

Google TV is going to be very interesting. It is far from a certainty that it will be more than Apple TV in terms of consumer sales. From a first glance the Marketplace is the most important and interesting element of the announcement. As a development platform, Android creates the potential for untold unique and interesting applications that could capture users imagination. Early on, I don't think TV oriented apps will have the most impact. If I understood the announcement, in the beginning of 2011, there will be an Android Marketplace. The money and the opportunity won't be in TV apps. It will be in gaming and social apps. The low hanging fruit will be in taking apps that work on facebook and Iphone/Pad and moving them (if they haven't already) to the Android platform and upsizing them to take advantage of working on a big screen.

The Google TV box could be a very cool and hopefully inexpensive gaming console. That is where the money will be.

What about TV ?

The success of Google TV will come down to one thing....PageRank. Can you imagine the white hat and black hat SEO battles that will take place as video content providers try to get to the top of the TV Search Listings on Google TV ? Like Google said, there are 4 billion TVs and growing and the US TV Ad market is \$70 BILLION. There is a lot at stake if Google TV takes off. How Google does its PageRank for this product will have a bigger impact on the success of the product in the TV market than anything else it does.

If you search for "House" on your Google TV and it returns a Youtube Video of some kid doing a parody of the Fox tv show House, you can bet the shit is going to hit the fan. Not that Fox or any big media company will sue Google. I don't think they will. What will happen is that they will "turn off" the Google TV Chrome Browser, just as they did to Boxee. They will fight and possibly sue over what meta data is used to determine search results. It will be a mess. That would kill the product because if it doesn't work with the TV shows you want to watch, why buy it ?

On the flipside if the best Google offers users is what they showed in today's demo, returning 5 or fewer results from a search with content from the cable/sat provider showing first and possibly consuming all 5 results, every internet content creator is going to scream loud and long at Google for putting them at a disadvantage. No one is going to be able to find your video if you show traditional TV shows first and don't show more than 5 results. They aren't going to be satisfied with referrals or Google Suggestions as their only access to Google TV users. They are going to claim that this is all just a ruse to get them to advertise and that Google sold out to big media.

Even if Google lets the user decide how to rank results, it creates too much risk for TV content providers and their distributors. More mess.

On the other other side, if traditional TV makes it to the top, Google TV is the best thing to ever happen to Cable , Satellite and Telco TV providers. Why ? Google just solved their biggest problems, their user interface and programming guide. Not only that, if Google TV is what big content providers and distributors consider to be a good partner, they just off loaded much of the future R&D for the set top box to Google and its partners and developers. Should cable and companies adopt Android on their set top boxes ? They will watch and decide. Even better for the TV Providers, maximum utility from the Google TV comes from having a TV subscription. They may actually gain subscribers as a result of this product. Which is exactly why Charlie Ergen had Dish Network participate. Its win win win for Dish Network

Google TV isn't the answer. It's the question. I'm sure Apple, Microsoft and even Facebook have an opinion on the announcement. Their response will be even more interesting.

The Future of TV is..... TV. But Google sure sped up the timeline today.