

# DÉJÀ NEW

## SMOOTHING OUT THE ROAD AHEAD WITH LESSONS FROM SNOWBOARDING'S PAST

By Michael Sudmeier

Last year, riders and retailers kept waiting for snow to fall. In most places, it barely did. Rather than measuring snowfall, ski areas measured the growth of grass. And rather than making sales, retailers marked down prices.

Although we can't conjure up snow, we can tell you how the industry is responding to the lack of it. And although we can't make a surplus of products disappear, we can tell you how inventory is impacting next year's goods. To better understand what the future has in store, we conducted a comprehensive, data-driven analysis of product and market trends. We interviewed more than 130 brands and dozens of retailers. After poring over 600 pages of interviews, thousands of product images, and countless spreadsheets, we distilled our findings to just a few pages. So kick off your boots, grab a hot cocoa (or toddy if you prefer), and settle in by the fire—it's story time.

### OPPORTUNITIES FOR INTROSPECTION

"Mother Nature ultimately decides what sells in this business," Arbor Marketing Director Brad Farmer explains. This was especially true last season, as snowboard sales were down seven percent in units sold and four percent in dollars compared to the 2010/2011 season. During the same period, snowboard apparel sales were down 12 percent in both dollars and units sold.

Straddled with a surplus of product, the industry has had ample opportunities for introspection. "Everyone from brands to shops has really re-evaluated what is important and

necessary for their business," offers Niche Vice President of Sales and Marketing Tim MacKenzie. "I think the last year will really show who is adapting and who will survive this evolution." As part of their efforts to adapt, brands are streamlining stories and tightening lines. "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." Consequently, brands and retailers are placing a greater emphasis on refined classics rather than game-changing gear. As part of their efforts to adapt, they're also tapping niches for new opportunities.

### NAILING THE NICHE

Increasingly, products are becoming as diverse as the riders who depend on them.

"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 reveals.

This has led to a range of discipline-specific decks, including products built for the streets, backcountry, and deep pow. To meet the needs of urban explorers, manufacturers are offering cores and sidewalls that feature horizontally laminated plies of wood similar to skate decks. Brands and retailers are also expanding their offerings for those in search of deep snow. As zAKs Boardroom Co-Founder Travis Anderson states, "Splitboards and backcountry accessories are growing because of the new technology, more user-friendly designs, and [focus on] the terrain accessible only by foot." In addition to splitboards, brands continue to refine decks designed for the deepest days. Some of these boards sport reverse sidecuts and can be ridden without bindings.

The rise in discipline-specific designs is creating a new paradigm for boots. Historically, boots have been sold on the basis of their flex and price tag. Brands and retailers, however, are placing a greater emphasis on providing boots built for specific terrain. For street-driven boots, brands are offering softer foams and thinner soles that offer enhanced board feel. Brands are also refining boots for the backcountry. In addition to a stiffer flex, these boots tend to feature waterproof and breathable membranes, as well as soles built for hiking, splitboarding, and sporting crampons.

Brands are also developing products that respond to shifting demographics. As Mervin Co-Founder and Creative Director Pete Saari explains, "Snowboarding has become more of a timeless pursuit, pushing on both sides of the age spectrum." And although participation dipped over seven percent last shred season, growth continues to occur in certain market segments. "We were taken by surprise on how many girls came in the shops for mid- to high-end products last year," Empire Owner Phil Grisé offers. In addition to an increased interest in premium women's products, brands and retailers are also responding to a growing demand for products geared toward younger riders.



### 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 better, 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.



## FOCUS ON THE FEET

Next year's boots and bindings tend to be the result of continual refinement rather than game-changing technology. Much of this refinement has been aimed at addressing fit and comfort. "Fit drives everything in boots," explains Rome International Sales Manager Dan Sullivan. Consequently, brands are tapping into a range of fabrics, foams, and closure systems to enhance their liners.

Companies are also working to refine their lacing systems. "A complex, multiple-tiered approach to lacing systems seems to be one of the biggest trends in boots," offers Salomon Product Line Manager for Boots Nina Ericksson. Many of these systems rely on zonal lacing, which can aid in addressing the fit and flex of a boot. Increasingly, these lacing systems aim to hold heels in place. To accomplish this, brands are tapping into everything from internal lacing harnesses to new applications of BOA. According to Vice President of Anon and Burton Hardgoods Scott Barbieri, "Technologies focused on improving heel hold are another trend currently hitting the market." Despite these sophisticated approaches to lacing systems, traditional laces are enjoying a slight comeback.

To improve a boot's performance—and potentially lower its price—brands are turning to emerging construction techniques. "Everyone has their version of the unibody construction—or one-piece shell design—that helps reduce weight and maintain durability," explains Flow Product Line Manager for Boots Alex Zhao. Some brands are reimagining how a boot should flex. Rather than relying on flex panels and stitch lines, K2 is using a urethane endoskeleton to dictate flex for some of its boots.

As with boots, brands are over-

## 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.



hauling bindings to improve comfort and performance. To enhance board flex and feel, manufacturers continue to streamline baseplates—often by reducing their footprint, coring out material, and relying on hinged mounting discs. Consequently, brands are placing a greater emphasis on footbeds, loading them with sophisticated features like canting and gel pads. As part of their efforts to develop terrain-specific bindings, brands are also enhancing their highbacks by focusing on the support and flex they offer. This has led manufacturers to develop new pairings of familiar materials, like carbon fiber and urethane. Companies are also expanding their rear-entry offerings and working to reduce their impact on the environment. "Our binding process produces no manufacturing waste as all trim and [traditional] waste can be reground and reused," Barbieri offers. Efforts to minimize environmental impacts have also led Burton to develop its new Hammock Strap, which forgoes EVA and PU foam.

## 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 minimalist, cored-out baseplate and hinged disc shed weight and maximize board flex and feel. If you're looking for laid-back luxury with powerful performance, your Cadillac has arrived.



## SHIFTING SHAPES AND NEW STORIES

On the sales floor, retailers are touting boards with sophisticated shapes and simplified stories. "Board shaping continues to be an ongoing story and is something visual that consumers can actually relate to and understand," offers Ride US Sales and Marketing Manager Shawn Penrod. With blunt-nosed designs leading the way, many of these decks appropriate shapes from their old school ancestors. Nonetheless, the resulting boards are completely original. As Capita Product Development and US Marketing Manager Sean Tedore explains, "Standard nose and tail shapes have been replaced by models that have their own unique identity."

Although shapes are currently in the spotlight, they're not the only show in town. Manufacturers are continuing to refine camber profiles. This has led to a slight resurgence in cambered decks, as well as an increase in hybrid profiles that emphasize camber. Brands are also directing additional attention to the profiles of their cores, milling away material to refine a board's flex or shed weight from its tips and tails.

As boards continue to evolve, so do the conversations surrounding their sale. "There has been a craze for tech stories that has left retailers and consumers lost and confused," reveals Salomon National Sales Manager Mike Lawson. In their efforts to simplify things, brands are placing a greater emphasis on how the shape, symmetry, camber story, core profile, and composite layups of a board interact to influence its performance. As part of this evolution, retailers are de-emphasizing camber profiles in favor of promoting boards on the basis of their intended use.



## 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.

## THE SPLIT AND THE FIT

With above-average temperatures last winter, outerwear was often inessential. As Darkside Buyer and Stowe Store Manager Michael Toohey states, "It's difficult to sell a customer on new outerwear while it's consistently 60 degrees on the hill in January." Despite a surplus of apparel on the sales floor, brands are ready to roll out new collections.

At first glance, many of these collections seem to find their inspiration in the precious gems, the thrift stores of logging towns, and outlets that specialize in antiquated sporting goods. Yet these collections are much more complex than the disparate sources that inform them. "Mainstream fashion trends, colors, fabrications, and garment detailing are filtering through to sportswear and snowboarding outerwear faster and faster each season," explains Anakie Founder Erin Height.

Next year's collections reflect "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," explains Bonfire Design Director Kate Darnall. For this wild style, brands are tapping into rich, saturated colors, color blocking, and simple prints. For pieces with a more subdued style, brands are finding inspiration in lumberjacks, vintage outdoor equipment, and classic workwear. Many of these garments blend textured fabrics with waterproof treatments.

Whether wild or mild, next year's outerwear touts refined fits. Although many brands are expanding their offerings to include a range of cuts, most of their garments emphasize relaxed, slim fits. "In general, the 2014 collection is longer, leaner, and

cleaner," according to Burton Chief Creative Officer Greg Dacyshyn. This emphasis is yielding longer jackets that provide additional protection from the elements and pants that maximize mobility despite their slim fit. The increasing interest in fit is especially evident in women's outerwear. According to The North Face Product Director for Action Sports Jasmin Ghaffarian, "Women's fit is one of the most important trends to be looked at." This is leading to signature cuts that rely on ergonomically shaped features like darted knees, curved hems, and contoured, adjustable waistbands.

The fit—as well as the technical features—for many outerwear collections are informed by the backcountry. "Fits are more relaxed with a focus on articulation and movement when riding or bootpacking," explains Patagonia Business Unit Director Tyler LaMotte. To better equip riders for life outside the access gates, brands are tapping into fabrics that stretch and offer enhanced breathability.

Brands are also turning to the streets for inspiration, designing apparel that handles shred and après sessions equally well. The resulting garments blend traditional streetwear—like flannels, hoodies, and lightweight jackets—with technical fabrics and waterproof treatments. "Dual purpose pieces are taking over the sales floor," offers Volcom North American Sales Director Brad Alband. Despite their street aesthetic, these garments can accompany riders anywhere.



### 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.

## 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.



## THE ROAD AHEAD

Although next year's products are ready to make their debut, they will have to compete against plenty of closeouts. This surplus of product has caused brands and retailers to wonder if history is doomed to repeat itself. "Didn't we learn anything from three years ago?" Salty Peaks Owner Dennis Nazari asks. Increasingly, he has seen brands lose their appeal through "bad distribution choices and the commoditization of those brands." He explains that because of this, "core specialty shops are gravitating to smaller, independent brands to fill in open-to-buy."

As some brands stumble to define their distri-

bution network, however, others are working to tighten it. Never Summer, for example, has currently capped the amount of online dealers with which it works. Snow Sales Manager Mike Gagliardi states, retailers "should expect protection when they back your brand with orders that are commensurate with their sphere of influence, and they rightfully expect you to become a backer of the shop—not a competitor."

Many brands are also citing a desire to grow pre-existing accounts rather than open new doors. To do this, they are working to offer retailers better terms, tighter lines, increased customer engagement, and limited production. "The number-one thing we do to help our retailers is keep our production limited," Venture Co-Founder Lisa Branner offers. "This sense of scarcity allows our dealers to maintain price integrity throughout the season."

Despite uncertain times, brands and retailers are optimistic. Nonetheless, they stand to benefit from the advice of Dinosaurs Will Die Co-Founder Sean Genovese: "Don't bite off more than you can chew unless you have an in with Mother Nature," he offers. "And in that case, sell, sell, sell."