



LAYING UP THE FRESHNESS AT THE ELAN FACTORY—DIRECT FROM AUSTRIA TO SIA. PHOTO: LEWIS

2012/13 SNOWBOARD MARKET AND TREND REPORT

YOUR GUIDE TO NAVIGATING THOUSANDS OF PRODUCTS AND HUNDREDS OF BOOTHS

By Michael Sudmeier

We originally hired a dart-throwing monkey to better understand the trends and developments shaping the snowboard industry for the 2012/13 season. Unfortunately, his focus failed to move beyond bananas and circus tent technology. So we had to go with Plan B: a comprehensive, data-driven analysis of product offerings and market trends. We interviewed over 140 brands and dozens of retailers to better understand what the future has in store. After pouring over 600 pages of interviews, studying thousands of products, and crafting a few too many spreadsheets, we've distilled emerging product and market trends into a few pages. So kick back, slide on the slippers, and rock the reading glasses to better understand what to expect heading into SIA.

THE NEW VALUE

As consumers arm themselves with information, they are increasingly looking for value over the lowest price possible. Dakine Sales Manager Chico Bukovansky notes, consumers "expect value now more than ever. Not inexpensive product, but value." Consequently, brands are offering more sophisticated fabrics and technology in their outerwear and infusing boards and bindings with features once limited to their premium offerings. "We are seeing that no matter the retail price of something, if customers can see the value and benefit of the more expensive items, they are purchasing them," offers Jon Eason, owner of Blindside in Colorado Springs.

PREMIUM PRODUCTS DRIVEN BY INNOVATION

The search for value is causing customers to open their wallets and reward innovation. "We are seeing quite a few first-time products to the market and now, more than ever, the items with a legitimate story are selling themselves," Eason adds. For boards, these developments include new construction approaches such as Flow's Augmented Base Technology, which aims to create a smoother ride by placing a layer of silicone between a board's base and core. New binding brands are challenging paradigms with innovative designs. NOW, for example, has developed a binding

modeled after skate trucks, featuring interfacing parts that pivot and customizable bushings to maximize energy transfer and shock absorption. At Eastern Boarder, Snow Buyer Herb Grignon has seen a rising demand for premium boots, offering waterproof and breathable membranes, sophisticated soles, and discipline-specific designs. For optics, frameless technologies, interchangeable lens systems, and new lens materials will inspire consumers to upgrade their goggles. Informed by developments in the outdoor industry, outerwear brands are relying on more technical fabrics and an increased focus on breathability.

LIGHTENING UP

When it comes to hardgoods, evolution continues to be measured in ounces. As Union Team and Marketing Director George Kleckner reveals, "Pretty much every company is working on making lighter weight products." Burton, for example, will unveil its lightest board ever, the Mystery. On the binding front, brands are slimming down the amount of material used in construction, relying on titanium hardware, and even eliminating traditional forward lean adjusters and all but the sides of highbacks. Boots are using softer foams and slimmer soles to reduce weight and enhance board feel.

CLASSIC STYLING

Brands are moving forward by looking back. For the 2012/13 season, expect softgoods steeped in heritage and informed by classic outerwear, Western wear, workwear, and military fatigues. According to Westbeach Head Designer Laura Bentley, this has yielded "masculine, rustic-looking collections" and slimmer, refined fits. These products often blend classic fabrics—wool, canvas, and denim—with new technology to provide waterproofing and breathability. This classic styling is also shaping boots, where subdued designs take a cue from classic footwear and outdoor gear.

QUIETLY GOING GREEN

"Companies will throw a blade of grass into a barrel of oil and market that as environmentally friendly," warns Stepchild Marketing and Design Director Sami Shams. Consequently, brands concerned with minimizing their environmental footprint are reaching beyond bamboo and reassessing their entire operations. Companies are increasing efficiency and reducing waste through innovations in manufacturing and logistics and efforts to keep production close to consumers.

On the sales floor, materials continue to serve as tangible evidence of brands' efforts to reduce their impact. For both boots and outerwear, brands are turning to fabrics and insulations derived from recycled plastic bottles, coffee grounds, and other post-consumer content. Responsibly harvested renewable resources like hemp are being used to craft both soft and hardgoods. Some manufacturers are foregoing fiberglass for basalt and replacing glossy topsheets made from toxic substances with alternatives that use castor beans or digital printing technology. Flip flop bases and wood cores that use finger jointing also aid in reducing impacts.


A NEW SEASON AND NEW OPPORTUNITIES

Whether riders are lapping the bunny hill or dropping lines in Alaska, new products aim to better meet their needs. And increasingly, these products are catering to emerging market segments, such as women, children, freeriders, and splitboarders. With new technology and demographics, retailers have their work cut out for them. Fortunately, brands continue to expand their assistance. From stronger incentives and sales support to increased efforts to engage customers, brands are working to form meaningful partnerships with their retailers. With snow falling and registers ringing, there's plenty of reasons to smile.

AWARDING INNOVATION

EIGHT MUST-SEE NEW PRODUCTS

By Michael Sudmeier

 ur Editor's Picks highlight excellence in design and innovation. After researching literally thousands of products debuting at SIA, we are proud to showcase eight that stood out from the crowd. From boards with silicone implants to vests equipped with the ABS system, many of these products reinvent our understanding of equipment. Others, such as guide-driven outerwear, take proven technology to the next level. All of them demand attention.

FLOW MAVERICK ABT

It's time to make an amendment to Sir Mix-a-Lot's assessment that "silicone parts are made for toys." At SIA, Flow will reveal its Augmented Base Technology (ABT), which places a layer of silicone between a board's base and core. Located between the inserts, ABT offers a smoother ride by dampening vibrations and allowing the base to move up to two millimeters up or down. Despite these implants, boards like the Maverick ABT are more at ease on the slopes than in the company of plastic surgeons.



CONTOURROAM

Point-of-view cameras have taken the industry by storm. Contour's latest camera, the ContourROAM, blends innovation and affordability. In case riders land in creek beds, the camera can record in up to a meter of water for 30 minutes. It also offers a one-touch record switch, the ability to record in HD with three resolutions, and a lens that can rotate 270 degrees. To ensure proper mounting and level shots, the camera shoots a horizontal laser line.



DEELUXE VELVET LARA



With boots like the Velvet Lara, Deeluxe is helping drive two major developments in snowboard footwear: the movement toward softer, skate-influenced boots and the increased focus on women's feet. This premium boot offers a waterproof, breathable membrane, low-profile sole, and construction technology that fuses the liner to the shell. This approach shaves 1.5 centimeters off of traditional boot lengths and places a rider's foot eight millimeters closer to her board.

DRAGON APX GLACIER GLASS



With Dragon's APX Glacier Glass, you can explore the backcountry of Alaska or take a journey down Rodeo Drive. Don't be deceived by the sleek wire frame, these glasses are ready to brave the harshest elements thanks to removable leather side shields, an adjustable silicone nose pad system, and Performance Polar Lens technology. This technology protects the glasses from fogging, scratches, and damage from oil and water. With the Dragon Glacier Glass, you can avoid snow blindness with style.

VOLCOM GPT

Built for abuse, Volcom's Guide Proven Technology (GPT) allows riders to save a small fortune on duct tape. Featuring the durability of three-layer Gore-Tex and a minimalist design, this series is cut to aid movement and remain functional when constricted under harnesses or heavy packs. Although the inspiration and product testing for the series comes via the guides at Baldface Lodge, you don't have to hold clients' hands to benefit from GPT.



BURTON MYSTERY

Brewed in Burlington, the Mystery is the first production model originating from Burton's in-house prototype shop, Craig's, and its lightest board ever. The facility opened last year and allows the brand to create new binding parts and boards and test them on the snow within 24 hours. After perfecting new technology at Craig's, Burton shares these developments with its manufacturing partners around the globe.



THE NORTH FACE POWDER GUIDE ABS VEST

Traditionally, the life-saving ABS system was available only in packs. With the debut of its Powder Guide ABS Vest, TNF brings it to apparel. If caught in an avalanche, a rider can pull a handle to inflate two airbags, offering flotation and visibility. The handle is attached only when you're riding so you can avoid tram-deployments.



NOW IPO

NOW is aiming to reinvent binding technology with the IPO. Influenced by skate trucks, the binding forgoes traditional baseplates. Instead, it uses a series of interfacing parts capable of pivoting to maximize energy transfer and vibration dampening. A forged, CNC'd aluminum disc and stamped Alumi-Ring provide a mounting system concealed by a nylon hanger. A stainless steel hollow rivet and washer known as the Kingpin connect the hanger with the mounting system, allowing the binding to float freely on four customizable bushings. After six years of prototyping, the brand feels that NOW is the perfect time to launch.



TRENDS & TIPS TO GUIDE YOUR TRADE SHOW BUY

TOP SHOPS SHARE WHAT'S CATCHING THEIR EYE

By Michael Sudmeier

THE LINEUP:



TODD CANIPE
Owner, Vertical Urge
Raleigh, North Carolina



SCOTT ORESCHNICK
Owner, Cal Surf
Minneapolis, Minnesota



HERB GRIGNON
Snow Buyer, Eastern Boarder
Massachusetts and New Hampshire



JON EASDON
Owner, Blindsight
Colorado Springs, Colorado



ADAM GERKEN
Co-Owner, Snowboard Connection
Seattle, Washington



COLIN EDWARDS
Snowboard & Skate Buyer
Dogfunk.com
Park City, Utah



EDWARD M. "DUKE" EDUKAS
Owner, Surfside Sports
Costa Mesa, California

What category's sales surprised you last year and how?

CANIPE: This might sound crazy, but boards. We sold a *ton* of snowboards last year. Other than that, I would say we blew through some novelty categories like face masks and bandana's faster than we would have ever anticipated.

ORESCHNICK: In softgoods, I sold pants two-to-one over jackets. The great thing about Minnesota is the tow rope parks and tons of great street spots. The negative, as a retailer, is that if you cater to those riders, they're not going to be buying much in the way of jackets.

EASDON: We experienced an insane sell-through on socks. We order a very high quantity of snow socks on prebooks, but we had to go back to our vendors and reorder several times. Definitely a strange category to explode, but it did just that.

GERKEN: We were blown away by binding sales last year. There was so much energy with Union and Burton—we had a difficult time keeping up with demand.

EDUKAS: Two things really stood out to me. First; GoPro cameras and accessories sales blew my mind! We had a new category that kicked ass like I've never seen before. Second, Burton came back strong, really strong, in almost every category. Snowboards, boots, and EST bindings killed it. Lib and Never Summer were dominating two years prior. I always knew Burton would catch up, but I didn't think it would be this fast. Lib and Never Summer still kill it, but so does Burton.

What products have been moving well this season?

CANIPE: We've seen early success in Burton hardgoods across the board—especially boards in the mid-range price category like the Process V-Rocker and Hero.

ORESCHNICK: So far boots above \$200, boards \$450-\$550, and bindings around \$200 have been the best sellers.

GRIGNON: Bindings are always an early season strong seller for us, as well as "limited" boards and some specialty outerwear pieces.

EASDON: Technical hoodies seem to be sparking a lot of interest. Lightweight, waterproof pieces are moving well.

GERKEN: We are having a lot of success with Burton Ions, K2 Darkos, and all the Nike boots are selling well. For boards, the Capita Indoor Survival, the Lib Tech Travis Rice Horsepower, and the Burton Custom Flying V Restricteds and Nugs have been selling quickly. On the binding front, we are seeing a lot of demand for Burton, Union, and the K2 Cinch.

What's the new rocker, or is rocker still the new rocker?

CANIPE: Rocker is still the new rocker. We're seeing camber/reverse camber combos performing best, as well as a few, and I stress a few, customers coming back around and looking for a camber board.

ORESCHNICK: Many of our customers that have ridden rocker are going back to camber boards. So, maybe camber is the new, old thing.

GERKEN: The new rocker is "blended rocker." We have had really good success with boards that have a blended rocker story—whether it be Lib and Gnu's C2, Capita's "Freeride FK", Burton's "Flying V", Yes' CamRock, or whatever—people are digging it.

EDWARDS: Anything but traditional rocker. The majority of our sales are going toward hybrid and flat. Camber is making a comeback too.

At SIA, what do you think you'll be watching closely?

CANIPE: What I'll be watching more closely than last year at the upcoming SIA is my budget. Coming off a year like we had last year [in North Carolina,] I think we weren't cautious enough

IN ORDER TO ENSURE OUR BUYING DIRECTION IS CORRECT FOR WINTER '13, I WANT TO MAKE SURE THAT THE INDUSTRY IS HEALTHY AT SIA. —EDWARDS

with our buys. That will change this year, no doubt. Having a slower start to the sales season than you anticipated always sobers you up a bit! We'll also keep an eye on the industry's ever-shifting stance on rocker options and camber. That could be a big story to watch evolve over the next couple years.

ORESCHNICK: My program has stayed pretty consistent the last few years. I will load up on the brands that offer me the best chance to sell through at a healthy margin while offering a premium product. My guess is I will have more camber boards than I am carrying this year.

GRIGNON: The usual, looking for smaller brands, the next "cool" company, they're only cool for a year so you have to capitalize on it!

EDWARDS: The overall feel and vibe. Last year was great because everyone had sold through really early in the season. In order to ensure our buying direction is correct for Winter '13, I want to make sure that the industry is healthy at SIA.

EDUKAS: We will responsibly analyze the reports we generate, just like we've done in previous years. Resist overzealous vendors trying to convince us that we're always going to get as much early-season snow as we did last year, and pray to God that the manufacturer's don't start over producing once again.

THE GOODS AT A GLANCE

GEARING UP FOR DROPPING CLIFFS NOTES

By Michael Sudmeier

METHODOLOGY OVERVIEW

To better understand what the future has in store for the industry, we abandoned crystal balls to focus on a comprehensive, data-driven analysis. We interviewed more than 140 brands and dozens of retailers, sifted through 600 pages of responses, examined thousands of product images, and poured over stacks of spreadsheets to identify emerging trends. Thanks to our notes, you can skip the required reading, still attain an A in market research, and head straight to dropping cliffs.



OUTERWEAR

Fit Driven By Function—Tailored fits continue to yield pants that are slimmer and jackets that are longer.

Classic Styling—Classic styling and subdued color palettes are prevalent in outerwear as brands find inspiration in workwear, military garments, and classic outerwear.

Tradition With A Twist—To offer both style and protection from the elements, brands are pairing new technology with traditional weaves and fabrics, such as wool, denim, and canvas.

Anti-outerwear—Riders are embracing streetwear with technical features, giving birth to an emerging product category that includes sophisticated hoodies, lightweight shells, and button-ups.

Technical Fabrics—Brands are taking a cue from the outdoor industry, incorporating advanced technical fabrics into their outerwear and paying greater attention to breathability.



BOARDS

The NeverEnding Camber Story—Camber stories still dominate discussions on the sales floor. Hybrid cambers are gaining momentum, while cambered boards are making a slight comeback.

Emphasizing Interactions—Brands are placing a greater emphasis on how symmetry, shapes, camber stories, and core profiles interact to influence board performance.

Technology With Reduced Impacts—Manufacturers are reducing environmental impacts by replacing fiberglass with basalt, crafting topsheets with castor beans or digital print technology, and using flip-flop bases that minimize waste.