



NO boundaries

BY CLYDE SOLES

OVER THE PAST FEW SEASONS, THERE HAS BEEN A VERITABLE gold rush of outdoor apparel companies prospecting in the alpine ski market. Just about everyone in the rag business has developed entire clothing lines designed for riding lifts. Core outdoor brands such as ArcTeryx, Cloudveil, Mountain Hardwear and Patagonia are now attending the Snowsports Industries America (SIA) trade show in Vegas every winter. And sales reps are targeting shops that have little in common with the traditional outdoor retailer.

But, what's the thinking behind this trend? And how can outdoor retailers capitalize on it and more effectively plan rack space for the coming fall?

SNOWSPORTS INDUSTRY

According to the SIA Intelligence Report, the snowsports industry rings up about \$500 million worth of business per year in apparel. These dollars have certainly been enticing to an outdoor industry seeking to expand its market.

Some of the mainstay outdoor brands have long attended the SIA show. Many alpine skiers are familiar with The North Face Steep Tech collection—a clothing line that has been around so long that it's now coming back as a retro look.

Marmot has also had a long presence at SIA, according to spokesman John Cooley. "Our first attendance was 1987 and we never left. Then, we had a very differentiated alpine ski line. It consisted of about 10 products, plus accessories," said Cooley. Now the collection includes more than 30 styles, not including underwear and gloves.

For Mountain Hardwear and Patagonia, they have attended SIA more sporadically. "We first started at SIA as a brand in 1996, but stopped in 1998," said Mountain Hardwear President Mike Wallenfels. "We then attended again in 2000 due to the Olympic (dates) conflict with Outdoor Retailer. Mountain Hardwear started attending SIA again in 2003 as we started to grow with more retailers that were only attending that trade show. We also feel that it is important to support the



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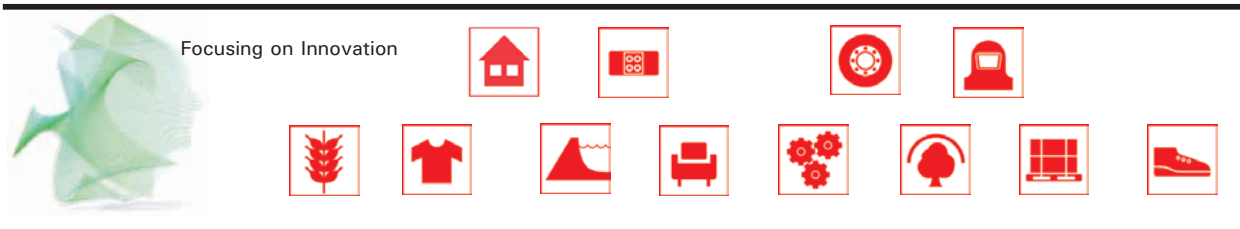
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overall market by attending and participating as a member of the trade association.”

Patagonia too has only recently committed again to SIA, with 2005 marking its latest return. Despite a long absence, Rich Hill, vice president of sales, is emphatic that, “We never didn’t do skiwear. From day one, we have been selling to ski shops.” Originally, Patagonia attended SIA with a skeleton crew primarily to support organizations it was involved with, such as the Professional Ski Instructors Association and National Ski Patrol. But the introduction of the Edge collection in 2004 was the impetus for a significant presence in Vegas.

Among the newer outdoor brands to crossover was Arc’teryx, which first attended SIA in 2001 to show its Descent collection—not surprisingly, the company was purchased by Salomon the next year. More recently, Cloudveil showed its Vertical collection in 2004, and Marmot debuted its Snow collection in 2005.

BLURRING THE LINES

Of course, most of us in the outdoor industry have been using our backcountry clothing for front-country skiing and riding at resorts all along; occasionally passing through gates for out-of-bounds side country powder runs. Certainly, gear designed for backpacking and climbing can work just fine for sliding down snow slopes. And though they’d be loathe to admit it, some telemark skiers like the mountaineer look to further set themselves apart from what many consider frou-frou alpine skiers and baggy-clothed snowboarders.

Outdoor companies are reaching out to the alpine ski market partly because of the significant number of people who are traditional backcountry skiers that now ski both backcountry and front country. Many skiers and snowboarders are at the resorts and in terrain parks when backcountry conditions aren’t ideal or too dangerous because of avalanche hazards. Others may simply have reached an age, fitness level and income bracket where riding lifts has more appeal than skinning up hills.

While there is much in common, there are also key differences that sometimes make backcountry clothing less than ideal for resort skiing. In the backcountry, skiers always have a pack that allows them to add or shed a

layer as the weather changes. And since they are usually self-powered, weight and bulk of clothing is more of a consideration.

At resorts, skiers seldom wear a pack and it can take a couple hours to get back to a condo or parking lot, particularly at large ones like Mammoth and Vail, if layers need to be adjusted. Plus, overheating on runs followed by chilling on lifts can make dressing comfortably a challenge. Well-designed snowsports apparel can have the luxury of being heavier to offer features the backcountry purists consider frivolous.

Thus, most of the outdoor brands chasing the snowsports market are adding features to their backcountry designs. For example, Wallenfels told GearTrends®, “At Mountain Hardware, we created a universal set of features that focus on user-friendly elements such as MP3 pockets, removable powder skirts, pass holders, removable hoods, insulated hand pockets, and internal pockets for goggles or gloves. We have also looked at color and style being a critical point of differentiation from the core outdoor line.”

As one of the older players in this market, Marmot has had time to try a variety of approaches over the years. And it hasn’t always been easy, according to Cooley.

“We had to remember, or learn, who we were to the alpine retailer,” said Cooley. “We thought we had to be something different. But the solution was to be very good at who we already were: highly functional, simple, clean with good fit and detail. Once learned, we had a place in alpine shops.”

Where the products are sold has also become more blurred in recent years—another point with which Wallenfels agreed.

“It is extremely difficult to draw the line on what makes an outdoor shop and a ski shop. We have made attempts in the past to classify retailers, but we abandoned the experiment,” Wallenfels said.

Steve Sullivan, co-founder of Cloudveil and now the company’s director of advanced product development, estimated that roughly 65 percent of its snowsports apparel is sold in ski/snowboard-specific shops. Similarly, Cooley said Marmot does more business in the ski shops because of the features it offers, like removable hoods, tons of pockets, performance linings, component jacket options, insulated styles and powder shirts.

THE SOFT DILEMMA

Do alpine skiers understand soft shells? It’s a bit ironic that the technology of stretch woven fabrics came from the alpine ski world in the ‘50s in the shapely

form of Bogner pants. Yet fashion trends went in another direction and, aside from racers, stretch fabrics all but died out at resorts. For the past few decades, alpine ski shops have mostly sold non-stretch, insulated clothing; much of it long on style and short on quality materials and construction.

Meanwhile, the outdoor industry has had 20 years to figure out how to make functional jackets with stretch fabrics that are wind-resistant and breathable. For the first decade, few had heard of or understood how the technology worked. But in the past decade, soft shells have continued to snowball, becoming a mainstream outdoor product in many parts of the country.

Over the past few years, outdoor brands have been trying to reintroduce soft shells to the snowsports world, but it hasn’t always been an easy sell for a variety of reasons. Confusion over what fabrics work best for different conditions has sometimes resulted in disappointed customers.

“Soft shells are still a little foreign and are not cozy and warm...yet. The weather has to be pretty mild to use a soft shell garment for snowsports, but I have seen in Europe that it is much more common,” said Wallenfels. “I believe that it is a category that will grow as we expand into warmer fabrics and designs. While soft shells have yet to be fully embraced in snowsport use, we see insulated soft shells gaining a position in the near future.”

Cooley agreed. “Like the DriClima wind-shirt, it takes time for soft shells to catch on. The first question is whether ski retailers get soft shell. Because the aerobic needs of an alpine skier are so much lower than a backcountry skier, the ski soft shell tends to be less breathable, warmer and heavier—witness the Gore-Tex soft shell ski styles versus outdoor styles—and sometimes lined—a contradiction for the climber,” he said.

“More importantly, there is a demographic thing here,” added Cooley. “Younger alpine skiers want to look like a mountain guy or gal, and not like they are from Scottsbluff. So they lean toward the soft shell as a look, perhaps not fully understanding, or caring about, the function. The piste telemarkers, lifties, food service folks and locals all reinforce a mountain soft shell look. And they are likely going to buy that look in a local mountain store.”

This presents a dilemma for ski shops trying to sell soft shells. They haven’t traditionally sold the “mountain look” so they don’t stock it, creating a self-fulfilling prophecy. At least until warmer soft shells catch on, outdoor shops will have an advantage selling to the crossover market.

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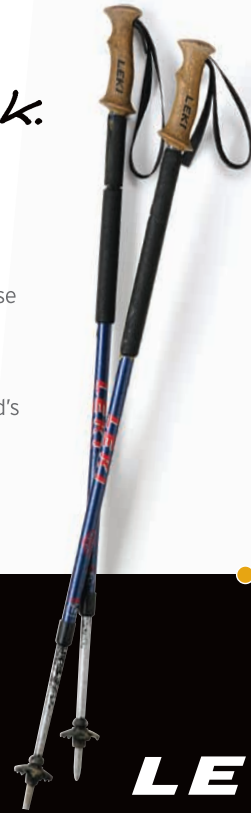


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Brands like Arc’teryx and Patagonia are having good success with blending hard and soft shell materials in hybrid jackets, which are popular with front-country skiers who are starting to get out-of-bounds.

Cloudveil—the company that frequently gets credit for getting the soft shell category going eight years ago in Jackson Hole, and helped popularize the technology—said skiers get soft shell far more than the outdoor industry might realize.

According to Sullivan, “Soft shell is a style. It is the classic stretch woven that we helped pioneer for the backcountry. It is now Windstopper soft shell. It is insulated soft shell, and even many types of waterproof/breathables—including Gore-Tex—are being touted as soft shell. It is pervasive in the ski market. So the answer is, yes, alpine skiers are totally getting it. The reality is the old stretch ski pants of the ’50s and ’60s were the first real soft shells and so it’s been around that market for a long time.”

STEPPING UP TO SKIWEAR

Just as alpine ski and snowboard shops have been slow to draw in the telemark and AT skiers, backcountry stores have long ignored the front-country skiers and snowboarders. If outdoor shops understand the needs of

this broader consumer market, they can boost sales without losing their identity.

“Many outdoor specialty retailers are evolving away from the me-too look of much of the classic outdoor apparel and looking for distinctive programs that draw in and appeal to a new customer,” Sullivan told GearTrends®. “These outdoor specialty retailers are realizing that bringing new programs to their stores is an effective way to diversify ... even the big guys like REI are selling Roxy, Burton, etc. It is becoming more and more commonplace for our outdoor retailers to look hard at the entire range and not just our Backcountry programs.”

This doesn’t mean Sullivan, who was a retailer before his Cloudveil days, is advocating bringing in a full selection of alpine fashion wear that might seem out of place in an outdoor store chock-full of packs, tents and sleeping bags. Insulated pieces—perhaps with a roomier fit and waterproof reinforcements on shoulders, thighs and seats for sitting on chairlifts—are good places to begin expanding a selection. While zip-in liners aren’t popular with climbers and backcountry skiers, front-country users often consider this a great feature.

“The strongest category for alpine-re-

lated products would be anything with insulation that is either fixed or removable,” Wallenfels added.

“I do believe that outdoor retailers are getting better at selecting styles that are more focused on the alpine consumer,” Wallenfels said. “Functionally, outdoor and alpine have shared similar features, but as outdoor has started to focus on less weight and more simplicity, this has been counter to the alpine consumer who is not necessarily wearing a pack and is looking for durability and warmth rather than low weight and compressibility.”


With nearly two decades in the alpine ski category, Marmot has tried various style collections, including some that were full-on fashion, and settled on what works. According to Cooley, the snowsports products experiencing the best growth are less style-specific, more versatile and more mountain-oriented.

Compared to the fashion ski market, “The outdoor customer niche is more specific and so are the feature sets necessary to hit that niche. Garment weight, length, colorways, hood style, pocketing, fabrics and finishing are more narrow for outdoor,” Cooley said. “Three-layer is strong in outdoor. Two-layer lined is strong in ski. Shells are outdoor. Insulated is ski. Layering is outdoor. Components are ski.”

Cloudveil, too, said it emphasizes the feature set to the front-country user.

“We have paid much more attention to our backyard, our mountain culture and the western vibe. Our new collection has features people really want in pure freeride apparel, such as iPod pockets, pass pockets, etc.,” said Sullivan. “Insulated styles are very, very strong for us, and so we’ve expanded there.”

Location is also an important factor in what sells. According to Wallenfels, “There is a clean line separating the nation at the Rockies. East of the Divide, insulated hard shells are the standard and most retailers don’t want to look at any non-insulated shell tops. The West will indeed layer and also has more mild conditions making an insulated jacket too hot for most use. Since we are focused as a backcountry ski brand and a majority of our sales are West of the Divide, we still show a majority of our styles as shells or shell systems.”

Although the major outdoor brands are making a push into the ski world, outdoor retailers have much to gain by luring the general public. With a good selection, new customers can be enticed through the doors. And, quite possibly, they will return for other gear when the snow melts. 

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