from cinema, theater and literature. Inspiration can come from just about anywhere. Transforming that inspiration into a look, I work to create a sense of time and place, and to tell a story. But once you start working with an individual client, you have to tailor your inspirations to their interests. The client should be the theme."

Butera maintains this commitment to involving his customers even when he's selling to the retail trade. "High Point is my runway, my fashion show," he says. "I'm always working to out-do what I did last season; and to stay ahead of the trends I take my share of risks. But you should think of what you see in my showroom as a palette, rather than a 'total look' that you have to embrace in full. Take the elements that you love and make them yours. It's always important to be passionate about what you're selling, because passion is contagious."



As she attended this year's National Retail Federation conference, retail design expert Connie Post uncovered a few other elements of experience creation in the "Global Powers of Retailing" presentation by research and consulting firm Deloitte & Touche. "You have to start thinking in terms of extreme service," Post relates, "of going beyond the bounds to deliver a human touch that the big-box, low-price, product-commodity stores just can't match. One example of this in the home furnishings business is retailer Robb & Stuckey, which puts designers on the retail floor. It allows customers to get their design advice in the same place that they buy their furniture, adding value not just by simplifying the process, but by making it more fun, more relationship-oriented and by providing expertise that gives people more confidence in their choices. Another is City Furniture, whose seven-day-a-week same-day delivery service gives them a big edge on their competitors."

Keith Koenig, CEO of City Furniture, explains how the program works, "On any day of the week, if a customer orders their furniture by three o'clock in the afternoon, we have it in their home by the end of the day. We started this program in 2002 and began marketing it in our TV and print ads in 2003. Delivering this high level of service requires a combination of technology and teamwork. Having the inventory on hand is a big challenge, but that's just the start. You have to have seamless coordination of your sales and warehousing functions, and the warehouse and delivery teams have to be able to execute quickly and accurately. In all, it requires a substantial investment in computer systems, people and training. But it's an investment that pays off. Sameday delivery has been a huge hit for our organization."

where there is a discernible focus on social responsibility. In such cases, retailers can actually increase their profit margins by engaging in such a focus— while at the same time performing a service."

Another trend in consumer mindsets identified by Schultz and Barrett is one they call Generation C. "The 'C' stands for Create + Curate, Content + Communities," says Barrett, "and moving forward, we've added Conscience. Create acknowledges the consumer as co-creator. Companies immersed in Generation C are tapping into the intelligence, tastes and inspirations of their customers to give them a direct say in what actually gets designed, developed, manufactured and serviced."

"There are four factors driving this trend," continues Barrett. "First, the need to be creative has exploded in our culture. People want to express themselves as never before."

"A home has to be livable," asserts Butera. "That's a guiding principle behind all of my designs. However, 'livable' is ultimately defined by the person who inhabits the space—your client or customer. So, while people seek me out because they want my expertise, vision and creativity, I have to be aware that they also want to put their own signature on their homes. A successful design engagement always has a 'yours, mine and ours' quality to it."

"At the same time as the consumer's desire to be creative has increased, an explosion of tools that assist us in creating content has unleashed that creativity," Schultz notes. In home furnishings, one example might be a fairly inexpensive piece of interior design software that allows an individual to plan out a room before she ever starts shopping. There are

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- Deb Barrett, Schultz and Barrett

"Deloitte also suggested that retailers fight commoditization by creating differentiated store formats, shopping experiences and product selections," continues Post. "For me, this translates into what I call Retail Theater: a store environment that goes beyond just a presentation of products to creating a fun and engaging place to spend your time.

"A third point that's applicable to home furnishings is that retailers are becoming world-class marketers. While there may have been a time when you could just pick a good location and excel on selling skills alone, those days are gone."

According to the Deloitte report (available online on the Retail page of www.deloitte.com), "Today, some of the world's top retailers are aggressively hiring top marketers away from [consumer goods manufacturing] companies. Their goal is to become marketing powerhouses, to build strong brand identity in order to compete with other retailers and, increasingly, to compete with branded suppliers through private label sales."

"Finally," concludes Post, "the other big intangible is social responsibility. Consumers care about how you treat your workers, product safety and environmental sustainability. Identifying your store with causes that are important to your customers can have a huge impact on your future brand equity." In addition, the Deloitte report notes "some consumers appear to be willing to pay a price premium for products or services

even free tools available on line. Just Google 'on line room design' and you'll find a link to the Arrange-a-Room page of the *Better Homes and Gardens* web site. It isn't very sophisticated software, but it's a much easier and quicker way to put a room plan together than a pencil, ruler and piece of paper ever were. As this technology progresses, retailers and manufacturers have a great opportunity to become co-creators with their customers

"This gets to another, internal driver of the Generation C trend," says Schultz, "the deeply rooted and intertwined desires of vanity and control. The room design your customer creates is uniquely and personally hers, reflecting her needs, tastes and desires. Plus, she controls the entire shopping process, rather than being bound by your store's hours of operation or the expertise of the salesperson that happened to be working when she came in to shop."

"Our research confirms that today's consumer is the most knowledgeable shopper in history," relates Jane Matteson, executive director of the American Society of Furniture Designers. "She's astute, on top of her game and tuned in aesthetically. I'd also add that she's not 'buying from the book,' as we used to say. She is no longer embracing an entire look or style, but is making elemental choices about what she brings into her home. She's looking for strong, powerful, individual pieces that make each room come alive.







"You don't have to spend a lot of money to make a strong statement; you just have to tap into the power of design. Find 'statement' pieces, ones that really stand out, and then set up your vignettes to highlight those pieces. Use contrasts of neutral backgrounds and brightly colored accents to create room scenes that pop. Bring in bold patterns. Case goods and accessories that have dramatic finishes, such as dry ash, are very appealing right now, and we're seeing a return of sleek, clean, chrome and glass designs, as well. But remember, there are no canned formulas. This customer is choosing signature pieces that will define the room and then adding the supporting elements to make that showpiece sing. That's what your merchandising has to do, as well."

"What makes this content creation phenomenon possible is the information transparency provided by today's technology," Schultz continues. "We can easily find the products we want and the stores that sell them, compare prices and even gain an understanding of how they're made. Plus, we can share our opinions and findings with others who love what we love. Companies that facilitate this activity will enjoy a huge advantage over those that don't, and the good news is that achieving this advantage gets easier every day." As retailers consider where their websites should go next, this trend indicates that creating online design tools and web-based communities could pay big dividends.

"Conscience is the new component to Generation C," adds Barrett. "In our industry, we've seen it most strongly expressed in the sustainability movement, but there is more to social responsibility than just offering environmentally friendly products. Philanthropy is hot, and the key to making it work for you lies in finding and supporting those causes that are important to your customers."

Effectively appealing to your customers' consciences doesn't have to be limited to making cash contributions, nor is it confined to support for big global causes. As a retailer, Barclay Butera makes a point of supporting the schools in communities surrounding his stores, and also makes his showrooms available as venues for various local charity events. "We want to benefit our immediate neighborhood," says Butera, "and to give people a place to come together. It's not about the short-term payback. You have to think long term, about finding ways to be the place that people think of when they start considering a furniture purchase, not about using a charitable event as an excuse to make a sale."



"A third important consumer mindset is one that we call The Economy of Design," continues Schultz. "As goods and services become commodities, design delivers a distinct advantage by blending utility and significance. 'Utility' means that the product or service must work, and this quality is abundant today. We have more products and services than we can handle and most of them function just fine. To stand out, sellers must make a dramatic leap beyond utility, competing not just on left-brain attributes like price and function, but also on right-brain qualities such as look and feel, emotion and meaning.

"It isn't about design versus utility or emotion over function, either. On so many levels, improved design creates an improved experience, and it's the experience that makes the difference. Combining this thought with the creativity and content-creating tools from Generation C, you get that everybody wants to be a designer and you realize that to connect with your customer, you have to start thinking like a designer, too."

"Our final consumer mindset," says Barrett, "is called Multiple Personalities. Today, who we are often depends on where we are and what we're doing. We're one person at work, another at home, yet another when we're visiting our families and still another when we're hanging out with friends. In perhaps the most extreme example of this phenomenon, we see people creating entire personalities in on-line communities such as Second Life, personalities that may or may not reflect any of their real-world personas.

"This has created an explosion of niche markets at retail. As people seek to give expression to the various and varied aspects of who they are, they seek a much wider variety of product types and styles. It's not unusual today to find someone putting ultra-contemporary furniture in their living room while their bedroom oozes Old World opulence and sumptuous luxury. So it's important to remember that the person who bought an 18th Century reproduction dining table yesterday may be looking to create a funky Mid-Century Modern family room tomorrow. Success in this new world of niches requires confidence, boldness and risk-taking. You have to be willing to leave some of your old mass market behind as you shape yourself to fit the nooks and crannies that are best suited to your future growth."

the worlds of fashion and youth culture for a quarter of a century. As she prepares to re-launch her consumer website, www.thehome.com, with broader, deeper and up-to-the-minute trend information, she sees this movement toward greater individuality as a major influence.

"We have said for a number of years that there is a look for everyone," Gefen relates, "not one look with a universal appeal, but the look for you, the individual. Understanding that not all styles or shapes flatter every woman's form, fashion designers have developed looks that work for all body types. That way of thinking has made its way into the home, where people are not buying suites of furniture, but pieces that work for them, fit their style and enhance their lives as they choose to

At the intersection of these current consumer mindsets, whole new retail models are being created. Carol Gregg, president and chief designer of furniture maker Red Egg, is doing brisk business with a new type of furniture merchant, the designer/retailer.

"It used to be that if a designer had a storefront, it was mostly just a place to park her inventory and keep her office while she pursued her next design engagement," Gregg describes. "The designer/retailer, however, is running a boutique lifestyle shop that carries not just home furnishings, but also gift and personal items such as candles, fragrance and accessories. Everything expresses the designer's unique point of view, offering the customer a hand-selected assortment of products that just can't be found in the mass retail world."

"The range of products offered and the unique, hand-chosen nature of each item allows the customer complete freedom of expression. She may decide that she likes the whole look and hire the designer to redecorate her living room. Or, she may fall in love with a single item like a buffet or a daybed and buy that as a showpiece. Or she may just purchase some number of smaller items, like pillows and candles, to spice up a room that she already loves.

"Since the retail concept begins with the designer's point of view and the designer is focused on appealing to a particular type of customer in a specific place," Gregg continues, "it's not a model that can be served well by a mass manufacturer. You have to be able to customize. For example, one of my customers, a designer who owns a store in West Palm Beach, has a signature color. To serve her needs, we have to be able to supply our products in that color. This customization strategy gives a real advantage to retailers and manufacturers who can execute it, in that it's nearly impossible to duplicate at the mass-market level."

Based in Savannah, Georgia, designers Claire Reeve and Courtland Smith have been working this new retail model for the past two vears at their shop—Number Four Eleven—located in Savannah's Downtown Design District. "When Courtland and I came to Savannah," relates Reeve, "we saw a real need for a store that features a classic, clean-lined aesthetic. Not modern, our furnishings are all traditional, but basic and simple yet fun.

"We sell furnishings for every room and in every category: sofas, case goods, beds and bedding, curtains, towels and even candles. We set up the store by room, and each section reflects Courtland's and my take on what that room should be. It's about what we like. Customers, however, are usually drawn to a single element of a room scene. They might be attracted to a particular pillow, or a headboard, a loveseat, an upholstery pattern or they might just see a color that they love.

"That one element that the customer loves becomes our point of departure for working with each, individual shopper. If it's a color, we might have a conversation about other colors that they like and how to make those colors work together in a single room or how to incorporate splashes of their favorite colors in the various rooms of their home. We sell products—there's no doubt about that—but more than just products, we're selling information, advice and expertise. I think a lot of people are intimidated by the idea of hiring an interior designer; they've never done it before and they don't know how the process works. Our store gives them an opportunity to gain a designer's point of view through a dialogue that's based on their preferences, interests and desires. We personalize the process of shopping for furniture, and it's that personal touch that so many of today's shoppers are seeking.

"In fact," concludes Reeve, "you could say that personalization is our store's signature—almost literally. We specialize in monogramming, not just one type or style of monogram, but a widely varied selection of monograms that can be customized for each individual customer. And we can put these monograms on just about anything: on pillows, upholstery, bedding, table linens, and headboards—if it can be embroidered, we can make it monogrammed. So, after working with us, a shopper walks away with pieces she loves, in colors that she loves, some carrying a personal monogram that she has participated in creating. Plus, she goes home with information and advice on how to continue making the design choices that are right for her. What better way to put your signature on your home?"

"While these are boutique shops with an exclusive offering," Gregg concludes, "it's important to know that they're not limited to high-end customers. Price points can be well within the mid-range, which makes this a viable concept for many home furnishings retailers. I can imagine cases where a designer wants to set up such a shop, but doesn't have the resources to lease and renovate a retail space, buy the initial inventory, etcetera. Bringing that designer into an existing store and putting her in charge of a couple thousand square feet or so could be a great way for an established retailer to take advantage of this new model."

In summary, today's consumer is more creative than ever and is increasingly empowered with more and better content-creation tools. Surrounded by an abundance of adequate products, her attention and money tends to follow the better experience, making the process of shopping and buying sometimes more important than the resulting purchase. Educated, informed, receiving inputs from a multitude of sources and engaged in a life that involves taking on multiple roles, her tastes meander through all of the style categories with which we have become accustomed. Aware of her place in the world and her power as a consumer, she prefers for her shopping dollars to support socially responsible companies and looks with favor on those that contribute to meaningful causes. To serve this consumer, today's most successful retailers strive to create experiences in engaging, entertaining environments; become co-creators with their customers; present a clearly stated point of view that the customer can buy into across a wide range of price points; and work to establish themselves as responsible, committed members of the communities they serve.



Style and Color RENDS



Now that we have a grip on current consumer mindsets and how they might affect your ways of doing business in 2008, let's turn our attention to the fashion side of trends. What might this year's highly creative, slightly schizophrenic, yet socially responsible customer want to see as she strides up and hands you a computer printout of her new dining room design?

To start with, you might want to have a little yellow on the walls or at least some yellow accent pieces. According to Connie Post, "Yellow is the color for the coming season. We're seeing it in clothing fashions; we saw it at the European furniture fairs; and it's also showing up on the covers of magazines such as *Elle Décor* and *Metropolitan Home*. Grays are still present, and in upholstery I'm seeing more white on white, and neutrals paired with bright accessories. Red remains trendy, and green is also strong."

Becky Ralich-Spak, the senior designer at Sherwin-Williams who develops the company's color forecasts, confirms Post's observations and adds a few more. "Change is in the air," Ralich-Spak claims. "Things are not quite as stable; a shift is underway.

"Wall colors are moving toward the neutrals. Grays are very popular, but they're starting to trend toward the warmer tones. I'm even seeing some silvery grays come into play, but in automobiles, white is outselling silver for the first time in a long while. White and black in combination is making a huge statement. I think this comes from the technology sphere and products such as the iPod, as well as a lingering nostalgia for 1960s American and British pop culture. Browns continue to be important, but not as much as they have been. We're starting to see a shift away from the espressos and chocolates and toward the more metallic tones in the red-yellow ranges, such as umber, bronze and copper, with camels and taupes in the midtones. Green is still important, but the blues are beginning to emerge."

Considering color trends in her internal forecast for Vanguard Furniture, creative director Regenia Payne finds that "Overall, this year's green color family is lighter in tone with the occasional use of evergreen, malachite and emerald to add a quick punch of drama." In addition, as blue emerges it is being combined with green to make "teal the new accent color. Encompassing a wide spectrum of shades from watery tones to turquoise, teal continues to be a great color that pairs nicely with a variety of other hues."

"We're getting bold, saturated colors in accessories and single pieces that balance well with the more neutral background colors," continues Ralich-Spak. "This allows people to bring color into their rooms without making a big investment. In fabrics, metallics are coming on as technology makes it possible to add a little luster without compromising sustainability."

Considering the look and feel of 2008's fabric selections, Payne tells us, "This is the year of the damask. This tried-and-true traditional fabric is showcased in constructions ranging from mercerized cotton to drier linen blends and jacquard designs that provide a raised surface to add dimension. Chenille will also have a major presence, in everything from chunky constructions to finer yarns that will appear in decorative jacquards."

Echoing Ralich-Spak's prediction of mineral lusters, Payne expects to see "more and more metallic touches added to fabrics by the use of

lurex filament yarns. Prints will acquire a bit of a botanical air as florals take on a more stylistic approach in fashion and the home. lkats—exotic, multicolored silks that originated in Java, Sumatra and Indonesia—will make a definite return, adding a stylized geometric influence to the home. And concern for the environment will continue to drive the popularity of natural, eco-friendly and organic goods. Linen, hemp and cotton are the expected entrants, but rayon, a man-made fiber composed of pure cellulose from wood or cotton pulp, also has a sustainable appeal."

"Looking out toward the end of the year," Ralich-Spak concludes, "we see the yellows getting a little warmer and more rustic as the seasons change again. With the approach of autumn, you'll want to show more mustard, ochre and saffron shades. Think in terms of those rich and vivid yet aged and earthy jewel tones in red, green and golden hues."

In her style forecast, Payne synthesizes current trends in color, form and texture into four themes. The first, Pedigree, "encompasses our present culture's aspiration to pay homage to the great style icons of days gone by. Characterized by a refined simplicity that showcases the return of comfortable sophistication, Pedigree shows up in furnishings that are simply elegant, possessing a sense of luxuriousness and presence that makes them feel like inherited items, but reflect today's lighter environment. Neoclassical styles in classic mahogany finishes are paired with lightly lacquered chests and accented with slight golden touches. Rich fabrics, such as velvet, mohair and tightly packed chenille enhanced with just a touch of lurex elegantly dress expertly tailored sofas.

"Elegant Escape embraces our need to get away from the confines of the indoor environment. The trend toward outdoor lanai-type living has increased steadily in recent years. The relaxed, natural feeling of being one with nature while still maintaining a level of comfort usually experienced indoors is fueling the growth of outdoor kitchens, living areas and entertainment areas. Furnishings include updated woven materials, teak, plush cushions, softer, more sensuous fabrics and more deep seating and cushion options.

"Urban Archivist is composed of the mixes of media found in the modern urban environment, and is an especially important trend for the GenX customer. Loft living continues to be a growing lifestyle that is fueling a need for pieces that are both stylish and functional. Furnishings in this category are moving away from the dark ebonized stained and painted woods that show no grain to fancier veneers such as burl with a clean coating of varnish that allows the beauty of the wood to accent the form. A blend of styles that extend beyond just modern are blurring the clean lines of the purely architectural aesthetic. The setting is still uncluttered, but is taking on something of an acquired feel. These are pieces that bring a boldness of color and style to the open floor plans and flowing spaces preferred by GenX consumers.

"Our fourth design theme, Renewed Acquaintance, expresses the need for a more casual approach to elegance. Tried-and-true forms with somewhat softer, slightly distressed veneers in warm, glowing finishes connote a comfort that comes from familiarity. Fabrics for this theme herald the return of Art & Crafts inspired florals in prints and woven jacquards, folkloric embroideries and rich textures such as chunky chenilles. An advertisement for Brooks Brothers clothing provides perhaps the best summary of Renewed Acquaintance, saying 'Where forward thinking interprets the past and the past informs the future."



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As you consider new ways to engage your customers, create compelling experiences and deliver extreme service, our full schedule of

spirit of a bygone era; escape to a luxurious outdoor room or bring on consumer lifestyles, trends and retail best practices. And as the one place where the whole industry comes together, High Point is the place in the familiar confines of home; there is one place where you're sure to meet, share ideas and build relationships with the manufacturers, consultants, designers and retailers who set the course for our industry and can contribute the most to the growth of your business.

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