Part I: A wee bit of background
Who exactly am I?

By Day:
• Architect designing enterprise network and datacenter infrastructure for some of the world's largest organizations based out of Paris, France – travel extensively

By Nights and Weekend:
• Competitive triathlete: Proficient runner, functional cyclist and flailing swimmer (I love all flotation devices)
• Completed a few Ironman’s, a few marathons, and a huge pile of far less painful races
• Love to travel and tinker with gadgets (though my wife would say I just like stockpiling them)
• Eat lots of cupcakes (Official Tester in Residence at Bertie’s CupCakery)
• Started just over 7 years ago in September 2007
• Best known for ‘In Depth Reviews’ of Sports Technology products
• Reviews are the primary initial driver of traffic to site
• Over 2.8 Million page views/month, 1.2 Million+ uniques/month
• Tens of thousands of daily RSS subscribers including editors for most major sport magazines and gadget sites
• 23K+ Twitter followers, 33K+ Facebook Fans
• Consistent growth month over month
• Revenue based primarily on affiliate links
• No advertising from product segment I review
Readership Geographies

US/Canada: 45%
Europe: 40%
Remainder: Everywhere
Who is the reader?

- From people who don’t know what a HR strap is to those with PhD’s on heart rate technology, aerodynamics engineers, etc...
- Readers are across wide range of levels from Olympic Gold Medalists to those trying to lose 300+ pounds
- Followed by most financial analysts/investment companies watching the sector
- Mainstream media publications – Washington Post, The Guardian, etc...
- Technology media publications – Engadget, Gizmodo, TechCrunch, etc...
- Television stations – FOX News, etc...
- Sports media publications – Every editor of major pubs
- And finally....you. The companies I review and talk about.
Part II: 2014: The Connected Watch
In the beginning...

- There were:
  - Fitness watches
  - Regular cheap watches
  - Fancy high-end watches
- But many fitness watches still used as regular watches
- Middle of last decade: Addition of GPS started to carve out new category, different sized/purpose units
- You then had a desktop application that uploaded data
- And last 24 months added phone/WiFi connectivity
The 1st generation of smart watches

- Smart watches aren’t actually new either, first connected option around 2000, by IBM (with Linux)
- Then mostly silence, every 3-4 years something showed up
- Around 2012ish, new resurgence, driven by Kickstarter and projects like Pebble & Metawatch
- But still highly geek-focused, not yet sport/mass-adoption focused
- Were/are slow, have poor battery, poor displays, not durable
- Android Wear starts to potentially create standardization
List of “Smart Watches” per Wikipedia

<table>
<thead>
<tr>
<th>Brand</th>
<th>Model Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sony SmartWatch</td>
<td>HOT WatchWearing</td>
</tr>
<tr>
<td>SmartWatch 2</td>
<td>Kreyos Meteor</td>
</tr>
<tr>
<td>Samsung Gear Live</td>
<td>GEAK Watch</td>
</tr>
<tr>
<td>Pebble Watch</td>
<td>i'm Watch</td>
</tr>
<tr>
<td>Samsung Gear 2, Gear Neo, and</td>
<td>Digital WEDA (Slap Band)</td>
</tr>
<tr>
<td>Gear Fit</td>
<td></td>
</tr>
<tr>
<td>Samsung Gear S</td>
<td>Omate TrueSmart</td>
</tr>
<tr>
<td>Samsung Galaxy Gear</td>
<td>Z1 Android Watch-Phone</td>
</tr>
<tr>
<td>Garmin Forerunner</td>
<td>Fashion S9110</td>
</tr>
<tr>
<td>NikeFuel</td>
<td>LG GD910 (limited edition)</td>
</tr>
<tr>
<td>WIMM One</td>
<td>Hyundai MB 910</td>
</tr>
<tr>
<td>Motorola Motoactv</td>
<td>ANDROID SmartWatch</td>
</tr>
<tr>
<td>Motorola Moto 360</td>
<td>LG G Watch</td>
</tr>
<tr>
<td>MetaWatch Strata</td>
<td>Qualcomm Toq</td>
</tr>
<tr>
<td>Timex Datalink</td>
<td>Seiko Ruputer</td>
</tr>
</tbody>
</table>
Fitness folks start doing smart watches

- First true fitness focused smart watch was the Motorola Motoactv
- Then we started seeing Garmin get involved (i.e. Fenix lineup)
- Now Suunto, Timex, Soleus and others
- These watches though were more about notifications than about app development like Pebble
- They could effectively do what most 1st gen smart watches could do...but better.
And then there was a fruit company

- The Apple Watch: Most feared yet least understood watch out there
- What we know: What it looks like, the screen, app platform, base price point, requires Apple device
- What we don’t know: Waterproofing, battery life, full price points, connectivity requirements, exact release date, how much access apps have to hardware
- You might be in a better position than you think
More than a watch, it’s a platform

- Why Apple is different - it’s actually two platforms:
  - Apps on the watch device
  - Health Kit as a health/fitness platform
- By doing so they complete the ecosystem (and has ‘Just Works’ factor)
- Whether or not health/fitness apps will see it as a threat remains to be seen
- Companies will have to compete on: Hardware / Price / Platforms
Everyone wants a platform

- Every health/fitness app wants to be that repository
- A massive mess of companies with API’s
- Slightly different goals, odd alignment for consumers
Platforms don’t equal standardization

- “A product/system is a standard when it has 80% of the market” - Richard McAinsh (Verve/Infocrank)
- What is a platform anyway?
- Rather, platforms just act as landing pads for data, user connectivity and social interaction
- Each company now has to normalize data
- There is no data standard for steps, distance, calories or sleep
Standardization: The Just Works Factor

- This is actually why consumers buy most of your products – it works with other things they’re using:
  - Bluetooth Headset, Music
  - The USB plug
  - A SD or CF card for a camera
- Differences in quality, yes, but core interoperability, no
- Making examples: No pain, no gain.
Standardization

- Two core areas of focus for this crowd:
  - File Format Standards
  - Connectivity Standards (using standard profiles correctly)
- Rule #1: I don’t care about your excuses*
- Rule #2: Consumers don’t care about your excuses
- Rule #3: Refer to Rules #1 & #2
- *Your excuses will cost you business
# Suunto Ambit3 Bluetooth Smart Compatibility

<table>
<thead>
<tr>
<th>Sensor Name</th>
<th>Sensor Type</th>
<th>Compatible?</th>
<th>Ambit3-specific Compatibility Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>4iiii Viiliiva</td>
<td>Heart Rate only</td>
<td>No</td>
<td>Pairs, but can't find upon activity start</td>
</tr>
<tr>
<td>4iiii Viiliiva</td>
<td>Heart Rate + Running Footpod</td>
<td>No</td>
<td>Pairs, but can't find upon activity start</td>
</tr>
<tr>
<td>4iiii Viiliiva</td>
<td>Heart Rate + Power Meter</td>
<td>No</td>
<td>Pairs, but can't find upon activity start</td>
</tr>
<tr>
<td>4iiii Viiliiva</td>
<td>Heart Rate + Speed/Cadence Sensor</td>
<td>Partial</td>
<td>Displays cadence/speed, but not HR</td>
</tr>
<tr>
<td>Adidas Bluetooth Smart Stride Sensor</td>
<td>Running Footpod</td>
<td>Yes</td>
<td>All good!</td>
</tr>
<tr>
<td>Kinetic Inride</td>
<td>Cycling Power Meter/Trainer</td>
<td>Partial</td>
<td>Power displays, no speed/cadence</td>
</tr>
<tr>
<td>Mio Link</td>
<td>Optical HR wrist sensor</td>
<td>Yes</td>
<td>All good!</td>
</tr>
<tr>
<td>Polar H7</td>
<td>Heart Rate</td>
<td>Yes</td>
<td>All good!</td>
</tr>
<tr>
<td>Pyle Sports Footpod</td>
<td>Running Footpod</td>
<td>No</td>
<td>Pairs, but can't find upon activity start</td>
</tr>
<tr>
<td>PowerTap BLE Cap</td>
<td>Cycling Power Meter</td>
<td>Yes</td>
<td>All good!</td>
</tr>
<tr>
<td>PowerTap BLE Speed/Cadence Sensor</td>
<td>Speed/Cadence combo sensor</td>
<td>Yes</td>
<td>All good!</td>
</tr>
<tr>
<td>Scosche Rhythm+</td>
<td>Optical HR armband sensor</td>
<td>Partial</td>
<td>Depends on firmware version</td>
</tr>
<tr>
<td>Stages Power</td>
<td>Cycling Power Meter</td>
<td>Partial</td>
<td>Base functionality works</td>
</tr>
<tr>
<td>Wahoo RPM (V1/V2)</td>
<td>Cadence Sensor</td>
<td>Partial</td>
<td>Cadence yes, but overrides GPS speed with 0-value</td>
</tr>
<tr>
<td>Wahoo Blue SC (v1)</td>
<td>Speed/Cadence combo sensor</td>
<td>Yes</td>
<td>All good!</td>
</tr>
<tr>
<td>Wahoo Blue HR</td>
<td>Heart Rate</td>
<td>No</td>
<td>Pairs, but can't find upon activity start</td>
</tr>
<tr>
<td>Wahoo TICKR</td>
<td>Heart Rate</td>
<td>Partial</td>
<td>Pairs, but finicky on finding sensor during activity</td>
</tr>
<tr>
<td>Wahoo TICKR RUN</td>
<td>Heart Rate, Running Cadence</td>
<td>Partial</td>
<td>Pairs, but finicky on finding sensor during activity</td>
</tr>
<tr>
<td>Wahoo TICKR X</td>
<td>Heart Rate, Running Cadence</td>
<td>Partial</td>
<td>Pairs, but finicky on finding sensor during activity</td>
</tr>
</tbody>
</table>
The door swings both ways: ANT+

- Adoption/Creation of profiles is simply taking too long
- Trainer Profile: Years in the making, no tangible adoption
- Power Meter High Speed Data: Going to BLE islands instead – Stages (or private ANT – Pioneer)
- Running Dynamics: Scribe Labs, Wahoo TICKR
- Cycling Dynamics: Could potentially bring clarity to the confusion of duplicate/non-clear metrics
Standards can change

- Trying to boil the ocean never really works
- It doesn’t need to be perfect on the first go, but it does have to be interoperable
- It doesn’t have to encompass everything envisioned, but it should work for those things implemented
- Companies should be certifying/validating with their respective toolsets on ANT+ and BLE
- Don’t be the drunk uncle
Part III: 2014: Carrier Connected Watches
Starting to see 1st generation devices

- Two products this year:
  - Bia women’s focused tri watch
  - Timex GPS One+ running watch
These devices sidestep phone platform issues

- Not limited to Apple or Android for pairing and data connectivity
- Ideal for runners, triathletes (less important for cyclists) – no additional carried item
- Usually do a better job of keeping all devices on same firmware level
- Will ultimately become the standard
- Have international roaming agreements (ideal for travelers)
These devices aren’t perfect though

- Somewhat limited functionality today
- Usually a bit bulkier/bigger
- Have to balance potential layered fees for service
- Can have battery constraints (though, haven’t seen that thus far)
- Susceptible to data usage run-up issues
Part IV:
2014: A few other trends & thoughts
Power meters and the next few years

- Last year I said this was “the year of power”. Apparently, I lied.
- Tremendous price drops over the past 12-18 months
- Even more over the last 45 days, just the beginning
- The conversation *still* needs to shift from watts to ‘what’:
  Education
  - Consumers hear about power, but 95% don’t understand it
  - Look at how other areas of sport are solving the problem
  - Would ‘Power University’ been more beneficial than ‘Cycling Dynamics’?
Activity Trackers

- Seeing the definition of activity trackers evolve
  - Is a smartwatch that does activity tracking an activity tracker?
  - What about a GPS watch that does it?
- Used to be just steps/calorie/distance...
- ...now it’s everything including the kitchen sink
- I still question the long term viability of standalone activity trackers
Action Cameras

- This market has exploded in the past year
  - Including entrants from the non-usual suspect (HTC?)
  - I’m not 100% convinced that it’s a GoPro only world
- Sensor data is quickly becoming norm for non-GoPro
- Seeing potential price divergence however (high and low)
- Last like year, re-use of this data in a smart manner still too complex
  - Record > Transfer via USB > Translate/Process on Computer > Upload to Cloud Service > Download to play from cloud service > Ride on Trainer
’13’14: Five products that excited me...

Here’s five products I’m looking forward to over next year.

- SRM PC8
- The ANT+ Trainer profile
- Recon Jet
- Moxy
- The Garmin FR620 with Running Dynamics
’14–’15: Five products that excite me...and why

Here’s five products I’m looking forward to over next year.

• Smaller action cameras with sensors
• Increased usage/accuracy of optical sensors
• Better convergence of sport watches + smart watches
• Apple Watch
• 4iiii Precision
Biggest Challenges for This Segment

- Integration across platforms
- Device pricing versus phone solutions
- Mobile OS adoption differences for connected devices
- Sensor compatibility
- The Apple Watch
Part V: Ways to work with me
Types of reviews

- ‘First Look’ posts & Initial Hands-On posts
  - Typically trade-show driven posts (not reviews)
  - Last-minute posts, 1-3 days pre-launch (not reviews)
  - Designed to explain product, usually based on pre-release hardware/software

- In-Depth Reviews
  - Full in-depth review with final product/software
A Typical Test Review Cycle

1) Discussions about product, ensuring it’s a proper fit
2) Product Arrives
   A. Unboxing and initial use
   B. 4-12 weeks of usage/beating crap out of it
   C. Information gathering
3) Writing the post
   A. Photos/Content
4) Publication
   A. Responding to comments (I don’t delete comments)
Ways you can engage with me

**Method 1:** NDA discussions/product access, far in advance of product release, private beta feedback.

**Method 2:** Product launch timed review. Pre-availability product usually under NDA until public announcement.

**Method 3:** Post-release review (already in market product). Usually less time sensitive.
Q&A
(I’m here till Friday morning)

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