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HEARD ON THE STREET | JUNE 30, 2009

Cable Hits a Big Winner With DVRs

Article

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Mark Johnson wrote:



There shouldn't be a problem with hundreds of thousands of subscribers recording at the same time. All the central servers are going to do is record every show on every channel, and when a subscriber "records" a show, all the cable company has to do is link the subscriber's pick. The cable company only has to make one recording to satisfy the thousands that will want to watch any given show. They could allow "post-broadcast" recordings for popular shows, or delete recordings that nobody has pre-selected.

The only question then is how long they store the programs. Do they keep a show archived until the last person that selected it decides to delete it from their list? Or do they automatically delete them after a couple weeks? I know satellite DVR users that keep programs stored for months.

[Link](#)

7 days ago

William L. Ball, Jr wrote:



Great story and coverage.

[Link](#)

6 days ago

RODNEY MASON wrote:



Four Giant Leaps to Ubiquitous TV Viewing

- 1) The ruling that enables a centralized DVR system for cable providers is a giant leap toward "ubiquitous viewing."
- 2) TV everywhere, allowing viewers the opportunity to use a password to access cable over the internet is an even bigger second leap and prototypes and tests are in the works for this fall.
- 3) Smart phones, which will soon surpass computers as the number one way US consumers access the web, as cell phones outnumber computers 3 to 1 and smart phone penetration is in the double digits and accelerating, is the third.
- 4) Unleashing the 700Mhz spectrum, vacated by TV's migration to digital, or another higher speed, broad reach frequency that's always on and available virtually everywhere is the fourth.

Once we clear those four hurdles which are all ready in progress, it's going to be difficult for cable to survive. That's because entertainment companies will be able to directly reach and generate revenue from every viewer of their content.

When content is everywhere, always on, when the viewer wants it, advertising will migrate to location-based messaging that is intuitive and user-smart. Products like Klickable that already exist, will allow viewers to click on items they see in the video, without disrupting, for further information and links to purchase. That technology married with another existing platform like Deal Chime, that delivers digital coupons and messages to any device, will become a dominate and measurable advertising medium.

If Cable sits out the opportunity to own a leadership role in this new format of advertising, there won't be room for them at the table down the road. That's because the viewer and the entertainment companies will be enabled and have a financial incentive to circumvent cable operators.

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