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This Week's Stories

Netflix Ups U.S. Fees For First Time Since 2015

October 5, 2017

Netflix Inc's U.S. business announced the first rises in monthly fees in two years on Thursday, hiking costs for two of its three main subscription plans as it spends heavily on its own original content. The company's mid-range plan, which allows streaming on two devices at the same time, was increased to \$10.99 per month from \$9.99.

The top-tier plan, which allows streaming on four screens in high definition, was raised to \$13.99 per month from \$11.99. The basic plan fee remained at \$7.99.

Shares in the global streaming pioneer rose as much as 4.5 percent to a record high of \$192.80.

"Most investors believe that Netflix is priced well below its value to consumers and want to see the management continue to increase monetization," Rob Sanderson analyst at MKM Partners said.

In 2011, Netflix raised prices for some customers by as much as \$6, causing more than 800,000 U.S. subscribers to desert the service.

A more gradual move in 2014 did not provoke the same outrage.

Netflix is cheaper than many of its competitors despite the current price hike. HBO Now, the standalone streaming service of HBO that offers access to shows such as "Game of Thrones" and "Veep", is priced at \$14.99 a month, while Hulu prices its service without commercials at \$11.99 per month.

"This price increase will likely be a revenue growth catalyst for the company," RBC Capital Markets analyst Mark Mahaney wrote in a client note.

"The content, not price, is the leading churn/churn-back factor amongst Netflix subs."

The price hikes will only be in the United States and will start taking effect from mid-November, depending on users' billing cycles.

The higher pricing comes as the video streaming service spends heavily on original content and expanding outside the U.S.

Netflix had earlier said it would spend over \$6 billion this year on original shows and expected to have negative free cash flow of \$2 billion to \$2.5 billion.

"The average revenue per user (ARPU) lift is a significant growth driver and important to ... (the) content budget," said Sanderson.

reuters.com



AT&T CEO Makes The Case For Acquiring Time Warner

October 4, 2017

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"The addition of content from Time Warner will drive down costs even further."

Randall Stephenson says his wireless carrier will use targeted advertising to change the TV market and lower prices for consumers.

The biggest benefit of AT&T's \$85 billion acquisition of Time Warner? Cheaper prices for consumers, fueled mostly by more targeted advertising.

That's what AT&T CEO Randall Stephenson said Wednesday at the Vanity Fair New Establishment Summit in Beverly Hills.

Stephenson said not many people can afford the \$110 to \$120 a month cable companies charge for their traditional TV bundle. That's why so many people are "cutting the cord" and are instead subscribing to streaming services like AT&T's DirecTV Now, which allows people to watch their favorite shows via the internet at home on their big screen TVs or on the go on their mobile devices.

Stephenson said AT&T's acquisition of DirecTV was the first step in getting costs down. AT&T's DirecTV Now (when bundled with AT&T) starts as low as \$10 a month for 60 channels of live TV. And the company has already begun adding free access to HBO for its unlimited wireless customers.

The addition of content from Time Warner will drive down costs even further.

"Does the customer get a better deal?" he asked. "The answer is yes."

Stephenson's comments come as stiff competition erodes the company's core wireless business. Smaller rivals Sprint and T-Mobile have been scooping up AT&T's subscribers. It's the same trend that has forced Verizon to make its own acquisitions, although Verizon's bets, like those in AOL and Yahoo, have been relatively smaller ones.

AT&T last year announced its plans to buy media conglomerate Time Warner. Stephenson said he expects the merger to close by the end of the year. He also said he doesn't think President Donald Trump's criticisms of Time Warner's CNN news network is a factor that could potentially kill the deal.

Trump has repeatedly called CNN "fake news" and said when he was candidate that he would try to block the deal.

"I don't know what the relevance of CNN is with an antitrust review," Stephenson said.

How can AT&T afford to give away content and offer bundles at such low prices? While there are efficiencies to be gained from owning both the distribution and the content, the real answer is all about better targeted advertising.

"If you're advertising in the premium video world, you now know where your brand is showing up," Stephenson said. "We think we have a real opportunity here to change the advertising game."

None of this is rocket science, Stephenson said. And AT&T is just one of several companies trying to capitalize on the ability to better target consumers. He said that this new business means the wireless carrier will also be competing with the likes of Amazon.

"I think we're all running very similar plays, just from a different perspective," he said.

He also addressed concerns that AT&T is paying people to give up their privacy in exchange for a lower cost service. He said AT&T has experimented with so-called opt-in policies and that customers have responded favorably to them.

"Customer privacy is very, very important," he said. "But there is a price they're willing to pay to share [their information.]"

cnet.com

Comcast's Skinny Bundle: Internet But No Cable? Meet Xfinity Instant TV

October 4, 2017

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"Customers sign up for a small batch of broadcast channels for \$18 a month with add-on channel packages ranging from \$10 to \$30 extra if you want cable news, sports and entertainment."*

Comcast supplies broadband service to more than 23.3 million households, and in the fiercely competitive world of media and entertainment distribution, that customer base — which represents 45 percent market penetration, a number executives expect will grow — is a major asset the cable giant continues to focus on when rolling out new services.

The latest service from the Philadelphia-based broadcast behemoth is Xfinity Instant TV, Comcast's version of a "skinny bundle."

Customers sign up for a small batch of broadcast channels for \$18 a month with add-on channel packages ranging from \$10 to \$30 extra if you want cable news, sports and entertainment.

Long in the works, news broke last week that the service has launched in select areas and will be rolled out nationwide in the next few weeks.

It will only be available in Comcast's existing footprint — it has rights to distribute some content nationally, but the dynamics of a national service would be tricky to say the least. For now, Xfinity Instant TV is only available to high-speed internet customers with a Comcast Internet gateway. No set-top box is required, as Xfinity Instant TV can be streamed on TV over a Roku box, smartphones or tablets.

The play is similar to its launch of Xfinity Mobile and expands on Comcast's strategy of doubling down on high-value customer relationships in contrast to competitors that offer heavy discounts to a broad base to boost subscriber numbers.

Matt Strauss, executive vice president of Xfinity Services at Comcast, told Multichannel News that expanding to non-customers is part of future plans, but the company is first targeting broadband subscribers who may have been wary of pay-TV packages.

"We very much plan to support that," Strauss told Multichannel News. "But the most value is for customers who take the internet product. That's really where we're focusing our efforts."

There's a hope that by getting those customers to fork over even just a little cash for traditional TV will be a gateway to a full cable package.

Xfinity Instant TV is also being rolled out at a time when broadcast and cable networks are choosing to launch their own streaming options that host just their own content, instead of supplying it to services like Netflix. Disney is in the works to pull all of its content from Netflix to launch its own offering, and CBS' All Access is an OTT option where viewers can watch content like the new Star Trek series for \$5.99 a month.

With so many options for customers to get the content they want, Comcast executives have often repeated its goal of being the “aggregator of aggregators,” where subscribers can get everything they want, including YouTube and Netflix, in one place. Even AMC and FX Network’s individual subscription services are only available to existing cable customers since distributors have the built-in capabilities to launch them. It is worth noting many of the channels offered through Xfinity Instant TV’s basic bundle are broadcast networks, meaning they’re available for free with a digital antenna (apparently a little-known fact to some millennials), but Comcast’s offering ensures clear signals and the ability to easily add-on cable networks.

“There are 5,000 streaming OTT apps in the market today. Consumers are confused. Nearly 50 percent of total TV viewing is still broadcast channel viewing,” Laura Martin, senior equity analyst at Needham said at a conference last week, as reported by Forbes. “What Xfinity Instant TV offers cord cutters is an \$18/month trial of the most popular channels in the larger TV bundle, which could be a stepping stone to a larger, more traditional TV bundle. For Comcast, this new skinny bundle should create a competitive advantage for its high speed modem product.”

bizjournals.com

Products & Services

Google Pixel Buds Are Wireless Earbuds That Translate Conversations in Real Time

October 4, 2017

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“The Pixel Buds will use Google Translate to comprehend conversations in 40 different languages.”

To accompany the new Pixel smartphones announced Wednesday, Google debuted new wireless earbuds, dubbed “Pixel Buds.” These are Google’s first wireless earbuds that are built to be used with Pixel smartphones, but they also give users access to Google Translate so they can have conversations with people who speak a different language.

Unlike Apple’s AirPods, the Pixel Buds have a wire connecting the two earpieces. However, that wire doesn’t connect to a smartphone or other device. Pixel Buds will pair via Bluetooth to the new Pixel smartphones—and presumably any other devices that accept Bluetooth wireless earbuds. All of the Pixel Buds’ controls are built in to the right earpiece, which is a common hardware solution on wireless earbuds. You can access Google Assistant by tapping or pressing on the right earbud, and the Assistant will be able to read notifications and messages to you through the Buds.

But the most intriguing feature of the Pixel Buds is the integrated Google Translate feature. Demoed on stage at Google’s event today, this feature lets two Pixel Bud wearers chat in their native languages by translating conversations in real time. In the demo, a native English speaker and a native Swedish speaker had a conversation with each other, both using their native languages. Google Translate translated the languages for each user. There was barely any lag time in between the speaker saying a phrase and the Buds’ hearing those words and translating them into the appropriate language.

The Pixel Buds will use Google Translate to comprehend conversations in 40 different languages. This is a unique feature that only a company like Google could integrate into wireless earbuds, thanks to the existing Google Translate data and infrastructure.

Pixel Buds have a battery that should last five hours on a single charge, which is average for wireless earbuds. They also come with a charging case that can hold up to 24 hours of battery life. Google’s Pixel Buds are available for preorder today for \$159.

arstechnica.com

Need To Quick Charge Your iPhone? Grab This iPad Adaptor

October 2, 2017

Apple's USB-C quick charging is promising, but for now, nothing beats an iPad power adapter to juice up your iPhone 8 quickly.

Apple's iPhone 8 features quick charging, which is great, because slow charging has long frustrated iPhone owners. We tried three different chargers and found that Apple's \$19 iPad charger offers the best balance of fast charging and low price, using cables you already own.

Charging speed doesn't increase linearly as you pump more juice into a battery. To keep batteries safe, they're limited in terms of the energy they take in at once.

To prevent accidental explosions, they take in less energy per minute the more full they get—that's why it's much easier to fill your phone from 0-50 percent than from 90-100 percent.

Putting bigger chargers on your iPhone is going to result in faster charging, but there's a curve involved.

Using the 5W charger which comes with the iPhone 8 Plus, we filled 38 percent of the battery in an hour. That's the kind of performance that has frustrated iPhone owners in the past—plugging in a dead phone for half an hour and having to walk away with only 20 percent or so of charge.

Using a \$19 12W iPad adapter with the iPhone's included USB-to-Lightning cable made a huge difference. Now, one hour charged us to 72 percent.

In terms of currently available chargers, we really consider that to be the sweet spot, but it isn't by a long shot the quickest charging available. For that, you need a USB-C cable and power adapter.

We tried an Anker 30W PowerPort Speed, which uses USB-C power delivery to pump out 30W worth of power and should really accelerate charging.

Unfortunately, the iPhone doesn't come with a USB-C cable, and the only one certified for power delivery is Apple's \$25 USB-C-to-Lightning cable. So that brings the charge for your charging up to \$46.59.

It's also not that much faster. In one hour, we filled 84 percent of our iPhone 8 Plus battery using the USB-C charger. Yes, that's more than the iPad charger accomplished, but not, in my mind, enough to justify the added cost.

The cost, really, is the problem for us. If the iPhone came with a USB-C cable, the faster Anker charger would absolutely beat the iPad charger. But at \$25, that's an expensive cable.

Dedicated USB-C-based iPhone fast charger sets and better, cheaper cables will probably come out over the next year. But for now, that iPad brick brings you the best bang for your buck.

pcmag.com

Emerging Technology

Panasonic's New Kitchen Gadget Will Measure Meal's Calories In Just 10 Seconds

October 6, 2017

Counting calories from an app can be pretty inaccurate, so this kitchen gadget is set to be a godsend for dieters.

Japanese electronics conglomerate Panasonic just showed off a prototype of its tabletop calorie counter dubbed CaloRieco.

All you have to do is pop a plate of food into the microwave-sized device, press a button on the lid, and 10 seconds later you'll get an overall calorie count of your meal. Impressively, it's also able to deliver a breakdown of your meal into carbs, fat and protein — great for people watching their macros.

The machine will connect via Wi-Fi to the cloud, where you can get your nutrition profile to a companion app.

Panasonic isn't going into detail about how the machine works, but just says it uses an infrared scanner to measure your food. It also has a weighing scale within, so presumably it figures out the makeup of a dish by calculating backwards.

Still, to do all that in 10 seconds seems quite astounding. Traditionally, labs measure food calories by measuring how much heat it gives off in burning, which takes a little longer.

The CaloRieco was just shown off at CEATEC in Tokyo this week, and was first exhibited as a concept at SXSW in May this year. No word on how much it'll cost, or when you can buy one, but we imagine interest will be high when it hits the market.

mashable.com

How Big Data Could Help Prevent Fatal Heart Attacks

October 5, 2017

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"This cardiac activity can be reviewed and interpreted in real time using mobile smartphone networks and cloud storage."

To celebrate World Heart Day, which was on Sept. 29, today I will join the American Heart Association Conference, AHA Health Tech & Innovation Forum to discuss how emerging technologies can transform and create healthy communities.

According to the American Heart Association, approximately 2,200 Americans die of cardiovascular disease each day, an average of one death every 40 seconds. In fact, cardiovascular diseases claim more lives each year than all forms of cancer and Chronic Lower Respiratory Disease combined. Even more alarming is the fact that about 92.1 million American adults are living with either some form of cardiovascular disease or the after-effects of a stroke. The direct and indirect costs of cardiovascular disease and stroke are reported to total more than \$316 billion, which includes loss of work and the healthcare costs associated with stroke and cardiovascular disease.

One of the contributing factors to these staggeringly high and alarming statistics has been the inability to monitor heart rhythms of patients with cardiovascular disease until they arrive at an emergency room by ambulance. Of course there are also cases where, unfortunately, the patient had already died of an acute stroke or heart attack.

Electrocardiographs or 12 lead ECGs are used every day to capture cardiac activity and they produce a graphic record of the heart's electrical potential. Results from this can be plotted against the time a patient spends either in hospital or at the doctor's office. This electrical display of human heart activity is used to diagnose and assist in treating heart disease and cardiac arrhythmias. However, this is not a very foolproof way to test if the person has had a heart attack or not, and the results are often not accurate.

Using Smartphone Apps To Prevent Cardiovascular Diseases

Technological advances today mean there are now small adhesive patches that can be fixed to a person's torso that feeds data into a remote patient monitor. This cardiac activity can be reviewed and interpreted in real time using mobile smartphone networks and cloud storage. A patient's cardiac wave activity can be transmitted via Wi-Fi to digital data hubs or individual diagnostic and treatment facilities where data can then be interpreted.

If clinically indicated, caregivers can be notified and can then intervene to prevent adverse cardiac events. Moreover, patients experiencing heart attack symptoms can activate their mobile phone remote patient monitoring application to capture cardiac rhythm data associated with their chest pain, thus also alerting their doctor at the same time. This new remote cardiac monitoring capability is saving lives and also lowering the cost per capita for treating patients with cardiovascular disease.

In 2016 alone, the remote patient monitoring market tracked a 44% increase in remotely monitored cardiac patients. This translates to some 7.1 million patients enrolled in some form of digital health platform. Analysts project a seismic growth in remote cardiac monitoring with patients using their own smart phones for connectivity.

Remote Cardiac Monitoring

With the emergence of a miniaturized single lead ECG sensor like the technology developed by LifeWatch, the traditional patient monitoring industry is being forced to pivot 180 degrees to meet demand from consumers and investors alike to provide remote continuous cardiac patient monitoring services.

Furthermore, new remote cardiac monitoring companies are saturating the traditional patient monitoring industry vertical which has been dominated by such medical device giants at Philips and General Electric for decades.

New market entrants like iRhythm and Preventice Solutions are capturing market share. iRhythm and Preventice are going a step further offering interpretation of remote cardiac monitoring data via their data center configuration and individual diagnostic treatment facility (IDTF) designation.

What Can We Expect In The Future From Healthcare Players?

In the near future, we expect smartphone manufacturers, such as Apple and Samsung, to begin introducing an array of physiologic sensor application capabilities to monitor blood pressure, cardiac arrhythmia, heart rate, and stroke volume.

This march of digital remote cardiac monitoring capabilities will act as a catalyst, moving the entire healthcare ecosystem closer to true digitalization much faster than previously thought.

The challenge, and it is immense, is to see how the healthcare continuum can securely store and analyze the seismic amount of cardiac data being generated via digital patient monitoring. Is the IBM Watson collaboration with healthcare big data models up to this task?

Or, will artificial intelligence applications and machine learning advances solve this conundrum independently and begin diagnosing and looking after patients, eliminating the need for human interpretation and oversight?

Companies like IBM, Optum, and Hitachi are working tirelessly to harness what are called "population health analytics" to increase the predictive power for stroke and heart attacks so that we may reduce the morbidity and mortality statistics for cardiovascular disease in America. This is why remote cardiac monitoring holds so much potential for saving lives and for lowering the cost of healthcare for all Americans.

forbes.com

Nura's Headphones Custom Fit Music To Match Your Hearing

October 4, 2017

When it comes to listening to music, most headphones are equivalent to an audio "magnifying glass" -- they amplify whatever sound is fed into them. Nura and its semi-eponymous Nuraphones (\$399/£349) aim to be more like prescription specs for your ears, by analyzing your hearing and creating a bespoke audio profile. It's an interesting idea, and an even more interesting design.

The Nuraphones determine your personal hearing profile by listening to "otoacoustic emissions" -- sounds emitted by the inner ear when stimulated -- with a tiny microphone. These emissions reveal a lot of info about our hearing, enough that Nura believes can be deciphered into a sort of hearing "fingerprint." Nura takes this fingerprint and uses it to adjust the audio signal from the headphones.

The end result is a bit like a personal EQ setting, without all the guesswork, designed to make music sound like the artist intended (rather than amplify arbitrary frequencies).

It's a tantalizing prospect: Corrective headphones that know the quirks and failings of your beleaguered ears. When we wrote about them last year, I'll admit I was skeptical. Pretty much every headphone pitch I have ever had (and that is many) has espoused the virtues of its revolutionary audio, be it custom drivers, magical sound engines, dynamic doo-dahs or cutting-edge EQ algorithms and so on. But none of that helps if you're not able to hear all of those sounds and frequencies equally.

Setting up the Nuraphones is a bit more involved than most other headphones (in that there's even a setup process at all), but it's simple. Using the companion app (iOS/Android), you are first guided to make sure you have the headphones placed on your head correctly. Nuraphones have an unusual configuration that we'll get into later, but this makes it important to have them on just right during setup.



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"The Nuraphones determine your personal hearing profile by listening to "otoacoustic emissions" -- sounds emitted by the inner ear when stimulated - with a tiny microphone."

Once you have them on properly, the app plays some audio that sounds a bit like a futuristic fax machine. This doesn't last long, but it soon moves onto the next stage of configuration, which takes a little longer. All in all, it takes about a minute. Once complete, you can save your profile and forget about it if you wish.

Naturally, the first thing I wanted to know was how it sounded without the custom profile. Fortunately, this is easy to do in the app, as there's a switch to toggle between generic and custom audio. I'll be honest, the difference was incredible. In the generic setting, the audio sounded actually pretty bad. But once I put on the custom profile, the music sprang to life.

The first thing you notice is that the music is louder. This alone -- a simple bump in volume -- is often enough to "trick" the brain into thinking something sounds better. (There's an old DJ trick of casually lowering the volume on the previous DJ's last record so that your first one invokes the same feeling.) I could tell straight away though that there was more going on here. The music didn't just sound louder, it sounded more "complete." All the different frequencies in the music felt balanced and natural, and not "juiced."

After listening to a number of different tracks in different styles, I was actually somewhat excited. There's an intangible, magical feeling you get when listening to well-recorded audio on a high-end system. This isn't quite the feeling I had here, but it was similar. A sense that music feels alive -- clearer, almost.

The Nuraphones have a few other features that help the music along, too. While they look like over-ear headphones, each cup has a protruding "stalk" that goes inside your ear. Both the outer section and in-ear part provide passive noise canceling, so the effect is doubled. In a room with people talking right in front of me (and no music playing), I couldn't hear a thing.

The second trick that Nura added, is tactile bass. Inside the on-ear part are transducers that respond to low frequencies (bass) with vibrations. It's not just an on/off vibrate, it's responsive to the frequency. Similar to how SubPac or Basslet work. The idea is that you "feel" the bass while the in-ear part focuses on the midrange and upward. It works very well (trust me), and I'd love to see this option in more headphones. If you're wondering, you can disable the "immersion" feature (as Nura calls it) or, conversely, go wild, and jack it right up to face-melting levels.

By now, you can't help but have noticed that these are no regular headphones. The design alone will tell you that. When I first saw the two in-ear drivers poking out of the cups, I didn't know what to make of them. Each stalk is spring-loaded, so it doesn't poke you in the side of the head (or push into your ear too hard). The spring is cleverly engineered so it retracts/extends slowly. The upshot is that sometimes you adjust the headphones and then feel the tip of the stalk slowly worm its way into your ear canal. You might also have noticed these stalks are... mildly "anatomical" looking. It's a little weird, but not unpleasant.

I did find myself having to readjust the Nuraphones a fair amount. Not constantly, but maybe two or three times an hour I'd find myself reaching for either side just to get it in a slightly sweeter spot. The earbud stalks aren't uncomfortable, but it's more about making sure you have them inserted properly, so it becomes a bit of an unconscious twitch to be sure you have them set right.

The Nuraphones' weird earcups aside, the product experience as a whole is thoughtfully designed. The rubber sections that rest on the side of your head can detect when you're wearing them. This is, in fact, how you turn the Nuraphones on -- simply put them on your head. There are two touch-

sensitive buttons "hidden" in the circular caps outside the strap (where you adjust the fit). These can be configured in the app to do whatever you want.

There's likely a compromise here, as you'll have to choose between skipping tracks, audio profile toggling, answering calls ... whatever the two things you need the most. I often want to pause or adjust the volume on the go, but obviously want to be able to answer calls too, without reaching for my phone. There's no button to activate Bluetooth mode, either. Anytime the headphones aren't connected, they default back to pairing mode.

This minimalist approach feels smart when it works. But if you need to toggle Bluetooth (as I sometimes did) or want to reboot the headphones (as I sometimes did), it's a bit of a guessing game - setting them down for a bit and putting them back on. Likewise, occasionally I'd lift one earcup off to talk with a friend, and the headphones would turn off. They'd reconnect again in a few seconds, but it's a minor break in the experience.

For those who prefer a wired connection, you have plenty of options here. The Nuraphones come with a USB A cable for charging, but there are USB C, micro-USB, Lightning and 3.5mm audio cables available too (for an additional cost).

Despite the minor quirks, the whole experience feels refined. Smart, even. And it'll likely only get better. A feature in beta is that the headphones can detect who's wearing them (if they have a profile set in the app). I tested this with my wife, and it works well -- telling me "Welcome back, James" every time I put them on. You also don't need the app once you've gone through the setup -- the settings are stored on the headset, so you can forget about it completely if you prefer.

If you're wondering, you can have up to three different profiles set in the app. It's also a good way to see how different your hearing is to someone else's. I tried my wife's profile, and it actually sounded pretty similar. Both mine and hers sounded pleasing, but mine did sound better (to me). I noticed higher frequencies were a little harsher in my partner's setting, and mids a little subdued.

On a more practical note, in wireless mode the Nuraphones last about 20 hours, which is decent. You can also use them with your PC without the 3.5mm cable. When you plug them in via USB, your computer should detect them as an audio output device, so you can easily charge them while listening at work. It's worth noting here that there's no LED, so without the app, it can be hard to know if they are fully charged.

For a debut product, the Nuraphones are impressive. The audio voodoo really does add a depth and a sense of clarity to music that almost makes you worry that you must otherwise be slugging through the world hearing the world only half as brightly as you could. The tactile bass adds another dimension (and means you need less volume), though your personal preference may vary with this one, and the slick design touches make this feel like a polished product.

But they also introduce a few minor compromises or design quirks that might take some getting used to. If you can live with relinquishing control over connectivity and power to the headphones, you've got little to worry about. At \$399/£349, the Nuraphones aren't the cheapest on the market, but they deliver an experience (and musical excitement) that's unique.

engadget.com

Mergers and Acquisitions

Walmart Acquires NYC Delivery Startup Parcel As Amazon Battle Heats Up

October 4, 2017

Walmart has acquired Brooklyn-based delivery startup Parcel, the retail giant's sixth technology startup acquisition in the past 14 months.

Terms of the acquisition were not disclosed, but the deal closed on September 29.

Founded in 2013, Parcel is a "last-mile" delivery platform designed to help ecommerce companies get their goods to customers' doors. It operates around the clock, delivering packages in scheduled two-hour windows, overnight, or on the day an order is placed.

The online/offline retail war has taken an interesting turn over the past few years. After edging into groceries and other household goods, Amazon laid down the gauntlet to brick-and-mortar rivals such as Walmart when it announced it was buying supermarket chain Whole Foods in a \$13.7 billion deal.

Walmart has been bolstering its ecommerce credentials, too, and acquisitions are also playing a key part of its strategy. Last August, Walmart confirmed it was buying online retailer Jet.com for \$3 billion in cash, and Walmart has since snapped up online clothing retailer Shoebuy for \$70 million, active outdoor retailer Moosejaw for \$51 million, women's online fashion retailer ModCloth for an undisclosed amount, and mens clothing brand Bonobos for \$310 million.

Parcel launched in New York back in 2014, and it hasn't expanded into other markets yet. It had only raised around \$2 million in seed funding — so it's unlikely Walmart paid crazy money for the startup.

Indeed, Walmart stated that the acquisition price was "smaller than previous acquisitions we've made this year," which suggests it was less than \$50 million, and it was likely significantly less.

In terms of what Walmart has in store for Parcel, well, it probably won't surprise you to learn that it plans to use Parcel's platform for last-mile deliveries in New York City, covering "general merchandise" as well as "fresh and frozen groceries" from both Walmart and Jet. However, Walmart is seemingly keen to continue serving Parcel's existing clients, as well. "Parcel has partnerships with several meal kit, grocery, and ecommerce companies, and has delivered more than 1 million meals in the past two years," Walmart said in a blog post. "So our immediate plan is for Parcel to continue serving its existing clients and growing its customer base."

venturebeat.com

Amazon Has Acquired 3D Body Model Startup, Body Labs, For \$50M-\$70M

October 3, 2017

TechCrunch has learned that Amazon has acquired Body Labs, a company with a stated aim of creating true-to-life 3D body models to support various b2b software applications — such as virtually trying on clothes or photorealistic avatars for gaming.

One source suggested the price-tag Amazon paid for Body Labs could be \$100M+. However a second well-placed source suggested it's closer to \$70M than \$100M — so we're pegging it at between \$50M and \$70M.

An Amazon spokeswoman declined to comment on the acquisition.

New York based BodyLabs was founded in March 2013, according to CrunchBase, and had raised more than \$10M across two investment rounds — closing an \$8M Series A in November 2015.

The company says its AI, computer vision, and body modeling expertise stems from research started at Brown University and the Max Planck Institute for Intelligent Systems.

Co-founder and CEO Bill O’Farrell lists a number of prior exits in his Body Labs’ bio: namely SpeechWorks, acquired by Nuance; CoSA acquired by Adobe; and OpenAir acquired by Netsuite.

Apparently he can now chalk off a fourth.

At the time of writing BodyLabs had not responded to requests for comment. The company’s social media accounts have been quiet since August, which may indicate the deal closed recently.

Modeling The Human Body

Video demos on Body Labs’ website show its tech being used to augment a human with digital content as the person moves around by cladding them in a full-body gaming avatar ‘suit’ or adding boxing gloves and bunny slippers to a dancing man.

Body Labs also says its “SOMA Shape API” can be used to “accurately predict and measure the 3D shape of your customers using just a single image”, suggesting this can power “custom apparel” or be used by fashion ecommerce retailers wanting to offer sizing recommendations.

The company also suggests additional uses-cases for its ‘fat and all’ 3D body modeling tech in health and fitness tracking, and even equipment design and manufacturing.

In a video from 2015, O’Farrell suggests highly accurate 3D body scans will enable “the body itself [to] be delivered as the platform and around which goods and services are designed, manufactured, bought and sold, recommended.”

It’s not clear exactly what Amazon intends to do with Body Labs but there are plenty of potential use-cases that mesh with and could extend its existing business interests if the startup has the tech chops to deliver accurate 3D body models at scale.

For example, as well as selling other brands’ clothes via its ecommerce marketplace, Amazon has been ramping up its own fashion business in recent years, expanding and growing its private label fashion brands.

Being able to offer custom fit could give Amazon’s private label fashion brands an edge, even as improving sizing predictions generally for Amazon shoppers could help drive clothes shopping across its platform and help shrink returns from clothes that don’t fit.

A recent Amazon Prime member perk offers free returns for a try-before-you-buy clothes service called Amazon Wardrobe. And the service would clearly be cheaper for Amazon to run if fewer people returned fewer items of clothes.

CEO Jeff Bezos has long listed fashion as one of two key areas he sees underpinning his sizable ambitions for Amazon’s ecommerce empire (food being the other).

The company also has big extant interests in another potential area where Body Labs' tech could fit: gaming.

It runs its own games studios — fed by earlier acquisitions such as Double Helix Games, which it picked up back in 2014. It also distributes Lumberyard, a free AAA game engine integrated with AWS and Twitch; and offers GameLift, a managed service for deploying and managing servers for multiplayer games.

This summer it emerged the company had acquired GameSparks, a “backend as a service” for games developers too. So it has a well established interest in pushing the envelope on video game content — say by being able to offer gamers photorealistic avatars.

And that doesn't even scratch the surface of how 3D body model technology could play in the VR world, if you're taking a longer view on potential use-cases. (Or indeed, for AR and AR gaming purposes.)

Games is generally an area of strategic interest for Amazon not only because the content can be highly popular and lucrative in its own right, but as another way to drive usage of its cloud computing division, Amazon Web Services.

The more content it can host, the more revenue AWS can generate.

Yet another potential use-case for 3D body model tech could be in the comms space where Amazon has recently been making a new play, including in the visual communications space — as part of a much bigger push to own the smart home by releasing a blitz of connected devices housing its Alexa voice AI.

This May Amazon outted an Echo device with a screen aimed at family videocalling.

Oh Hey There, Echo Look

It has also released another Echo device (called Look) that's specifically designed for taking style selfies. So it's possible the company might be interested in tech that can power visual transformations for fun and fashion-based purposes — such as by being able to add real-time effects to people's faces and bodies during an Echo Show videocall, for example, a la Snapchat selfie lenses.

And Body Labs has a mobile AI called Mosh for adding special effects photos using based on its tech detecting and adapting to the person's pose.

Or — for more practical, ecommerce-related purposes — to enable users of its Echo Show to virtually show off a fashion item they're thinking of buying by having computer vision software digitally animating it on a photorealistic body model. So they could, for example, ask their mum for a second opinion on the dress they've been eyeing up — and then just ask Alexa to buy it.

How Amazon could do much more with Echo by adding a camera to drive blended reality into the living room was a topic TechCrunch dug into back in 2015.

However one key consideration here, in the specific case of Body Labs, is it's not clear exactly what core technology the company is using for generating accurate 3D scans.

In some of its video demos Body Labs can be seen using person-sized scanners to generate highly accurate body models — a technology that clearly does not scale for the kind of massive consumer purposes Amazon would be after. Though it also claims to be able to extrapolate body models from “everyday photos or videos”.

One of its co-founders, and also its science advisor, Dr Michael Black, is a computer vision expert who has worked on modeling realistic 3D human avatars by extrapolating pose data from photos — and that kind of approach, if it proves robust enough, would offer a more viable route for Amazon to scale viable body models to millions of consumers.

So it's also possible the Body Labs acquisition is mostly an acquire for Amazon, aimed at picking up talent and expertise for handling the data it's hoping to gather via its Echo Look device which — notably — contains an on-board depth sensor so could be used to extract 3D data on body form via users' style selfies.

As we wrote in April, the Echo Look style selfie device very much looks like a way for Amazon to harvest people's full length selfies to start to build its own dataset for size and fit, which neatly dovetails with its ecommerce fashion ambitions.

Bezos could therefore be hoping to put Body Labs' team to work on reverse engineering the body data it pulls off Echo Look and arrive at a viable accurate 3D body models without consumers needing their own shower-sized in-home scanners. Instead they'd just need to have an Echo Look sitting on their shelf.

techcrunch.com

Industry Reports

AT&T, Verizon To Lead U.S. Fiber Spending Charge, But Altice And Comcast Are Gaining Ground, Says Analyst

October 2, 2017

AT&T and Verizon have clearly set the pace for fiber network spending in the United States with wide-ranging plans to satisfy a broad set of consumer and business wireline and wireless needs.

Deutsche Bank Markets Research said in a research note that traditional incumbent service providers are being more open about discussing their fiber network expansion plans.

"Telecoms have become much more public signaling their intent to increase fiber investment, with AT&T and Verizon leading the spending ramp," said Deutsche Bank Markets Research.

After establishing its "One Fiber" initiative, Verizon signed two key fiber supply deals: it will spend \$1 billion with Corning to buy 1.5 million miles of fiber over three years and a \$300 million deal with Prysmian to buy 1 million miles of fiber over 3 years.

AT&T is being no less aggressive.

As part of a deal with the FCC for AT&T to acquire DirecTV, AT&T committed it would connect 12.5 million homes with 1 Gbps-capable FTTH network services by 2019. The service provider has connected over 5.5 million homes with hopes to connect a total of 7 million by the end of this year.

Interestingly, AT&T said it might reach close to 14 million by 2019.

Meanwhile, CenturyLink has set a 3-year spending plan, committing to rolling out 100 Mbps and higher speed broadband services from 2 million homes passed in 2016 to over 10 million homes passed by 2019.

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"As part of a deal with the FCC for AT&T to acquire DirecTV, AT&T committed it would connect 12.5 million homes with 1 Gbps-capable FTTH network services by 2019."

“CenturyLink expects capital intensity to remain 16% and during our channel checks, one telecom contractor indicated a slowdown in spending for CenturyLink over the near term,” Deutsche Bank said.

Overall, Deutsche Bank said that “telecoms/cable companies have indicated that they expect the fiber investment cycle to last at least a decade.”

5G, FTTH Remain Catalysts

What’s driving the ongoing fiber expansion plans is the ongoing mission to have converged networks that simultaneously support FTTH and 5G wireless services.

“To support the upcoming innovations such as autonomous driving, IoT, smart cities, the US needs to densify its fiber network,” Deutsche Bank said.

“The US fiber penetration rate is 20% vs. 75% for leading OECD countries, which suggests a large gap needs to be closed.”

Deutsche Bank said in order to achieve these goals, its “proprietary top-down fiber model suggests spending on fiber to the home will total ~\$175B over the next decade (an additional \$25-30B will likely go towards 5G).”

Verizon and AT&T are clearly leading this charge with plans to either build out and augment existing fiber routes by building their own facilities, renting, or purchasing regional assets.

“Telecom/cable companies are increasingly talking about the convergence of fiber to the home and the 5G rollout as one large investment cycle that will likely ramp further in 2018,” Deutsche Bank.

AT&T has maintained the idea that cost will determine whether the service provider will build or buy.

Depending on the market needs, Verizon also plans to look at either building its own fiber or purchasing fiber from others to support 4G and future 5G deployments outside of its wireline territory.

Matt Ellis, CFO of Verizon, told investors during the Bank of America Merrill Lynch Media, Communications & Entertainment Conference that the service provider will consider whether to lease, buy or build, dictated by the business case it’s trying to prove out.

“As we add fiber—and I think we’ve been pretty consistent in this—we can buy existing fiber, we can build fiber, or we can lease existing fiber,” Ellis said.

“I think it is going to be geography by geography will determine what the best and cost-effective approach will be to add the capacity and generate the returns off of.”

Altice, Comcast Get Aggressive

While AT&T and Verizon are moving forward with their fiber plans, telcos will continue to face growing competitive service threats in the consumer and business domains.

Comcast and Altice have set some aggressive fiber spending patterns to accelerate consumer and business broadband expansions, for example.

Comcast continues to drive fiber into its network to support its ongoing DOCSIS 3.1 rollout across multiple states.

Specifically, Comcast announced in August that it was rolling out DOCSIS 3.1 gigabit speed internet service in four markets, including Philadelphia, Boston, Washington, D.C. and the entire state of New Jersey, among other areas.

The DOCSIS 3.1 footprint now also includes Northern Delaware, Baltimore and Charlottesville, Virginia. At the time, Comcast said additional markets will be “deployed on a rolling basis through the fall.”

“Comcast continues to push fiber deeper into its network, is rolling out DOCSIS Duplex over the next 24 months and indicated its capital intensity is in the 15% range,” Deutsche Bank said.

At the same time, Comcast is using its DOCSIS 3.1-based internet service across its northeastern footprint and its growing fiber network to bolster its pending SD-WAN plans for business customers.

Not content to follow the same path as other cable MSOs, Altice has set a goal to deploy fiber to 1 million newly constructed homes in New York, New Jersey and Connecticut by the end of 2018.

As part of its plan, Altice pledged in August to deploy FTTH gigabit-speed services across its Optimum footprint—as well as into some Suddenlink homes and businesses—by 2021. However, it continues to use DOCSIS technologies to expand gigabit-speed services in its acquired Suddenlink service areas.

Already, cable’s bets on expanding broadband availability and fiber are paying off as cable continues to crank up its broadband subscriber base. During the second quarter, cable operators added a total 230,000 of subscribers.

fiercetelecom.com

Apple’s iPhone X Could Make Samsung Big Bucks

October 2, 2017

Samsung could profit more from Apple's phone than it does from its own.

Apple and Samsung may be two of tech's biggest frenemies, but both of them are rooting for the iPhone X.

For every iPhone X Apple makes, Samsung is estimated to earn \$110 (roughly £83/AU\$140), due to the Samsung-manufactured OLED displays and memory chips that go into each device. In fact, if the iPhone X strikes it rich, Samsung may make more money off of iPhone sales than it does off of its own Galaxy S8, according to a analysis by Counterpoint Technology (via The Wall Street Journal).

Despite the never-ending legal battles and competing top-tier phones, the two tech companies may rely on each other more than you'd expect.

Samsung is one of the world's main suppliers of OLED screens. With the iPhone X introducing OLED to iPhone for the first time, Samsung is an obvious choice. And while Apple's phones get their fancy new screens, Samsung makes a healthy profit in the process.

Counterpoint's analysis estimates that Apple will sell around 130 million iPhone X's in the 20 months after its debut. If Samsung makes \$110 per iPhone, that puts the earnings at \$14.3 billion (about £10.8 billion/AU\$18.3 billion).

The same research firm claims that Samsung makes \$202 off of components for the Galaxy S8, and estimates 50 million devices sold in a 20-month period. Putting the S8 earnings at \$10.1 billion (£7.6 billion/AU\$12.9 billion), over \$4 billion less than the iPhone estimate.

Although this is good news for Samsung, Apple is reportedly looking into other manufacturers to source its OLED displays. The only problem is that Apple can sell hundreds of millions of iPhones every year, so its manufacturers would have to be able to keep pace with similarly huge numbers.

Currently, few suppliers can keep up with the amount of OLED screens that Samsung can produce. In the meantime, Apple may have to play nice with Samsung, especially if it wants to make more OLED iPhones in the future.

The iPhone X will release on Nov. 3, with preorders starting on Oct. 27.

Apple did not respond to a request for comment and Samsung declined to comment on this story.

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