

TiVo's first Android TV dongle also appears to be its last

Last May, TiVo attempted to muscle in on Roku and Amazon with an HDMI streaming dongle of its own – the \$70 TiVo Stream 4K, which traded in the company's traditional live TV + DVR functionality for the likes of Sling TV, Netflix, HBO and YouTube. It now appears that attempt was so unsuccessful, the company's planning to abandon its Android TV dongle efforts entirely.

Xperi Holdings CEO Jon Kirchner explained in an earnings call (via *Zatz Not Funny*) that it no longer feels it can compete using Android TV – the company likes to think its differentiator is a content guide that surfaces and lets you search for shows and movies across a variety of apps, but now that Google's already baked something like that into its new "Google TV" layer on top of Android TV and sells it for just \$50, TiVo doesn't see much of a future there.

Here's Kirchner, as transcribed by *Seeking Alpha*:

Sure, so originally as we approached the combination, we have done a lot of planning around kind of a three phase approach, starting with the Stream 4K product, which is a dongle that attaches to TVs, moving into an embedded application, where we'll be let's say the preferred user interface choice on a broader platform but originally around the notion that it would live on top of Android TV.

And then thirdly, going all the way into a much deeper embedded solution, embedded OS where we're a bigger provider,

where we're really the sole primary interface for the broader content search and discovery and engagement. What has changed is last fall, Google came out and said that they intend to go beyond their core OS level offering and really get into the UX business, and in so doing it eclipses one's ability to I think reasonably be an alternative that might otherwise live on their lower level platform.

Instead, says Kirchner, he wants to embed TiVo smarts directly in TVs – a strategy that's worked pretty dang well for Roku, and where Amazon has been competing with Fire TV Edition sets for a few years, too.

Here's the thing, though: while the Stream 4K was well-reviewed, *it wasn't the user interface* that reviewers liked. Some of its most glowing reviews called it cluttered or confusing compared to the competition, and most concluded that it was just fine compared to slicker offerings from Roku and Amazon at or under that price. TiVo dropped the starting price of the Stream 4K to \$50 at launch, and reduced it to \$39 in December after Google's \$50 Chromecast had arrived.

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