

TREND REPORT

2013/2014 Snowboard Market And Trend Report

By Michael Sudmeier

To better understand what the 2013/2014 shred season has in store, we intended to rely on cryptic prophecies. Unfortunately, we had to abandon this approach due to a recent strike among soothsayers. Left with little alternative, we rolled up our sleeves and dived head first into data. We interviewed 130 brands and dozens of retailers to identify emerging product and market trends. After examining 600 pages of interviews and sacrificing our eyesight to spreadsheets, we've distilled our findings to just a few pages. And although the Mayan calendar expires in 2012, we still intend to be shredding next season.

RESTRAINT AND REFINEMENT

In much of North America, last year's snowfall was measured in inches—not feet. And with warmer-than-usual temperatures, a lackluster winter led to lackluster sales and grandiose inventories. Yet the surplus of product left at retail is serving as a catalyst for change. “Everyone from brands to shops has re-evaluated what is important and necessary for their business,” Niche Vice President of Sales and Marketing Tim MacKenzie offers. “I think the last year will really show who is adapting and who will survive this evolution.”

As part of this evolution, brands are tightening their collections and streamlining their stories. “A good overall collection isn't enough anymore,” K2 Sales Manager Eric Hutchison reveals. “All your models need to be strong individually because more and more dealers are just buying the home run models from the brands they carry.” This shift has helped usher in an era of incremental improvement. Consequently, some of the most impressive products for next year are refined classics rather than game-changing goods. After all, explains Vice President of Anon and Burton Hardgoods Scott Barbieri, “Customers are looking for authenticity, durability, and value—stuff that works.”

NAILING THE NICHE

Although participation dipped more than seven percent last season, growth continues to occur in certain market segments. For Warren Currie, owner of The Easy Rider in Edmonton, Alberta, one of last year's highlights was “the huge growth in backcountry gear.” The industry has also witnessed an increasing demand for children's gear, premium women's products, and decks designed for deep pow. In addition, a number of brands and retailers are increasing their emphasis on rentals and premium demo products.

As part of their efforts to address emerging niches, brands are focusing heavily on discipline-driven designs.

“The snowboard industry has been very focused on creating hardgoods that are specific to one type of terrain and riding style,” Nitro Marketing Manager Knut Eliassen offers. This is especially true with boards and boots, where brands have enjoyed solid sales with niche products like those built for splitboarding or urban riding.

SHAPES AND SYNERGY

From blunt-nosed street decks to reverse sidecut pow surfers, brands are debuting an impressive range of shapes. “Board shaping continues to be an ongoing story and is something visual that consumers can actually relate to and understand,” Ride US Sales and Marketing Manager Shawn Penrod offers. As part of this trend, explains Capita Product Development and US Marketing Manager Sean Tedore, “Standard nose and tail shapes have been replaced by models that have their own unique identity.”

Yet board shapes are just part of the story. Manufacturers are continuing to tinker with camber profiles. This has led to a slight revival in cambered decks, as well as an increase in hybrid profiles that emphasize camber. And although camber profiles continue to garner significant attention, the conversation surrounding board

technology is evolving. Manufacturers are placing a greater emphasis on how board shape, symmetry, camber stories, core profiling, and composite layups interact to influence board performance. Consequently, boards are being promoted on the sales floor not on the basis of their camber, but on their intended purpose.

OUTERWEAR EVOLUTION

There's “a split in the appearance of outerwear—either it is wild style, brightly colored, and an obvious snowboard jacket, or it is understated and street-inspired,” Bonfire Design Director Kate Darnall reveals. On the wild side, brands are using rich, saturated colors, color blocking, and simple prints. For more subtle collections, brands are finding inspiration in workwear, woodsmen, and vintage outdoor equipment, leading to collections that blend textured fabrics with technical features.

Despite these disparate approaches, most brands have renewed their focus on fit. Relaxed, slim fits continue to dominate the market, but many brands are offering a range of silhouettes—especially for females. The growing interest in backcountry riding is also informing fit and function across garment collections. Brands are debuting longer jackets, articulated cuts, and fabrics that stretch and emphasize breathability.

And although the backwoods and the backcountry continue to inspire collections, the influence of the streets is as strong as ever. As Volcom North American Sales Director Brad Albland notes, “Dual purpose pieces are taking over the sales floor.” Riders are depending on technical streetwear like flannels, hoodies, and lightweight jackets both on the snow and around town.

MOVING FORWARD

Although Mother Nature will always have the final say over sales, the industry is adapting to her whims. This is leading to both stronger partnerships and efforts to expand participation. Citing a desire to grow pre-existing accounts rather than open new doors, many companies are working to support retailers through better terms, tighter lines, and enhanced customer engagement. To share the stoke and get new riders addicted, brands and retailers are also partnering with nonprofits, offering products that ease the learning curve, and supporting learn-to-shred events. Despite uncertain times, many brands and retailers are optimistic. As Owner Operator Co-founder Steven Kimura puts it, “There are lots of opportunities for innovators with the right moves.”



Building boards is a labor of love in the Rockies. Venture Production Technician Andrew Parker gears up for another winter of romance.

PHOTO: SCOTT DW SMITH

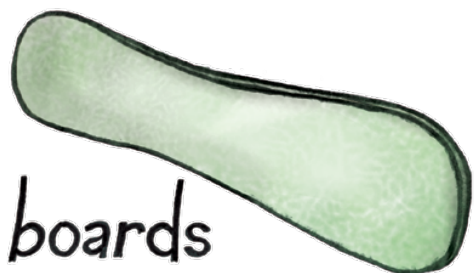
The Goods At A Glance

2013/14 Snowboard Gear And Market Cheat Sheet

By Michael Sudmeier

METHOD TO THE RADNESS

To understand what's on tap for next year's gear, you could turn to Magic 8 Balls, fortune cookies, and Ouija boards... or you could take a peek at our cheat sheets. Stemming from a comprehensive, data-driven analysis, these notes identify key trends in the shred industry. We interviewed 130 brands, reached out to dozens of retailers, combed through 600 pages of responses, and examined countless product images to identify emerging trends. Thanks to these simple notes, you can get a solid sense of what to look for at SIA—without turning to psychics and spreadsheets.



SHAPE STORIES Whether enhancing float in powder, maximizing pressability on rails, or just looking good, board shapes are enjoying greater attention. Rounded tips and tails are the new old school.

NAILING THE NICHE Manufacturers are tapping into new niches, resulting in increased offerings of pow surfers, premium ladies' boards, and decks for little rippers. These niche products also include cambered decks, which are experiencing a slight uptick in demand.

SKATE TECHNOLOGY For street-driven jib sticks, brands are appropriating technology from skate decks. Look for stacked, wood-ply cores, and sidewalls.

THE WHOLE ENCHILADA Brands are continuing to emphasize how symmetry, shapes, camber stories, core profiles, and composite layups interact to influence board performance. Consequently, brands and retailers can de-emphasize camber stories on the sales floor in favor of focusing on a board's intended purpose.



A NEW PARADIGM Brands and retailers are diversifying their boot offerings to emphasize discipline-driven designs instead of products simply based around flex and price tiers.

DON'T CALL IT A COMEBACK Classic lacing is enjoying a steady resurgence. Nonetheless, zonal lacing—and a combination of closure options—continue to dominate the market.

SEAM WELDING By using new fabrics and welding (rather than sewing) seams, brands are creating lighter boots that flex more naturally. In addition to shedding weight, these boots shed production costs and maximize margins.

STREET-DRIVEN STYLE When it comes to boots, expect aesthetics informed by skate shoes. But there's more at work here than steez—these boots often have low-profile soles that offer enhanced board feel as well.



RELENTLESS REFINEMENT

Consider this the year of incremental improvements. Brands are reducing the footprint of baseplates, expanding canting options, and refining their straps. The objectives: decrease weight, improve comfort, and enhance board feel.

FOCUS ON THE FLEX

Highback flex and support are basking under greater attention as brands turn to new materials and construction techniques to drive innovation.

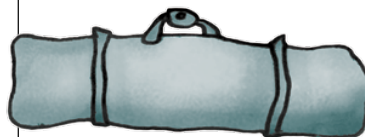


A CACHE OF COMPARTMENTS

Coffin-like board bags are being replaced with designs built around carefully considered compartments. These pockets aim to keep things organized and protected, while also allowing wet gear a chance to breathe.

EMPHASIZING THE OVERHEAD

When it comes to luggage and travel packs, riders are demanding products that fit in the overhead compartment. Yet many of these bags are capable of expanding their volume once the plane lands. For riders who prefer to travel sans bags, board bags have also been streamlined to allow for easy shipping.





Outerwear

COUNTLESS CUTS Although relaxed, slim fits continue to dominate the market, many brands are offering collections with a range of silhouettes. Among these diverse cuts, expect longer jackets and a refined approach to women's fit.

BUILT FOR THE BACKCOUNTRY Inspired by life outside the access gates, brands are focusing more on articulated fits, as well as pockets and vents that don't interfere with packs. They are also turning to technical fabrics that stretch and offer enhanced temperature control, especially with regards to breathability.

DOUBLE DUTY To maximize value and meet the demand for technical streetwear, brands are placing an emphasis on clothing that can handle shred and après sessions equally well.

THE CLASSICS CONTINUE Brands continue to draw inspiration for their collections from work wear, vintage outdoor equipment, and lumberjacks. This yields outerwear with an emphasis on subtle style and collections built around textured fabrics like denim, twill, tweed, and canvas. Anticipate interesting trims.

PROVIDING POP On the other end of the spectrum, brands are packing a punch with rich, saturated colors, simple prints, and color blocking. Brace yourself for colors like acid green, chili red, and sapphire blue, as well as prints based around floral, ethnic, tie-dye, and fictitious animal patterns.

RAD PADS Brands are refining the padding systems found in their helmets. Customizable pads offer four-season flexibility, as well as the option to wear goggles and a beanie beneath brain buckets.

THE CERTIFICATION STORY

Consumers are closely examining helmet certifications, seeking out lids that offer stamps of approval for a range of sports.



Helmets

PREMIUM PERFORMANCE, PREMIUM PRICE Quick-release interchangeable lenses? Oversized frameless designs? Polarized and photochromic lenses that adjust their tint in response to changing light conditions? Yep, riders are shell-ing out cash for premium optics and brands are bringing it.

NERDING OUT Increasingly, brands are developing goggles that blur the boundaries between high-end optics and consumer electronics. These goggles rock GPS and Bluetooth technology, as well as heads-up displays that can provide information like speed, altitude, temperature, and resort trail maps. Some of these goggles even sport POV cameras.

CLASSIC COMEBACKS Perhaps as a backlash to these other trends, some brands are offering a healthy dose of classic designs that rely on cylindrical lenses. But don't be deceived by their simple appearance—many of these goggles are packing high-end optical performance.

Goggles



Beyond The Products

ENHANCED ENGAGEMENT Brands are leveraging social media campaigns, team films, and in-store events to expand their footprint, increase communication with customers, and direct riders to specialty retailers.

LEAN AND MEAN In the wake of last year's lackluster snowfall and conservative orders, brands are tightening their forecasting and production. As part of this process—and to ensure on-time shipment—manufacturers continue to move up order deadlines.

PREMIUM DEMO PROGRAMS Brands, retailers, and resorts are focusing on premium demo equipment. This provides new opportunities for sharing the stoke, a sales funnel for future customers, and a means for riders to try niche products like split-boards and pow surfers prior to purchase.

ORGANIC GROWTH Organic growth is a common refrain among brands looking to expand their product lines—and incentives—amongst pre-existing retail accounts.

REDUCED IMPACTS Whether reassessing production and logistics, repurposing ingredients, or tapping into recycled and responsibly sourced materials, brands are working to reduce their environmental impact. According to many of these brands, building products that last is the best way to reduce their impact.

PROMOTING PARTICIPATION From partnerships with nonprofits to gear for grommets, brands are investing in programs that share their love of shred with new crowds.

MUST-SEE NEW GEAR



K2 ENDER ▲

Despite its name, the Ender is just the beginning. Through its Endo construction, K2 is reimagining how boots are built and how they perform. In place of stitch lines and flex panels, the Ender uses a urethane endoskeleton to provide a consistent flex and fit throughout the boot's life. The boot rocks a Boa CONDA closure, which tightens around the liner to lock ankles in place, and marries the classic good looks and proven performance of traditional laces. Raise some hell in this freestyle fiend.



SALOMON JOSH DIRKSEN COLLECTION ►

Josh Dirksen knows a lot about riding pow. Salomon knows a lot about making boards. With powers combined, they've developed a quiver of decks designed for going deep. Many of these boards, which include splits and solids, rock Salomon's new Backseat Camber, offering extra floatation. Along with Salomon's legendary Sick Stick, the collection includes the all-mountain Rancho and the Derby, a deck built for laying down crisp turns on super deep days.



◀ VOLCOM HR&S

Originally designed to meet the needs of urban explorers, Volcom's Hand Rails & Shit collection can be appreciated by anyone. As technical streetwear, these jackets, flannels, and hoodies are built for life on the snow and in the streets. With features like longer cuts and Volcom's signature 2-Way Cuffs and Zip-Tech, these garments ensure riders stay warm, dry, and looking good.



Arbor Draft Nick Visconti Edition

Made of responsibly sourced Eucalyptus Burl wood, the Arbor Draft's topsheet reduces weight while providing pop. The Draft's parabolic rocker creates a playful ride, and its Grip Tech sidecut increases control. To make a killer deck even bet-

ter, it sports Arbor's new Wood Power Walls, which rely on six stacked plies of maple. Like the skate decks that serve as their inspiration, these sidewalls can take a beating, absorb bad vibes, and provide a snappy return.



GNU BEAUTY ►

Designed to be a female freerider's best friend, this directional deck sports Magne-Traction and C3 BTX. With a long nose and slight rocker—or Banana Tech—between the feet, the board provides float in pow and a playful freestyle feel. Thanks to camber in the rest of its profile, the Beauty also offers stability and a crisp ride. The deck's looks are compliments of a collab with Pendleton. Through its recent projects with Mervin and Bonfire, the iconic brand continues to build a strong presence in the shred scene. Blankets have never looked better.



OAKLEY AIRWAVE ▲

The Oakley Airwave fuses consumer electronics with high-end optics. The result is a lovechild worth embracing. Providing a range of information through a heads-up display that riders control via remote, data such as location, altitude, speed, temperature, and jump analytics are

paired with the ability to screen and answer calls and control your tunes. To adapt to changing light conditions, the Airwave features Switchlock for rapid lens swaps. Despite all of these features, the goggle still enables you to do simple things—like see the slopes.



◀ BURTON GENESIS

Since its debut, the Genesis has made riders drool and their feet smile. Nonetheless, Burton has continued to refine it—making a great binding even better. The Kickback Hammock features an inner and outer highback that are separated by a spring, offering a plush yet responsive ride. Burton's new Hammockstrap adds to the comfort without the toxic materials traditionally used in straps. A minimalistic, cored-out baseplate and hinged disc shed weight and maximize board flex and feel. If you're looking for laidback luxury with powerful performance, your Cadillac has arrived.



◀ AIRBLASTER SASQUATCH

For its 10th anniversary, Airblaster is resurrecting the Sasquatch collection, featuring limited edition, hand-numbered outerwear for men and women. To minimize impact on the environment, these garments use upcycled, recycled, and renewable materials. The collection will only be available through a select group of retailers that have backed Airblaster since its early days. Needless to say, Sasquatch sightings are worth celebrating.