

“We clearly see the competition coming. We want to keep our leadership position in this space.”

—Charlie Nooney, chairman and CEO of MobiTV, which makes turnkey IP video systems for cable companies, on the company's recent \$50 million funding round.



VOICES: ITERATIONS

AT&T Isn't Even Getting a Useful Brand From DirecTV Deal



Daniel Frankel

THESE DAYS, before any company launches one of the myriad new streaming ventures, you can pretty much guess that it'll end with a “plus” or a “go” — or a “now.”

Of course, the surprising part of AT&T's latest monikers is the utter lack of the name “DirecTV.” HBO Max, the name of the company's upcoming subscription video-on-demand platform, will borrow the branding of a tried and true WarnerMedia asset — one that already has an SVOD user base of 8 million customers through HBO Now.

Meanwhile, screen grabs of internal AT&T communications, recently intercepted by website TheLayoff, reveal that the wireless giant is calling its upcoming premium thin-client pay TV service “AT&T TV.”

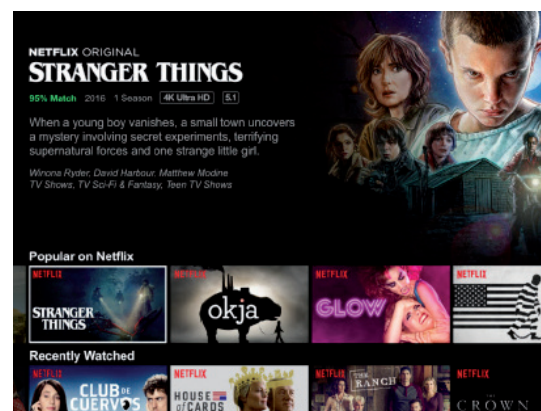
Meanwhile, AT&T chairman and CEO Randall Stephenson said last month that virtual multichannel video programming distributor DirecTV Now will “eventually” be merged into HBO Max.

Meanwhile, AT&T mobility and entertainment president David Christopher, speaking last month at an investment bank conference in London, said DirecTV Now would be downsized to a “thin” service targeting the company's 170 million mobile connections.

“We have emphasized [DirecTV Now] slightly less than we did when it first launched because we are focused more on other elements of the portfolio,” Christopher said.

For those keeping score on AT&T's 2015 purchase of DirecTV, all I can say is that \$67.1 billion doesn't buy you as much brand equity as it used to.

For more from this blog, go to broadcastingcable.com/July15.



NUMBER
32%

The share of Netflix users who would consider switching to an ad-supported tier if it provided a lower monthly price point, per a recent survey of 1,292 Netflix subscribers conducted by The Diffusion Group.

VIDEOPHILE

OTT Has Surpassed DVR Usage in the U.S., Comscore Says

MORE THAN 64 MILLION U.S. homes now use an over-the-top device, up 7% in one year.

That's one of the key takeaways from Comscore's latest State of OTT presentation, which polled the consumption habits of more than 10,000 Americans in March.

In fact, Comscore declares early in its report that OTT is now “mainstream.”

Notably, there are now nearly as many OTT households in the U.S. as there are those using digital video recorders — Comscore said there were about 69.9 million U.S. homes with DVRs in March, up slightly from March 2018.

OTT usage continues to surpass that of DVRs — in March, U.S. consumers watched about 5.5 billion hours of OTT video vs. around 4.6 billion hours of DVR TV.

Another interesting tidbit from Comscore's presentation: Smart TVs are now the fastest-growing delivery mechanisms for OTT video, increasing penetration into U.S. homes by 23% to 29.8 million from March 2018 to March 2019.

Over that span, streaming boxes and sticks increased their infiltration by 9%, to 36.7 million. — Daniel Frankel

There are nearly as many OTT households as there are DVR households

