



BY CLYDE SOLES

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Fabrications, fit, styling and colors—
check out the *latest in pants* for any winter sport.

JACKETS AND PARKAS GET ALL THE ATTENTION: countless pithy reviews in magazines, fashion spreads starring sexy models, and TV appearances on weather reporters. Yet when it comes to staying comfortable while performing any winter sport, pants are no less important and can be just as technical.

Ranging from around \$180 to over \$400 at full retail, ski pants can be a hefty expenditure for stores to inventory. But no fear, GearTrends® gives you the lowdown on the market for both resort and backcountry ski pants, which increasingly are overlapping categories.

TO BIB OR NOT TO BIB?

Among the first things your customers must decide is whether to go with standard pants, full coverage bibs or one of the newer in-between styles. This is a surprisingly hot topic where opinions run strong and there is little middle ground. As Arc'Teryx's Conroy Nachtigall put it, "It seems those that like bibs really like bibs and that's all they wear. And those that don't like bibs, well, really don't like bibs."

Jeff Wogoman, director of marketing at Cloudveil, said he noticed a similar niche. "Categorically, bibs aren't the best sellers. But for the group of people who are out in the elements, and a latte at the mid-mountain lodge isn't a chairlift ride away, bibs are still very appealing," he said. "Cut and fit have become much better over the years, and there's no better substitute for keeping your core protected than with a bib."

Some companies are now offering pants with a higher rise in the back, often combined with suspenders, to help combat the dreaded snow down the back of the pants after a fall. Essentially bibs without the chest pocket, these can offer a good compromise in performance and fashion.

According to John Cooley, director of strategy development for the technical apparel platform of K2, "Backcountry skiers do not like the confinement of a traditional bib. These bibs can be hot and hard to ventilate. But they want a bib for protection across the back. So, at least what we do at Marmot is design a low-rise bib to ensure protection across the back, but keep the front low to provide ventilation. Even climbers say they want less fabric and more ventilation."

Since it's hard enough to get a good fit from the waist down, women tend to be even more averse to bibs. "The women who

really want them learned to ski when bibs were the fashion statement. Or, they do a lot of ice climbing," Carolyn Cooke, co-founder of Isis, said. That certainly narrows the market and makes selling women's bibs more challenging.

On the flip side, representatives from both The North Face and Salomon said they believe that one-piece suits will make a comeback and will have new offerings next season—but only time will tell how it will pan out. A more likely candidate for success is Mammut's Atlas Hybrid jacket and pants, which can be worn separately or zipped together at the powder skirt for total protection and maximum warmth.

Many lift-bound skiers simply prefer pants, often with a looser cut (read: big and baggy). Often, they'll make a fashion statement with a belt, which, Matt Page, The North Face's product director of snowsports, said can be an opportunity for retailers. "Belts are also popular right now. They're sometimes being sold with the pants. One of our main dealers has had a lot of success selling belts alongside their jackets and pants,

and we are beginning to supply belts to them in fall '07."

A TOUCH OF WARMTH

In the past few years, insulated ski pants have grown in popularity, particularly for resort skiers. Rather than multiple layers for warmth, they will wear lightweight underwear and insulated pants. As fabric breathability and ventilation have improved, this system can be quite versatile across a wide range of temperatures.

The Snowsports Industries America (SIA) Topline Report indicated

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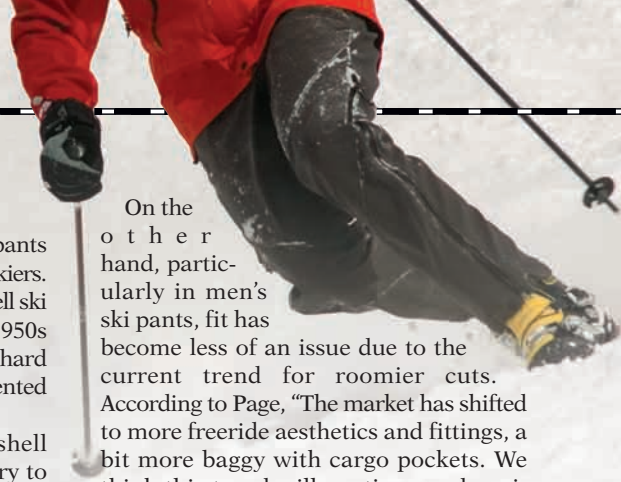
**Winter Outdoor Retailer
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and The Magnum (new)

On Model:
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that sales of insulated pants at the specialty stores where it tracks numbers increased by 19 percent in units and 24 percent in dollars. These accounted for 34 percent of bottoms by dollar last season versus 28 percent the previous season. Chain stores saw an increase of 39 percent in units and 27 percent in dollars, representing 22 percent of all bottom sales by dollar.

Meanwhile, hard shell pants in specialty shops increased 11 percent by units and 6 percent by dollars, accounting for 22 percent of bottoms by dollars. In chain stores, the increase was 6 percent in units and 3 percent in dollars. The category claims 29 percent of all bottoms.

According to Cloudveil's Wogoman, "Definitely performance insulation with less layering is being demanded more. Style is a factor, and it has to perform—people don't want to be sweating their asses off out there. We were first to market with an insulated stretch woven and that family of products is one of our best selling."

Others see insulated pants mostly selling to women. The North Face's Page noted that popularity varies by gender. "Women prefer insulated. Men's is reverse; we sell more shells to men."

Since Isis only makes products for women, it is more tuned into that customer base. "The strength of our soft shell pant program where there is light polyester or microfleece bonded to shell makes me think that women would rather have their warmth all in one package and she does worry about being cold," Cooke said. "The true backcountry aficionado is probably still layering with shell pants and body layer tights. But, the general outdoor enthusiast wants to be comfortable without having to own a lot of pieces and pants to do so."

Nachtigall at Arc'Teryx, though, said he is skeptical of the longevity of the insulated trend. "There seems to be a big desire for insulation everywhere, including pants now, but I think this may be short-lived as soon as people find out how cumbersome they are. Our focus tends to be based more on weight reduction and durability, although a fully insulated snowsports pant may be on the horizon, as will soft shells and hybrids."

A few remain unconvinced of the viability of insulated ski pants. Jeff Cunningham, Marmot USA's marketing director, said, "Insulated pants have not been a popular choice. While great in some specific conditions, they just don't offer the wearer any variability as far as day-to-day fluctuations in temperature and activity. Consumers are buying hard shell pants and insulating by way of different layering options. We are not focusing on insulated pants for this reason."

WHAT ABOUT SOFT SHELL?

Most companies agree that soft shell pants have been slow to catch on with resort skiers. Of course, the great irony is that soft shell ski pants were hugely popular from the 1950s to the 1970s, before fashion shifted to hard shells—and before soft shell was reinvented into jackets by the outdoor industry.

"Perhaps because of price, soft shell pants are still something of a mystery to U.S. consumers," said K2's Cooley, voicing what appears to be a common sentiment. "Marmot's soft shell pants rock in Europe, but languish here."

Wogoman at Cloudveil explained that the difficulty is partly due to the activity level of average skiers. "Backcountry skiers, climbers and alpinists long ago figured out the advantages to stretch woven, but the general end user doesn't see the same benefit that a true mountain athlete depends on."

Paige Boucher, Mountain Hardware's spokeswoman, said the company has noticed a decline in growth for this category of ski pants. "Soft shell pants were growing faster than hard shell pants until 2005, where there was a shift back to hard shell. Hard shell has always had more units, but the rate of growth for soft shell was strong until 2005."

The term "soft shell" is still a bit vague, which is part of the conundrum for consumers and retailers. "Soft shell is tricky. It depends on how you define soft shell—some people call it stretch. In pants it's difficult to incorporate stretch and be waterproof," said Page of The North Face. "Soft shell is catching on the fashion side due to its great fit and functional stretch, especially for women."

MAKE IT FIT

Ask a true pant connoisseur—that is, almost any woman—what are the most important features of ski pants and you'll get an earful. Invariably, she begins with comments about fit. Not that guys don't care, just that we aren't quite so, um, particular. And our shapes are, um, somewhat less varied.

"Women want pants to fit—not an easy thing for most of us," Cooke said. "And they don't want their pants to look goofy." Translation: baggy butt or pouchy front from elastic.

Brands that offer different inseams in ski pants, like Arc'Teryx, Isis, Marmot and Patagonia, earn a loyal following from customers who aren't built like catalog models. It is certainly trickier for stores to stock the extra inventory without having to closeout the leftover sizes at season's end. But this is one area where specialty shops can capture customers both from chains and Internet stores.

On the other hand, particularly in men's ski pants, fit has become less of an issue due to the current trend for roomier cuts. According to Page, "The market has shifted to more freeride aesthetics and fittings, a bit more baggy with cargo pockets. We think this trend will continue and position impact on the industry's growth."

This isn't just limited to resort skiers, said Judy Kim, Patagonia's product line manager for ski/snowboard. "We've found that snowsport pants are still trending toward looser fits, both in resort and even in the backcountry. Before, it was generally the snowboarders that were wearing looser cuts, but with the growing popularity of freeskiing and twin tipers in the park, skiers are also going for looser fits," she said. "Even in the backcountry, our athletes are asking for relaxed fits because they are easier to move in and they like the look. In the backcountry, though, the pant can't be overbuilt like some of the resort styles due to weight issues."

PICK A COLOR

According to a research report issued by SIA: "Green will be huge throughout 06/07 snowsport apparel and outerwear. Earth tones, chocolate browns, khakis and neutrals will also be prominent." SIA is also forecasting the popularity of "a wide variety of prints and patterns including tweeds, houndstooth, plaids, pinstripes, gold lame and camo," the report said.

By all accounts, though, black continues to rule when it comes to pants—often outselling other colors by five to one. Quite simply, black pants go with almost any jacket already in the closet and with any future purchases.

Some have said that "brown is the new black." Maybe, but Page contended, "Black is definitely not out. Stocking more colors is more important than it has been in a long time—there is a fashion element in snowsports. It's not only multiple colors; it's also fabric and prints, like corduroy, herringbone, tweeds, pinstripes, camouflage and jacquard print."

For specialty retailers selling to the under-45 crowd, it will be more important to take a gamble with brighter colors and patterned prints. But hedge your bets with neutrals: off-whites, grays and blacks. Following fashion trends is not for the faint of heart.

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