Lead The Pack….

Technology and The Transformation of the Future Fitness Experience

March, 2010

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Fitness Market Segment Manager
Intel Embedded & Communications Group

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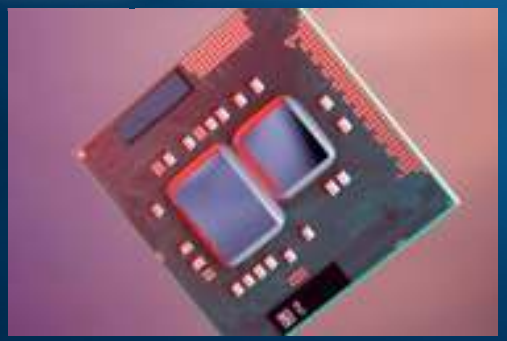
Agenda

- Introduction to Intel and the Embedded Group
- The Impact of the Embedded Internet
- Netpulse – Technology and Entertainment
- Athletes' Performance – Technology and Training
- Adidas – Technology and Devices
- Wrap Up/Q & A time

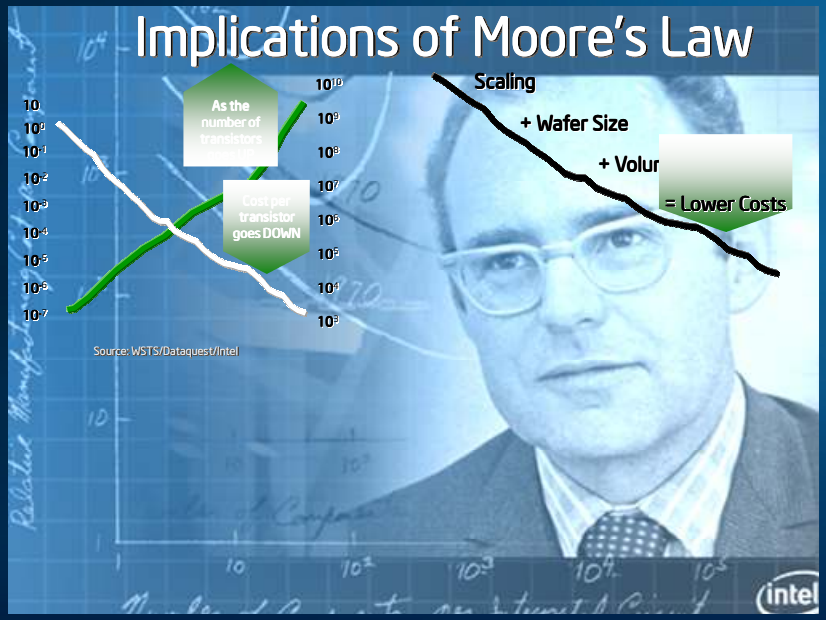
Who Are We?

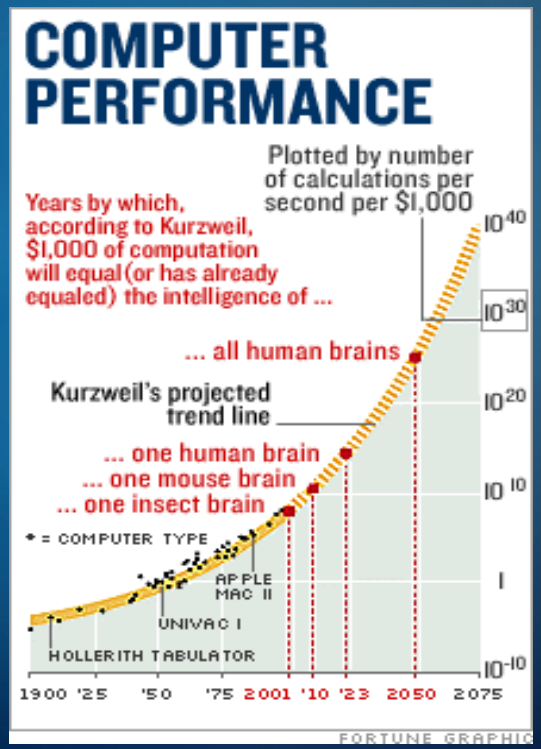
- Intel is the world's largest semiconductor company
- We build the "brains" of >80% of the world's computers
- The Embedded and Communications Group (ECG) focuses on "embedded" applications



Why is Intel Here?

- A Key Inflection Point is Here for the Fitness Industry
- Technology and the Internet Will Play a Bigger Role
- The Internet Runs Best on Intel® Architecture (IA)
- New Opportunities and Experiences Will Present Themselves
- Moore's Law is alive and well





www.intel.com/embedded

The Embedded Internet

BY 2015

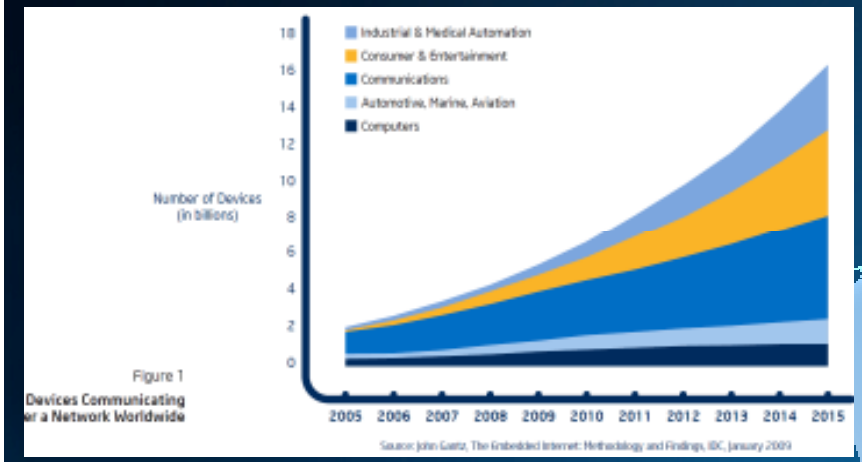


Figure 1

Devices Communicating er a Network Worldwide

Source: John Gantz, The Embedded Internet: Methodology and Findings, IDC, January 2009

15B Devices

Invisible

Ubiquitous

Many

Researchers

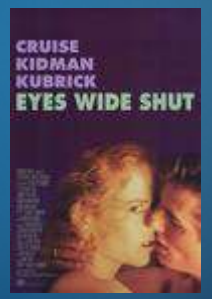
Mainframes | Servers, PC's | Cell Phones | Embedded

Internet – 7 X 24, Every Modality of Life

www.intel.com/embedded

Who Can Imagine the Future?

- What Was the Hot Thing on March 11, 2000? *
  - Top TV Network and Show – *ABC "Who Wants to Be a Millionaire?"*
  - Zero downloads on iTunes*
  - Encyclopedias primarily sold in hardback and CD versions
  - "Eyes Wide Shut" top VHS rental for that week *



- Let's Imagine 2015 Together…

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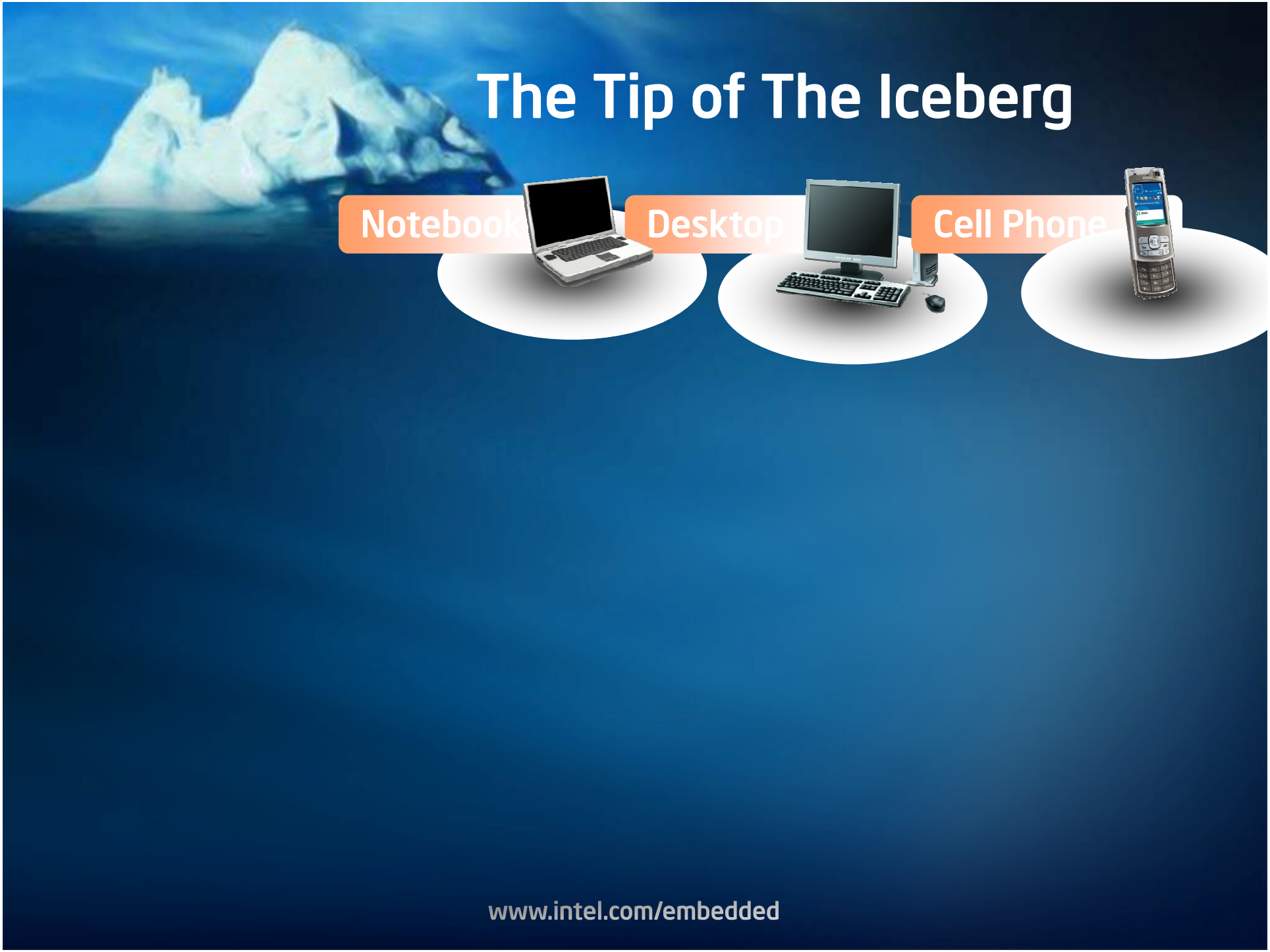
Imagine Video

The Tip of The Iceberg



The Tip of The Iceberg

Notebook

Desktop

Cell Phone

THE EMBEDDED INTERNET

NEXT WAVE OF CONNECTED DEVICES

Wireless Infrastructure

Enterprise Storage

Routers

Point of Sale

In-Vehicle Infotainment

IP Phones

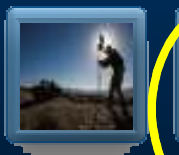
IP Cameras

Power Lines

Security

VoIP

IPTV/IMS


Military/Aero

Digital Sign

Home Auto

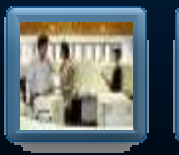
Portable Medical

Home Storage

Gaming

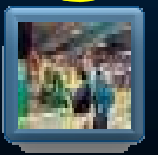
Medical

Industrial PC


Printers

Transport

Robotics


Factory Automation

Sensors

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The Tip of The Iceberg

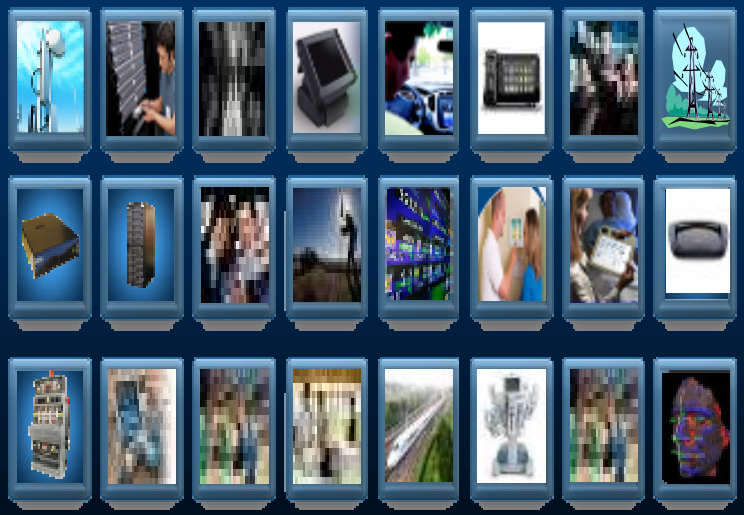
Notebook

Desktop

Cell Phone

THE EMBEDDED INTERNET

NEXT WAVE OF CONNECTED DEVICES



IP-based

Dedicated Function

User Interface

Connected

Security-enabled

Multi-OS Environment

Intelligent

Energy Efficient

Remote Management

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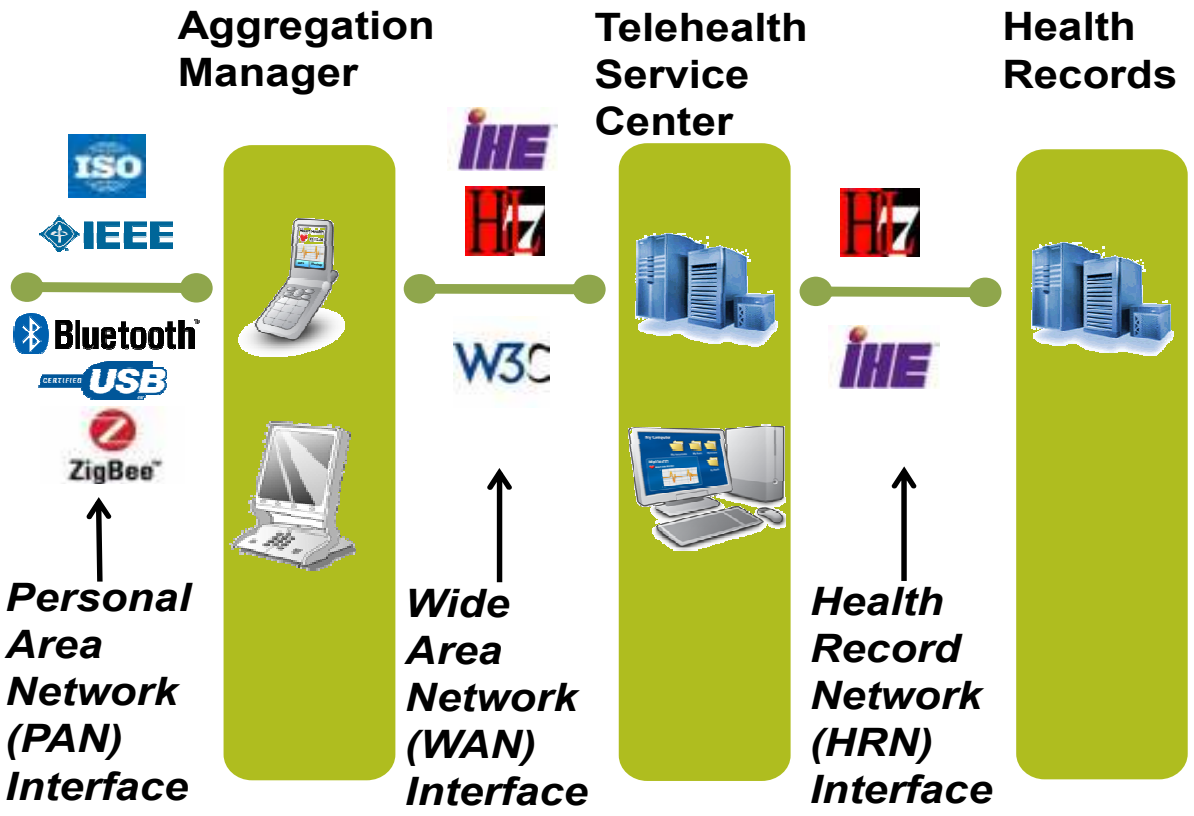
Standards are Important for Growth and Scale

Continua HEALTH ALLIANCE

End-End Ecosystem Standards

Personal Device

- Thermometer
- Pulse Oximeter
- Pulse / Blood Pressure
- Weight Scale
- Glucose Meter
- Cardio / Strength
- Independent Living Activity
- *Peak Flow*
- Medication Adherence
- *Physical Activity*
- *Electrocardiogram*
- *Insulin Pump*



Success Stories From Industry Leaders…

- Bryan Arp; CEO, Netpulse
- Mark Verstegen; Founder/President, Athletes' Performance
- Simon Drabble; Director, adidas Interactive

YouTube
EXTRA! EXTRA!
ESPN
CBS
msnbc
MTV
Netpulse
Personal Entertainment System
START
abc
Revision3
CNN
twitter
facebook
iPhone
FOX NEWS
NBC
ROOFTOP COMEDY

About Netpulse

Lead Investors

Investors from New York, SF and LA provide access to financial, expertise and partner resources

Draper Fisher Jurvetson

DJF Network has over $6 Billon under management and over 600 investments on four continents.

JAVELIN VENTURE PARTNERS

Lead by the founder of Keyhole (Google Earth). Javelin provides outstanding connections to the Silicon Valley's top companies and technology

PARKVIEW

Parkview's Technology Fund is comprised of investors from New York's entertainment, media and financial sectors

Leading Technology

intel

Executive and Board Leadership

Tom Proulx (founder of Intuit), Mark Mastrov (founder of 24 Hour Fitness) and other leaders in the field of fitness, entertainment and media provide Netpulse leadership. The board and executive team also brings experience from companies such as Google, NBC, American Express and Opera Software

Video

Netpulse Online Media Statistics

Facebook

400 Million Active Users Worldwide

50% Log into their account every day

Twitter

75 Million User Accounts

5 Million new accounts created monthly

Online Video

178 Million people viewed an online video in Jan.

187 Videos is the average number of views per person

33 Billion Videos Watched in January

Evolution of Media

Internet is no longer destination driven but service driven

Media has been unlocked from TV and is now portable

On-demand, personalization and interactivity is the new expectation

Netpulse

The Challenge

If we want consumers to use our clubs and products every day….

We need to be a part of their everyday life

Media Consumption

All day access to media and data in everyday life has become the norm, except…

AVERAGE CLUB MEMBER SPENDS

- 20-30 per workout on CV
- 3+ hours per month on CV
- Actively looking to consume media

Netpulse

Technology = Connection

Technology for purpose, not for the sake of technology, but as an ecosystem *platform* to enable:

connection

engagement

removal of barriers

Ecosystem: EXERCISERS

- **Personalized Experience unique to them (bubble)**
- **Access to the media they desire**
- **Seamless exercise tracking**
- **Social Media connections**

Ecosystem: MANUFACTURERS

- **Products that exercisers love**
- **Access to the equipment to provide service proactive**
- **Usage reporting**
- **Ability to upgrade with new programs and services**

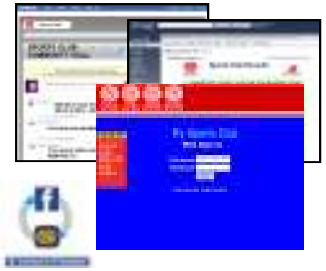
Ecosystem: HEALTH CLUBS

- **Provide members a personalized experience that fits their lifestyle**
- **Connect: increase your member touches**
- **Access to usage data to identify trends**
- **Incentive behavior**
- **Universal platform**

Your Club as the Center of your members Healthy Life

In the Gym

- *Entertainment*
- *Automated Tracking*
- *Integration with CRM*
- *One-on-One Communications*
- *Rewards/Incentives*



Online

- *Exerciser Website*
  - *Exercise tracking*
  - *Social groups*
  - *Rewards account*
  - *Communication with employees*
- *Email Rewards/Statements*
- *Social Network Integration*

Outside the Gym

- *Activity tracking*
- *Entertainment Preference*
- *iPhone / Mobile Application*
- *Monitoring device integration (Polar,etc)*

Corporate/Healthcare

- *Data sharing*
  - *Healthcare providers*
  - *Insurance providers*
- *Usage/performance incentives*
- *Corporate challenges/events*

powered by Netpulse

Executing the Vision Today

Town Sports International

NYSC new york sports clubs
BSC boston sports clubs
WSC washington sports clubs
PSC philadelphia sports clubs

Netpulse exclusive entertainment and services provider

Netpulse

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www.netpulse.com

follow us on twitter

Find us on Facebook

Technology & Training

Driving Personalized and Intelligent Programming

Athletes PERFORMANCE

CORE PERFORMANCE

Mark Verstegen
Founder/Chairman

Athletes' Performance

Trainers of the Top Champions in Sport

Heritage

Launched in 1999

Built as a refuge

For the Athletes – their name on door

Training top performers

World's leading Applied R&D Performance Labs

Facilities

National

Phoenix, Arizona

Los Angeles, California (Home Depot National Training Center)

Gulf Breeze, Florida (Andrews Institute)

Dallas, Texas

Athletes

World Class

Teams

Elite athletes

Leagues & Governing Bodies

Industry professionals

Achievements

NFL

9 1st RD NFL picks 2009
4 straight #1 overall picks

MLB

8 All-Stars 2009
World Series Champions

SOCCER

World Cup Champions

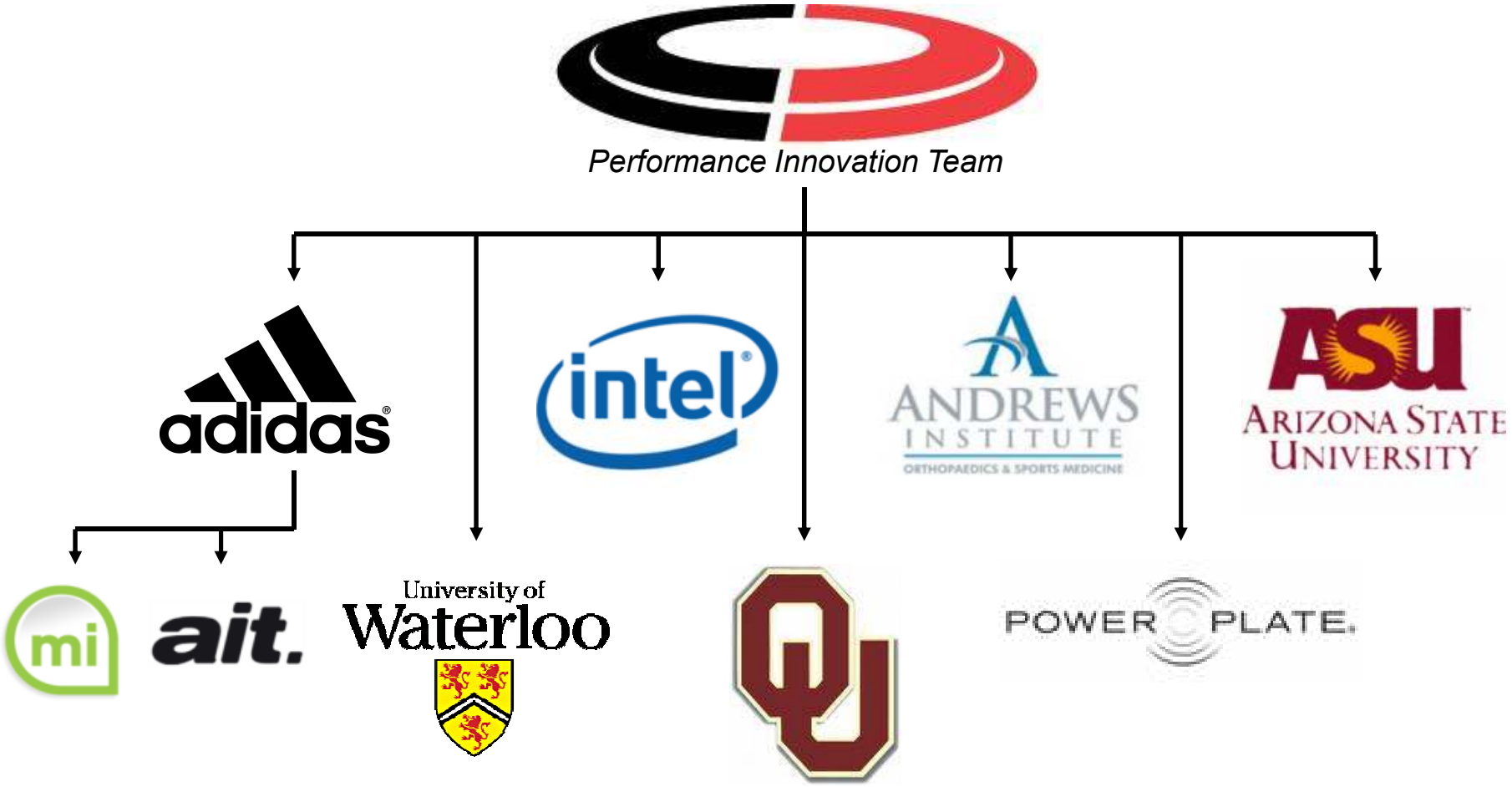
PGA / LPGA

Major Champions

Athletes' Performance Training Systems & Methodology

- Sustainable and systematic approach to program design
- Centers around foundational pillars:
  Mindset, Nutrition, Movement, Recovery
- Backed in Science
- Tried & Tested over 15 years with elite athletes (Athletes' Performance) and general population (Core Performance)
- Session layout comprised of comprehensive training components
  - Pillar Preparation
  - Movement Preparation
  - Plyometrics
  - Med Ball
  - Movement Skills
  - Strength
  - Energy System Development
  - Regeneration
  - Corrective
- Constantly evolving through research & innovation

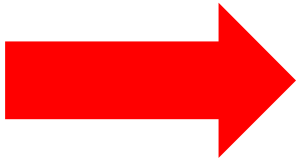
Methodology Evolution & Innovation



Our Mission…

Athletes PERFORMANCE

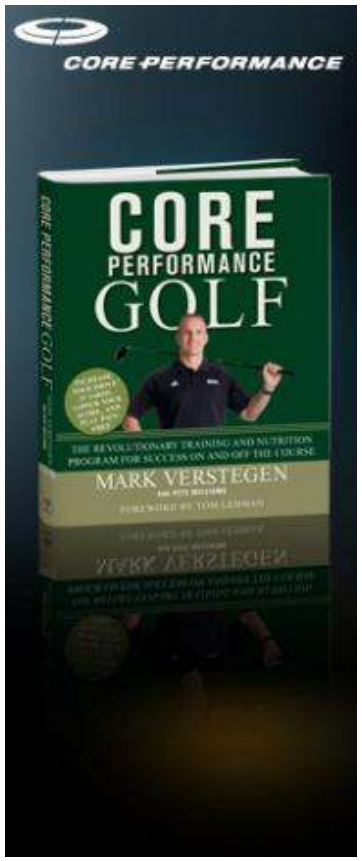
Provides the finest performance systems, specialists and facilities seamlessly integrated to efficiently and ethically enhance our athletes' performance.



CORE PERFORMANCE

Provides the finest performance systems, specialists and platforms seamlessly integrated to efficiently and ethically enhance our achievers' performance.

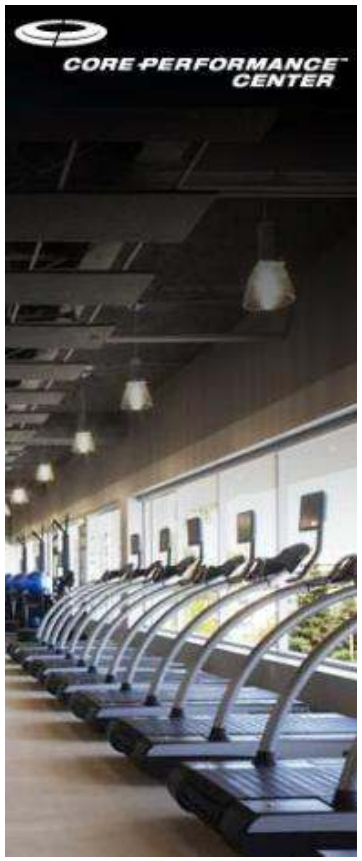
Core Performance Evolution



Books & DVDs

Digital Media

Evaluation Station



Core Performance Center

Corporate Wellness

Challenges in…

Health. Health Care. Health Clubs.

The more we know about an individual, the more personalized and intelligent their prescription can be, and the better we can help people achieve their goals.

Athletes' Performance Data Capture

Quantitative Data

- Movement Quality
  - Functional Movement Screen
  - Physical Therapy Assessment
  - Biomechanical Evaluation
  - Force Plate Data
- Cardiovascular Fitness
  - Sub-max VO_2 (iMett)
  - Equipment fitting
- Performance Testing
  - Keiser power testing
  - Vertical jump
  - Wingate
  - Linear/MD movement skills
- Mindset
  - Communication preference (DISC)
  - Cognitive assessments
  - Stage of readiness (MNMR)
- Nutrition
  - Daily food intake
  - Food sensitivities
  - Body composition

Alternate Data

- Injury history
- Medical history
- Current activity level
- Weekly training schedule
- Duration of Training
- Equipment availability
- Training Goals/Wants/Needs
- Sport & position demands
- Activity demands
- Performance deficits
- Training history
- Peaking / Downloading

Daily Considerations

- How are they feeling at the start of each session?
- Are they tired, soar, sick, injured?
- What if they skip a day of their training? Or add a day to their schedule?
- How have they been doing with their program? Do they need to be progressed or regressed?
- How have they reacted to the training stimulus? Has it been successful? (Heart Rate, Power Output, Training Density, Intensity/Volume, Movement Selection, Performance Improvements)
- What if they changed their goals?
- What if they want to train 2x's a day?
- What if they have other activities or competitions to balance between their training?
- How do I adjust their program after I have re-evaluated them?

How do we create programming from all of this data?

Program Generation

Athletes' Performance Team

- Global recruitment
- Highly educated & experienced
  - Degree programs
- Performance University
  - New hire education curriculum
  - Internal continuing education
- Full time staff
- Integrated support across the team
  - Nutrition
  - Physical Therapy
  - Performance Specialists
- Working under a consistent system of training & methodology
- ONE Team

Medical History

Training Experience

Performance Demands

Functional Movement Screen

Physical Therapy Assessment

Injury History

Performance Deficits

VO_2 Results

Tired

Training Schedule

Communication Preferences

Duration of Training

Cognitive Abilities

Equipment Availability

Unexpected Injury

Goals

Training Wants

Health Clubs
Personal Trainers
Members

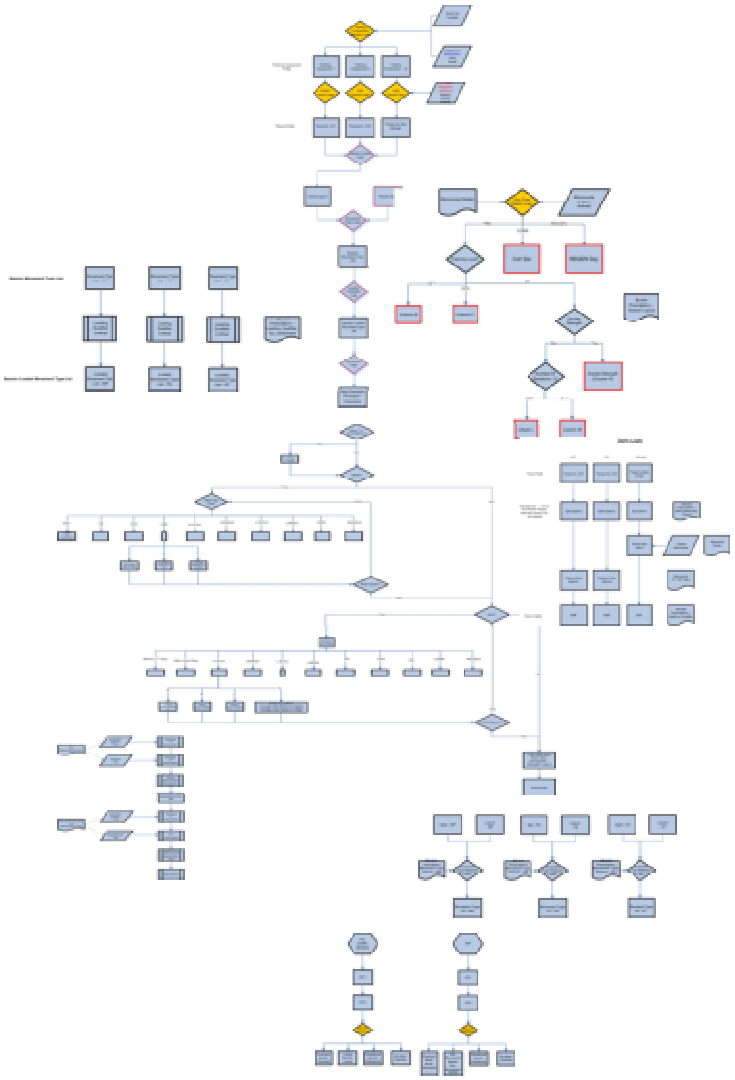
Sickness

Soreness

Q: How can we support health clubs, and personal trainers create and deliver world class, personalized, and intelligent programming to everyone?

Prescription Engine

- World's first intelligent and adaptive rules based system to deliver personalized and intelligent programming
- Created by the collective knowledge and experience of Athletes' Performance
- Over 25,000 rules and considerations
- Live tracking and logging – heart beat, wattage, intensity, volume, performance, pace, and health
- Real-time modification of training based off of all data collected (initial evaluation, on-going tracking)



Prescription Engine

Scalable.

- Able to upgrade intelligence and personalization immediately

Sustainable.

- Complex tasks such as tracking, program design, last minute schedule changes, injuries – all are taken into consideration and dealt with instantly and effortlessly.

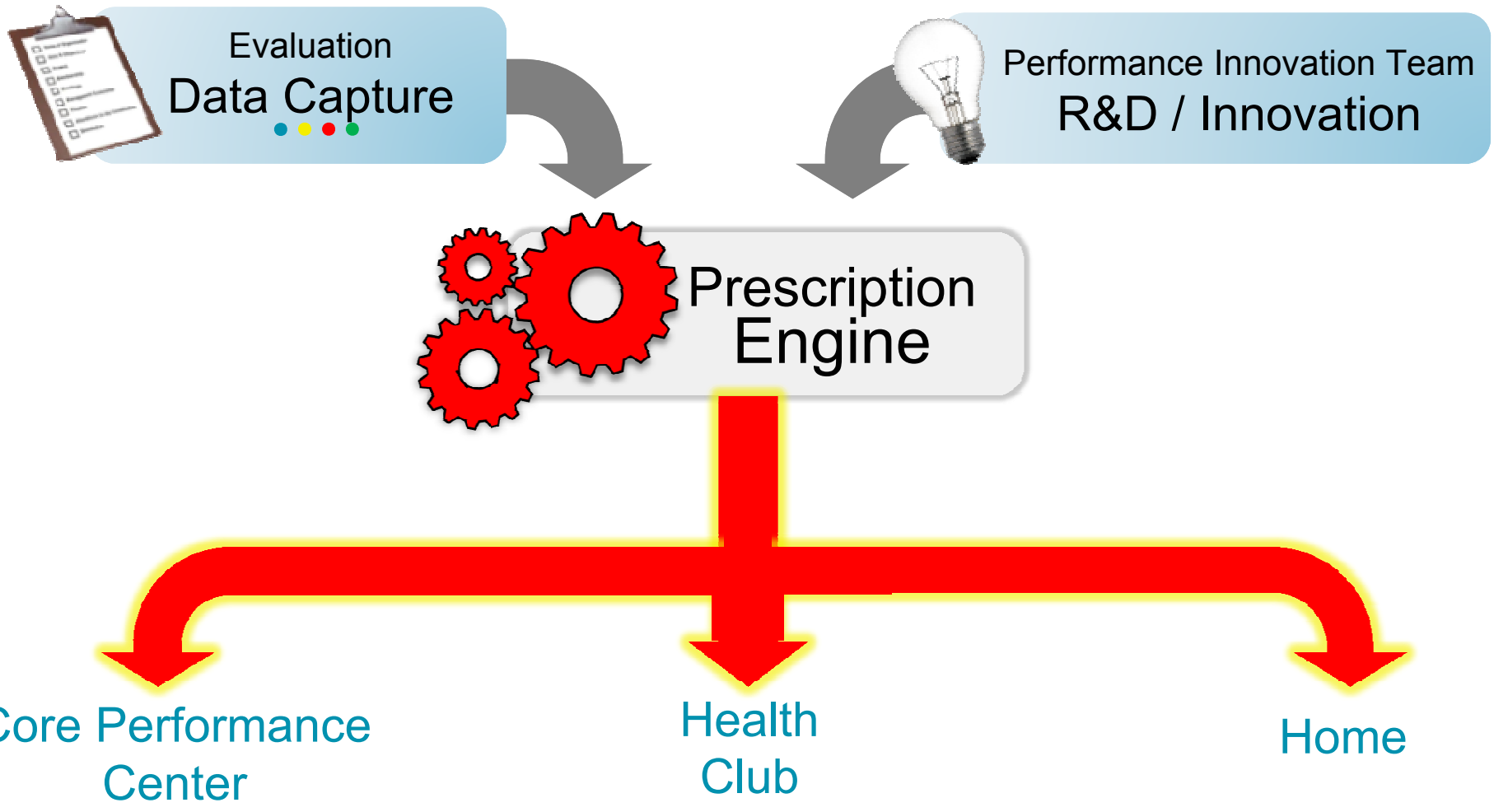
Supportive.

- Not a replacement, a highly educated & experienced assistant coach.
- Helping good coaches become GREAT coaches

Evolving.

- The Prescription Engine is a constant evolution as Athletes' Performance continues to research and learn

The Prescription Engine



Core Performance Center

- **World Class**
  Facility, Equipment, Technology & Support
- **Intelligence**
  Personalized programming dynamically created, monitored and modified
- **Specialists**
  Trainers, Nutritionists and Physical Therapists
- **Data capture**
  Evaluations, on-going tracking & monitoring
- **Seamless Integration**
  Mindset, Nutrition, Movement, and Recovery

Core Performance Center

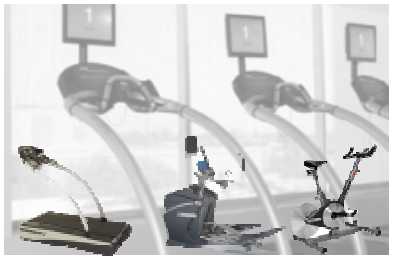
Proprietary Systems & Equipment

CPro - Patented CPro network custom made equipment that supports the software, self adjusts and self loads resistance

CPesd - Custom Cardio Equipment that supports the software and self adjusts to deliver personalized programming every session

Program Delivery - interface with videos, coaching tips, real-time feedback, automated equipment setup, and tracking of every rep

Coach Support - Every session is coached by our leading performance specialists who focus on correcting movement patterns and encouragement/motivation



Core Performance Center

Powerful Stats - 2009

- 89% repeat renewal rate (97% excluding those who moved out of state)
- 10% attrition rate (industry norm ~50%)
- 38% of current members joined as a referral from a member (industry norm ~20%)
- 32% of members train in our facility on a daily basis (industry norm: ~17%)

Core Performance

Health Club Integration

Supporting…

Health Clubs.

Personal Trainers.

Members.

Attain. Enable. Retain.

Health Club Integration

CPCenter

- **Compliments** existing services & training
- **Supports** health club, trainer, & members
- **Evaluation Stations**
  Assessment / Data capture hub to drive programming
- **Education**
  to empower & motivate
- **World Class**
  Premium service

Health Club Integration

CPCompatible Area

KEISER

For The Long Run
WOODWAY

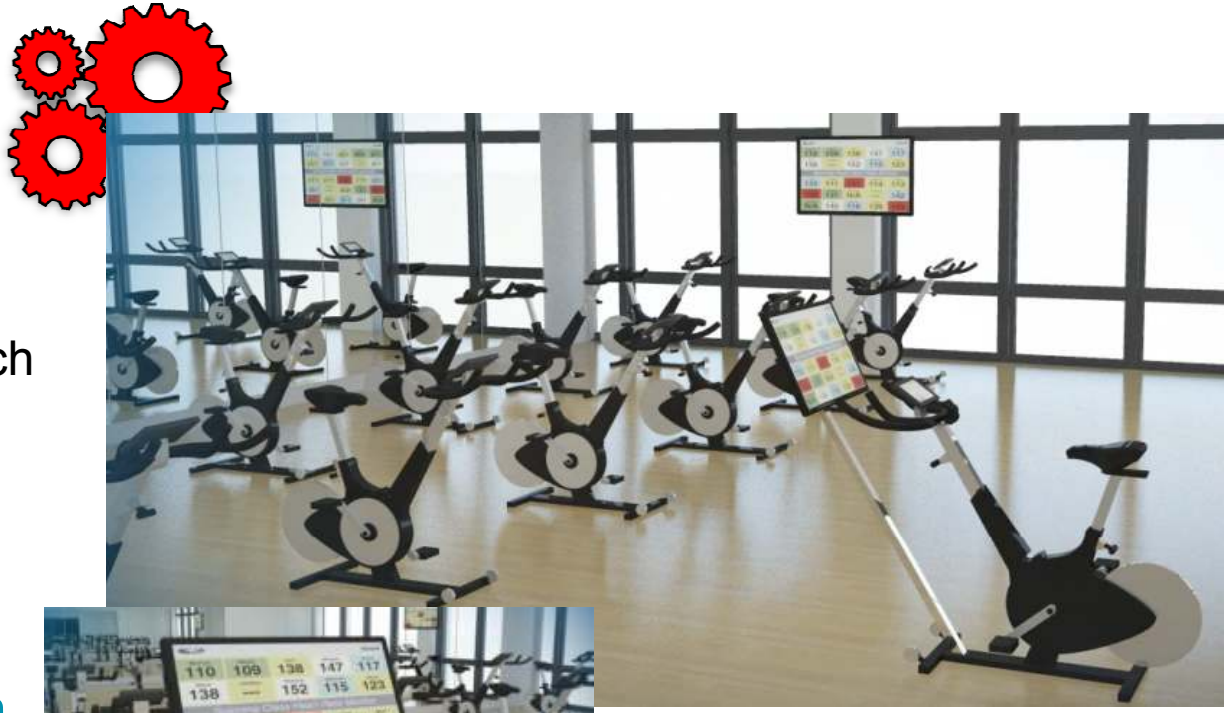
POWER PLATE

PowerBlock
World's Best Dumbbell
Since 1993

Health Club Integration

CPClasses

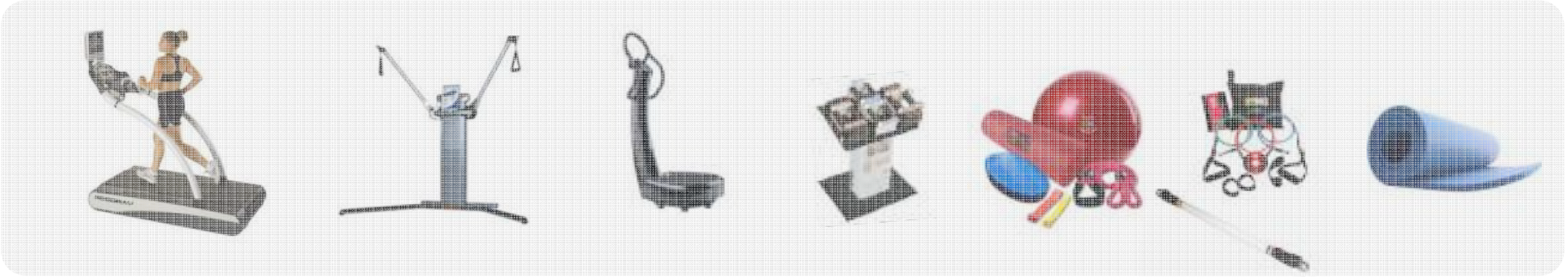
- **Personalized**
  group class experience
- **Support**
  frees up instructor to coach each member
- **Data capture**
  on-going tracking & monitoring
- **Seamless Integration**
  Considers other training they are doing from group to personal training



Prescription Intelligence

CPCorner & On the Road

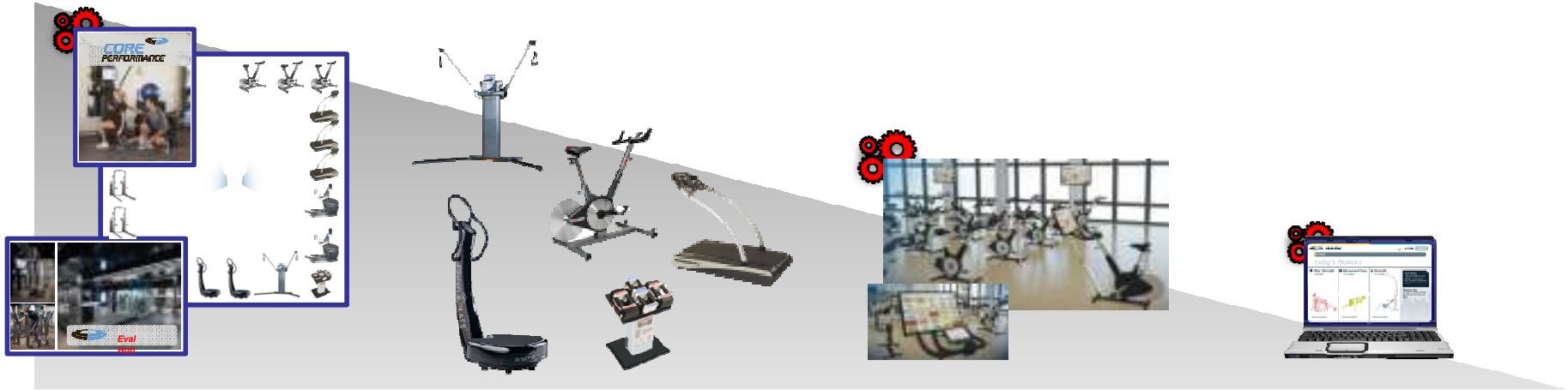
- Supports the member outside of the club between visits seamlessly
- Equipment availability ranges from none to full equipment



Full Equipment ⟵ ⟶ *Little Equipment*

Health Club Integration

CPContinuum



CPCenter CPCompatible CPClasses CPCorner

Educational Support → CPUniversity

Intelligent.
Personalized.
Simple Solutions.
Results.

Attain. Enable. Retain.

adidas®

mi

Contact for more information.

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MVerstegen@AthletesPerformance.com

www.AthletesPerformance.com

www.CorePerformance.com

www.CorePerformanceCenter.com

Sports and Fitness Devices:

Simplifying the Product Proposition

Simon Drabble, adidas

Why miCoach?

micoach adidas

Everyone wants to look and feel better. Many of us just don't know where to start. Knowledge is the barrier to success.

THIS IS WHY WE MAKE MiCOACH.

Keep it Personal

micoach adidas

- Everyone's "Better" is different
- We all start from a different point
- We all develop at different speeds
- We all have different exercise preferences

Simplify the Science of Training

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- Devices need to simplify the science of training and work seeamlessly
- Heart rate is:
  - An accurate measure of exersion
  - A method that can be simplified for the users benefit

Simplify the Science of Training

micoach adidas

Simplify the Science of Training

micoach adidas

Interactive Training Platform

micoach adidas

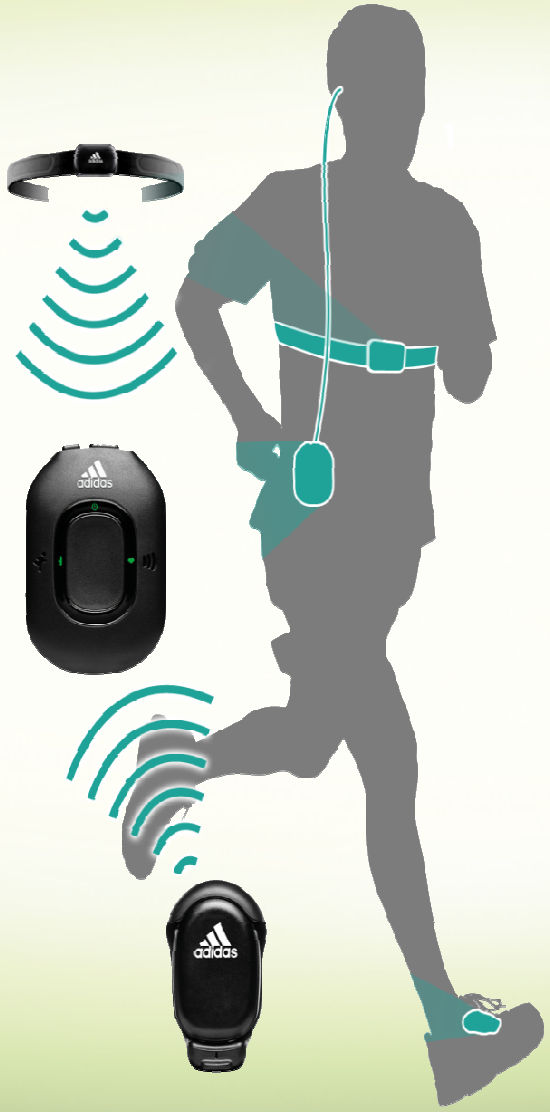
Enhance the Experience

micoach adidas

PACER

Real-Time Audio Coaching

Your **miCoach Pacer** listens to your body by communicating wirelessly with your HRM and Stride Sensor to record your workout stats. During each workout you will hear real-time audible coaching along with elapsed time, calories, heart rate, distance, pace, and stride rate. Afterwards, the stats from your miCoach Pacer are synchronized with your profile on adidas.com/micoach.



Enhance the Experience

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ZONE

Apparel integration

- **Sensing technology moves to integrated apparel solutions**

Bringing miCoach to Life

micoach adidas

- How do we bring simple heart-based coaching to our consumers?

- Integrate into the daily training routines of our consumers
  - Works with every MP3 player in the world
  - Suitable for individual needs
    - coach or record
    - audio or visual feedback

Technology Working Harder in Fitness Centers

micoach adidas

Digital platforms

Exercise Equipment

Devices

Smart Apparel

Success Benefits All

- Allowing people to maintain their workout habits, but make them more efficient
- It is Personal, simple and effective training
- Using technology to bring down barriers

The Digital Health Club Vision

Member Management Kiosks

Group Exercise

Video walls

Sensors (participant & instructor)

Digital Signage

Evaluation / Digital Coaching / Electronic Training

Readiness / progress evaluation on multiple vectors

Low cost motion capture

Wearable computing

Networked, Tech-Enabled Strength Equipment

Personalized, rules-based programs; monitoring & feedback and online reporting

Automated equipment adjustments

Movement Evaluation / Correction

Networked Cardio w/ Integrated Entertainment

Entertainment: On-demand content, HDTV, iPod /Fitness device docking, virtual courses, competition, gaming

Personalized program(s); monitoring, feedback, social networking, online reporting

Remote management capabilities; wireless connectivity

Kiosk

Digital Fitness Center of the Future Video

How Can Embedded Intel® Architecture Help You?

- For the Club and Home Environments
  ...Provides more interactive personal experiences
- Equipment Manufacturers and Integrators
  ....Provides opportunity to streamline processes
- Distribution Channel
  ...Provides greater efficiency
- Club Owner
  ...Provides opportunity for increased effectiveness
- Corporate Wellness
  ...Provides positive ROI to the corporation

Summary and Call to Action

Key Inflection Point for Fitness Industry

Technology and the Embedded Internet Will Be a Big Deal

The Internet Runs Best on Intel® Architecture

Lead the Pack!
Embrace Innovation and Invest!!

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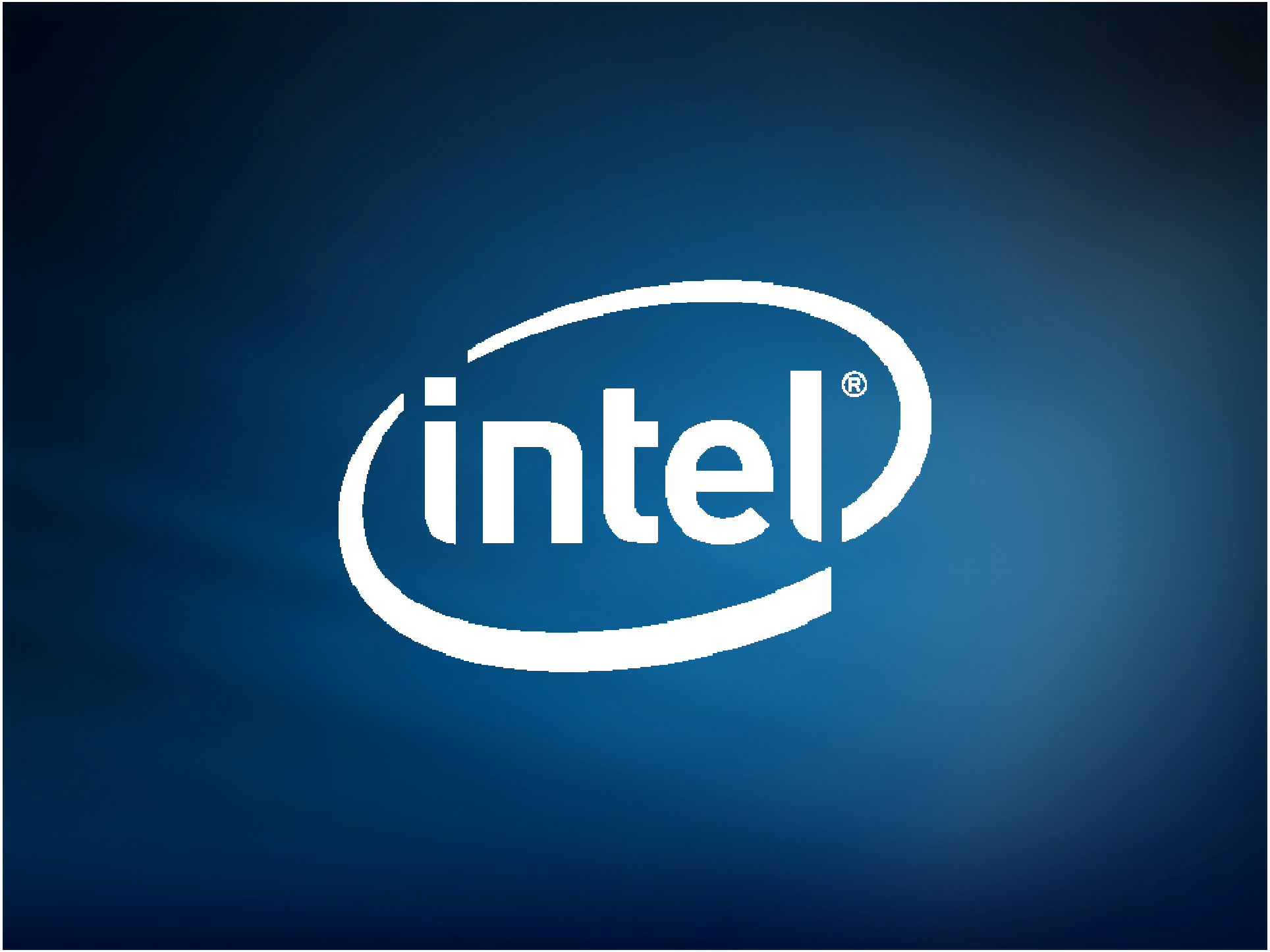
Q&A

- Questions?

Robert Noyce, Intel Co-Founder
"Don't Be Encumbered by History, Go Off And Do Something Wonderful!"


intel

Backup

Why Intel Is the Right Choice

- Economies of scale
  - ECG can leverage R&D, CAPEX, and run rate volumes of Intel corporate
  - Broad ECG customer base/segment focus allows us to better handle market fluctuations
- Strong worldwide presence serving the needs of global customers
- Intel controls it's own destiny from an IP and process technology perspective
- Intel has a proven, 30 year+ track record in embedded market segments
- ECG provides at a minimum 7-year long-life support for its products
- Scalable performance and broad acceptance of Intel® architecture (the overall strength of the Intel architecture pedigree)
  - Large pool of software developers familiar with Intel architecture
  - Broad range of applications, tool chains, OS's, stacks, middleware, etc.
- Robust ecosystem/wide range of software applications/OS's with Intel architecture