Footwear Leads the Bounceback

Outdoor specialty stores are rebounding nicely from a difficult 2009. So far in 2010, the entire channel is up 3% in dollars sold according to data from Leisure Trends Group's Outdoor RetailTRAK™. However, the gains are not systemic, as certain categories and certain regions are performing better than others this year. In general, the Southern and Western parts of the country are seeing an uptick in sales, while the Midwest is relatively flat and the Northeast continues a downward trend. There are also winners and losers in each region as consumers across the country look ahead to warmer weather and a cautiously optimistic economic environment for the remainder of 2010.

Across the entire country, footwear is a big winner so far this year. The entire footwear category is up 17% in dollar sales so far in 2010* with double digit growth coming from boots, shoes and sandals. Looking ahead to the summer months and summer products, hiking boots, multisport shoes and trail running shoes are performing well across the country thus far in 2010. Sandals are also seeing early-season growth across the country. Casual shoes, on the other hand, are selling in the South and the Northeast, but continue to suffer out West. Leisure Trends Group Retail Analyst Elisabeth Stahura points out additional regional differences. "In general, the South and West bring in the highest volume of footwear sales, and both lean heavily towards the multisport category and the hiking boot category. However, Southern consumers purchase more footwear within the 'lifestyle' categories such as casual shoes and sandals than those in the West." Looking at the most recent 12 months, about 26% of total footwear dollars in the South came from sandals and about 11% came from casual shoes, while 16% of Western footwear sales came from sandals and 9% from casual shoes during the same period. Stahura also sees geography come into play when looking at specific brands within the channel. "Over the past several years, certain brands with a lot of buzz such as Vibram, Toms, Sanuk, and Olukai tended to catch on faster and sell more volume in the South than in any other part of the country." She adds, "Several factors could be playing a part in these sales patterns, including weather differences."

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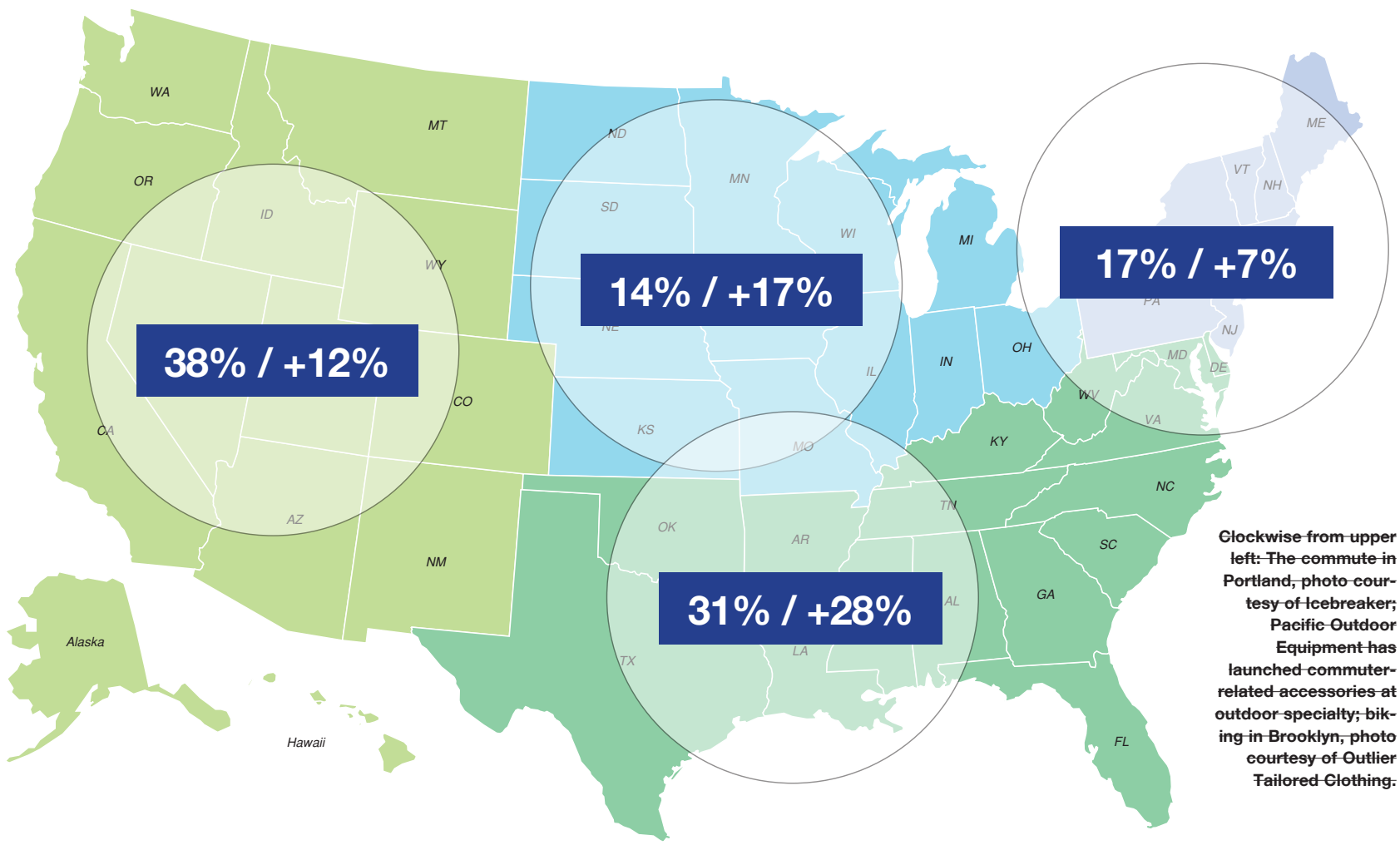
For the recently concluded winter boot season, the Leisure Trends data painted a positive picture. Specialty retailers not only increased

Southern and Western Regions are Leading Bounceback



Clockwise from upper left: The commute in Portland, photo courtesy of Icebreaker; Pacific Outdoor Equipment has launched commuter-related accessories at outdoor specialty; biking in Brooklyn, photo courtesy of Outlier Tailored Clothing.

TREND INSIGHT

Trend Insight is a new feature in *Outdoor Insight* that includes consumer research and retail point-of-sale data from The Leisure Trends Group. Data in this issue's report are based off of Leisure Trends Group's LeisureTRAK® report. The LeisureTRAK report is developed from a quarterly poll of 1000 American adults ages 16 and over. The results are projectable to the U.S. population. With over 20 years of historical data, the LeisureTRAK report is the definitive source for information about Americans at play. For more information on Leisure Trends Group or its LeisureTRAK report contact Julia Day at 303-786-7900 ext. 107 or jday@leisuretrends.com. For additional information on Trend Insight, contact Jeff Nott at 516-305-4711 or jnott@formula4media.com.

sales this season, but they were also able to move through more of their inventory this year. Across the entire country, outdoor specialty retailer's sell-through stood at 85% at the end of April, up from 82% at the end of April 2009. While retailers in the West and the Midwest were dead even with last year at this time, retailers in the South benefitted from a record-breaking cold winter and ended the season 85% sold-through, up from 77% at the end of April 2009.

However, Stahura cautions against putting too much emphasis on weather, as it is not the only factor in seasonal products' success or failure. "In the Northeast, where we saw record-breaking warm temperatures in the beginning of 2010, retailers still managed to move through their winter boot inventory. They ended April 90% sold-through, more than anywhere else in the country and up eight points from 82% at the end of last April!" ●

Winter Footwear Headline

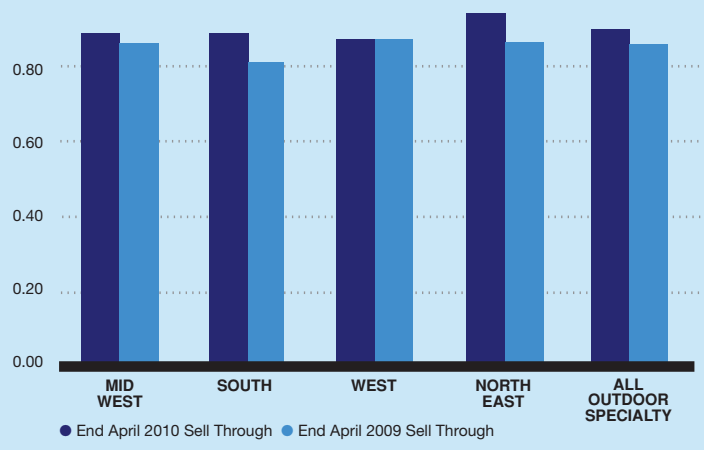
Winter Boots: Outdoor Specialty Sell Through

	End 4/09	End 4/10	Change
Midwest	0.84	0.84	0.00
South	0.77	0.85	0.08
West	0.83	0.83	0.00
Northeast	0.82	0.90	0.07
All Outdoor Specialty	0.82	0.85	0.03

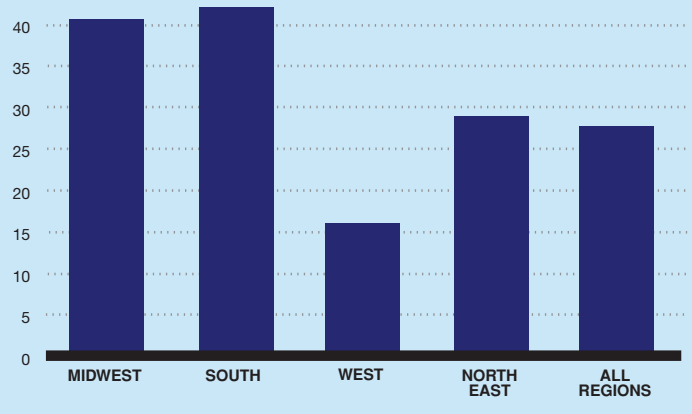
Winter Boots: Outdoor Specialty Dollars Sold

	1-4/09	1-4/10	Change	Growth
Midwest	1,667,679	2,345,372	677,693	40.64%
South	3,199,182	4,543,208	1,344,026	42.01%
West	5,697,611	6,599,944	902,333	15.84%
Northeast	2,171,803	2,799,132	627,329	28.89%
All Regions	12,736,274	16,287,655	3,551,381	27.88%

Winter Boot Sell-Through



Winter Boot Dolar Growth 4/09 vs. 4/2010



Summer Footwear Headline

Percent of Total Outdoor Specialty Footwear Dollar Sales by Category*

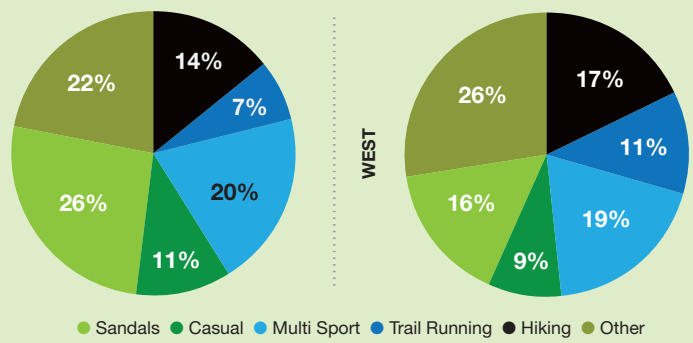
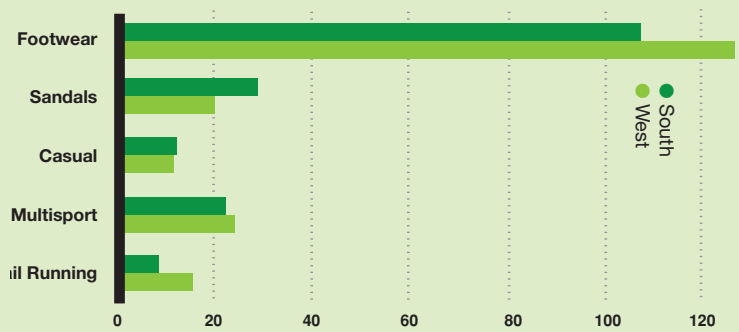
	South	West	All Regions
Hiking Boots	14.32%	17.58%	15.57%
Trail Running Shoes	7.16%	11.62%	8.02%
Multisport Shoes	20.13%	18.73%	17.88%
Casual Shoes	10.97%	8.83%	10.38%
Sandals	26.26%	15.55%	18.93%
Other	22.00%	26.00%	
Footwear	100.00%	100.00%	100.00%

West And South are Strongest for Footwear Sales

	West	South
Hiking Boots	$22,115,584	$15,317,536
Trail Running Shoes	$14,621,726	$7,663,327
Multisport Shoes	$23,562,210	$21,531,550
Casual Shoes	$11,108,031	$11,736,982
Sandals	$19,557,938	$28,094,768
Footwear	$125,789,229	$106,968,010

*Based on Rolling Year 2010 Dollars Sold: May 2009 - April 2010

Footwear Dollars Sold RY 2010



Good Total Dollar Sales RY 2010