



bottoms



BY THERESE IKNOIAN

These ain't your granny's bloomers. If you can't use words like **THONG**, **BIKINI** and **UP-AND-OUT FLY** without snickering, you're laughing yourself right out of a sale.

UP



BREAST SIZE, FLY ACCESS AND THE SIT OR FIT OF A THONG PANTY are phrases that get flung around in chats at trade shows these days as commonly as denier, DWR or strobel lasts. And we aren't talking during happy hours with a frothy cup 'o beer in the hand and a round of guffaws afterward.

As the outdoor industry grabs onto the backside of the intimate apparel market, everybody wants to sell undies—from bras and bikinis, to thongs and briefs. Move over Calvin Klein, Maidenform, Hanes and Playtex. Here come the outdoor tech heads.

"It's a crazy time in the base layer world right now," said Rich Hill, Patagonia's vice president of sales.

Ex Officio President Rick Hemmerling shakes his head too, readily admitting he never dreamed his company steeped in the fly-fishing industry would carry thong panties and indeed found it "a little bit shocking" that product developers wanted to add them to the line.

"I said, 'We're not going there,'" Hemmerling said now with a chuckle about his resistance. "I said, 'What does that have to do with hiking and comfort and travel?!?'"

As it turns out, it has everything to do with hiking and comfort and travel. Before the great march forward into underwear by outdoor performance apparel manufacturers—partly thanks to category leader, Patagonia—active outdoor customers would drop a pile of coin on the best functional mid-layer and outerwear gear to stay warm, dry and comfortable. Then they smashed the whole performance picture by pulling on their cotton/spandex tightie-whities and cross-your-hearts underneath it all—the ones they had bought at the department and discount stores down the street from the outdoor specialty shops.

One day, company execs sat up, slapped themselves on the forehead, and realized they'd been missing the boat not only in completing the performance puzzle, but also in creating a no-brainer opportunity for sales.

"When you think of that one piece of clothing that everybody wears, every day," said Isis For Women Co-founder Carolyn Cooke, "it's underwear. There's a lot of opportunity."

TALKING TA-TA'S

Now that the outdoor techies are talking ta-ta's and other intimate places as well as pieces to support them all, the size of the opportunity has slapped everybody in the face. The NPD Group, an international marketing information company that researches just about everything, said the women's intimate apparel market alone for the 12 months ending in August 2004 was worth \$9 billion in U.S. retail sales, which was up 7.3 percent over the previous period, which was up 4.7 percent over the *previous* 12 months to that. That figure includes bras, panties, daywear, "shapewear" and even "thermal intimate apparel."

For men, where the category is simply called "underwear"—go figure on that one—the period ending in August 2004 was worth \$3.3 billion in retail sales, up 4.4 percent over the previous year. That includes boxers, briefs, tops and "thermal" wear. Those figures account for all retail channels, according to The NPD Group, including specialty and sporting goods. Speaking of channels, this is where the news could make a supplier or specialty retailer gleeful. For men, specialty channel sales were up 14.8 percent, while mass markets were *down* 5.8 percent. For women, specialty sales were up a whopping 21.4 percent and remain the largest single sales channel; next largest channel for undie sales is mass markets and they

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are bemoaning a sales drop of 6.4 percent.

Now, let's really talk ta-ta's: The NPD Group's market report on women's bras shows sales in that category alone reached \$4.7 billion for the 12 months ended in July 2004, up 6.4 percent for the same period a year earlier. Of that, sports bras make up \$320 million in sales.

Certainly, women's bras are the largest single segment, but that doesn't mean the outdoor industry has gotten all wrapped up in bras alone. No, indeed, everywhere you turn these days at trade shows, you walk past mannequins and showcases with briefs, boxers, bikinis and even the continued butt of jokes, the itty-bitty thong.

Hill of Patagonia said his company "caught a lot of heat" when it relaunched its Capilene seamless "Body" line in spring 2001. "When we came to OR three years ago and we put it at the front of our booth, everybody snickered, 'Oh, Patagonia's selling thongs,' and we looked 'em right in the eye and said, 'Hey, what do you expect women to wear under their ski gear?' We didn't shy away from it."

Nor did anyone else, as the buzz got louder: From the likes of Duofold, Hind and Ex Officio to Moving Comfort, Isis, Mountain Hardwear and Hot Chillys (some expected players and some not so expected), everybody has been busy launching or trying to launch intimate apparel. Patagonia showed its first really new redesigns of the Capilene line for spring 2005, adding a lower-cut thong, a hipster, revised the bra tops (including a more supportive bra for C and D cups with a floating underwire system), and added more patterns as well as plain black and white. Men, you can get off your high horse about women's intimates being just for fashion and not function: Take a look at the men's form-fitting variable knit crew (a.k.a. Captain Kirk look-alike) with a spike-like knit-in design on the ribs on each side. You think that's really for shaping? Ha! That's for ego; if you don't have a six-pack, these little babies will help it look as if you do.



Moving Comfort, always a leader in active women's wear, finally added a serious selection of bras in 1995 after 18 years in business and added underwear (including thongs) to its line just in 1999. Now, said Elizabeth Goeke, executive vice president for design and development, sales of bras and un-

derwear account for 55 percent of the company's gross sales, and the company is expanding its seamless line in spring 2005 with another top and more colors.

Helped along by newly hired development directors with experience at Victoria's Secret, Hind a year ago launched underwear—and had models in undies standing on stumps in front of its booth at Winter Market 2004. Its Motion Sensor bra has won acclaim for its highly wicking, molded cups—no smooch "uni-boob" here—and superior support, which were promoted at the show by an ice cream social with the promo line, "How many scoops are you?" Hot Chillys rolled out its Salsa women's intimate seamless line for spring/summer 2005 after spending more time than expected on development "to get it right."

Long known for its long Johns, Duofold at Summer Market 2004 showed seamless intimate apparel, recognizing the company needed to start attracting more youthful, athletic customers, according to Maria Teza, director of merchandising and design. It touted what it called the first "useable" fly access on its seamless boxer (patent pending). SmartWool said it's sticking to microweight tanks, briefs and a boxer with what it calls "Up and Out" fly access, which the website said "provides easier access yet keeps assets inside." Icebreaker CEO Jeremy Moon told GearTrends® that the company will have some "innovative new feminine underwear solutions" for 2005 to be seen at Winter Market, but wanted to keep the debut hush-hush until show time, folks.

Ex Officio launched its cut-and-sew "Give-n-Go" line in 2000 with the tagline, "17 countries. 6 weeks. And one pair of underwear," to emphasis how travel-friendly it was, then topped that at the 2004 Outdoor Retailer summer show by showing a more youthful seamless line for spring 2005. Now, the little fly-fishing company shows sales in that category up 55 percent as of November 2004 year-over-year.

As others dive into the intimate fray, many still give a friendly nod to Patagonia's leadership.

"Patagonia has done a good job of opening the door," said Cooke of Isis, which showed its first few seamless pieces at Summer Market 2004 and will roll out a full line at January 2005's Winter Market. "But there's huge room."

HOW'S IT WORK?

So it was a no-brainer to do technical underwear—keep customers comfy from the skin out and keep them in the store. But

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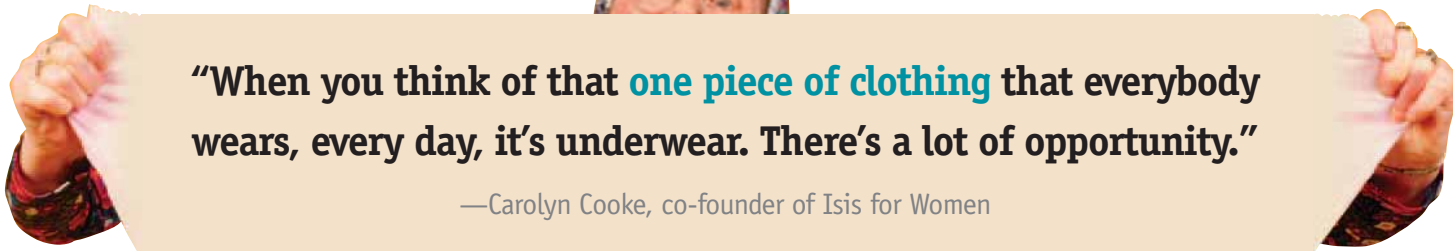
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“When you think of that **one piece of clothing that everybody wears, every day, it’s underwear. There’s a lot of opportunity.”**

—Carolyn Cooke, co-founder of Isis for Women

how do they or the retailer really know if all those highly touted qualities are true: anti-bacterial, anti-microbial, odor-resistant, breathable, wicking, quick-drying, supportive, moisture managing, yada yada ya....

Well, you don’t. Plus, it’s so personal because some people sweat or stink more than others and in different places more than others. “All of this is confusing,” said Kathleen Swantko, president of Fabriclink.com, an online resource for fabric and fiber information. “That’s just where it’s at—without going to a lab to test the stuff.”

That’s because every company basically uses an engineered fiber that a mill somewhere has developed just for them, she said. Then they might add some kind of finish to increase moisture-wicking or stain-resistance. How are you to know what does what? Read the hangtags and try the products. But if the label simply says “nylon” in some high percentage and the tag on something at, say, Costco or Marshall Field’s says the same thing, what’s the difference? Nylon itself has an inherent ability to breathe and not allow

water to penetrate, but it doesn’t wick moisture, Swantko said. And it’s not engineered, so it won’t have any of those other performance qualities, she added, but it will be soft and comfortable.

CONVINCING BUYERS

Of course, getting those retailers to belly up to the bikini and boxer bar and place an order was another matter; the suppliers mostly said. Ex Officio’s Hemmerling said about half of the company’s accounts said something like, “Underwear? I do backpacks, skis, fleece, Gore-Tex...not underwear...well...I don’t know....”

Said Lisa Hollenbeck of The Alpine Shop in St. Louis, Mo., “I have to admit, I was hesitant at first. How much wicking does a thong have to do?” She and husband-partner Holly carry Ex Officio and Patagonia, and now they can’t get enough. Plus, they know the customer isn’t just buying it for those wick-needy activities. At least for the women, fashion is part of the draw (Patagonia is said to have used the renowned Cosabella thong as its pattern).

“Fabrics that perform like that are just more comfortable every day of your life,” said Hollenbeck. She and other retailers add that the prices—\$13 to \$18 for bottoms and \$25 and up for bras and tops—doesn’t tend to scare away the specialty shopper. “If it looks nice enough and performs well,” she added, “women will spend a lot of money.”

Goeke at Moving Comfort said the male buyers are sometimes the hardest to convince. She said she would hear, “Oh, we don’t have a thong customer,” and she would say, “Now how would you know that?”

Yet, as Cooke at Isis has pointed out, underwear is something everybody buys and wears. So why not keep those people in your store to do the buying? “Why would you force your customer down the street to Costco or the department store to find those accessory items?” asked Hemmerling. “Once you have the customer in the door, you should fill all their needs.”

REI has also grabbed the category with gusto, merchandising an entire underwear section and now seeing low double-digit growth in the men’s and women’s boxer/brief categories.

Even for stores like REI and The Alpine Shop that do well with it, getting staff to sell

it well is another matter. “The guys can’t do it,” said Gary Neptune, owner of Neptune Mountaineering in Boulder, Colo. “It’s either self-service. Or it simply isn’t.”

SELLING THE FUTURE


Neptune said the women customers won’t ask guys and either search out a female staffer or figure it out themselves, and the male customers don’t need or want to ask, just grabbing what they need. That seems to hold true for most retailers we spoke to.

Getting staff to actually prompt a sale can be challenging. Some suppliers suggest not addressing the intimate side of the picture, but just saying something like, “Have you seen Item X from Company Z?” Neutral statements like that help sales clerks avoid having to talk breasts or “packages.”

And every store has found out what works best for them with merchandising—some hang it, others bag it, some stack it. Goeke said underwear for women is a “tactile buy” and should be touchable. Hollenbeck said she is adopting what the traditional stores do with underwear—instead of discounting, she’ll run a special like, “Buy three, get one free,” which promotes additional sales.

Now, about trying on intimate pieces? Kate Rosso, co-owner of Elephant’s Perch in Ketchum, Idaho, said they handle it verbally. Hill called the fitting-room scene more like “don’t ask, don’t tell.” Hollenbeck said most retailers simply hope “nothing gross happens.” Neptune is the only retailer we found who actually posted a sign in the dressing room: “Ladies (gentlemen?), please take care when fitting the bra tops as to not leave them in an unsaleable condition.” Rosso said she has at times taken home items to launder.

Not every manufacturer taking on undies can or will make it, all agreed. But it opens up the market to a wealth of ideas for the future. Seamless in underwear? Why not? And it once again underscores what specialty is all about: “The specialty market is about specialness,” said Hill, “and the customer is going into these stores to find something they can’t find someplace else.”

Why can’t that something also be an itty-bitty thong or a silky boxer? 

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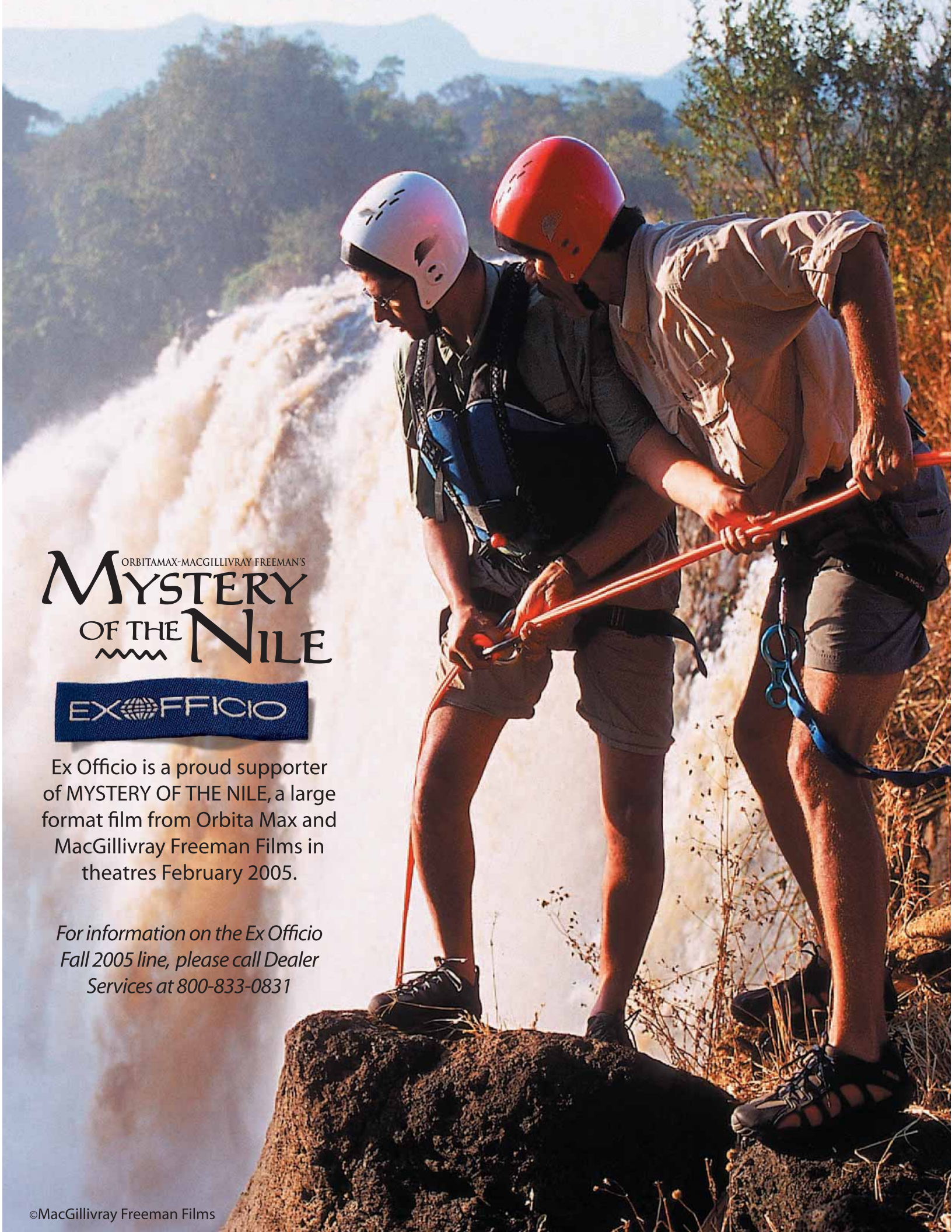


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