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WHITE PAPER

# Social Entertainment 2.0: What Is It, and Why Is It Important?

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## IDC OPINION

Social entertainment is the blending of entertainment content with social media functionality such as forums, reviews, ratings, and sharing and location options. It is the foundation for a more enriching and engaging content consumption experience. Today, aspects of social entertainment are found across a wide range of Web sites featuring an assortment of content types. Social entertainment is distinct from social networking in that the former is based fundamentally on interaction with content, while the latter is based primarily on building relationships with other users.

In this White Paper, IDC notes the following:

- IDC research has shown that social media enhances user engagement with content sites. While the majority of U.S. Internet users use social networking sites — including the vast majority of the under-24 and under-34 Gen Y segments — the impact of social functionality on entertainment content Web sites is no less important. Survey data shows that Gen Y users leverage social functionality in part as a means to discover, share, and comment on content. Over three-quarters of respondents in a recent survey reported that social features are at least moderately important to their experiences using entertainment Web sites, with a quarter rating them highly important.

- Today's social entertainment experiences often exist in silos that require consumers to bookmark or navigate to many different sites to access content across genres or media types. IDC believes that breaking down these silos and enabling users to seamlessly access content via a single site is a much-needed next step for social entertainment experiences. This evolution toward social entertainment 2.0 will be dependent on the development of comprehensive content aggregation solutions that can bridge the gap between all of the existing silos and function as gateways to content across the Web.

- Within the range of social entertainment–oriented sites, very few can be considered true gateways. And yet, nearly 40% of survey respondents reported a high level of interest in a free gateway to entertainment content. Therefore, with the development of social entertainment 2.0, companies have the opportunity to address the challenges of providing users with access to content across a multitude of sites via automated aggregation and under the guidance of enthusiasts and tastemakers within a social environment.

# METHODOLOGY

This White Paper draws upon IDC's ongoing research into online consumer behavior and the digital marketplace and interviews with stakeholders in the digital marketplace value chain, including publishers, advertisers, and ad networks. IDC also regularly conducts consumer surveys in the United States and globally to increase the industry's understanding of consumer behavior.

# IN THIS WHITE PAPER

This IDC White Paper is an introduction to the growing and changing social entertainment market. It addresses the ongoing evolution of social entertainment, explains the distinction between social entertainment and social networking, and outlines why the market is ready to make the transition to social entertainment 2.0. The document highlights key players in social entertainment with a focus on the opportunities and challenges associated with the development of sites aimed at content aggregation within a social environment.

# SITUATION OVERVIEW

## Introduction to Social Entertainment

### *What Is Social Entertainment?*

Social entertainment is the blending of entertainment content with social media functionality such as forums, reviews, ratings, and sharing and location options. The blending of entertainment and social experiences is not new, and most sites offering entertainment content incorporate various social experiences to increase user engagement with a particular site, piece of content, brand, or other entity. A key feature of social entertainment is conversation between users. This, in addition to the posting of new content as it becomes available, creates a real-time experience that is fundamental to a dynamic online social environment. Social entertainment, therefore, is less about the traditional notion of discrete Web pages, tracked by page views, and is best thought of as the stringing together of content, comments, and other interactive elements into a real-time stream experience. Value is created for users when desired content, along with related content, is accessible at a quick glance.

Today, social entertainment is typified by individual sites dedicated to a particular type of entertainment experience incorporating social elements. The evolution of online entertainment experiences is ongoing, and these sites span a wide variety of content types and genres and a diverse array of social experiences. YouTube, for example, features ratings and comments and allows users to share content on other sites. Entertainment news sites featuring text, video, and pictures — such as TMZ, Yahoo! Sports, and Film.com — also allow comments among other social elements, including sharing via email and popular social networks.

To date, the first generation of social entertainment sites — social entertainment 1.0 — has been notable for being siloed by content type or genre. Typically, consumers can find content-rich and social-rich experiences across a wide range of sites, each dedicated to a particular form of entertainment. Many entertainment sites exist as endpoints or final destinations for consumers looking for content. In some instances, these sites link to outside destinations. But this function has been more tangential and the specialty of blogs or gossip-style Web sites rather than a central feature of leading commercial content sites.

A hallmark of social entertainment is that it is accessible across connected device platforms. In fact, the spontaneity that's inherently part of the experience of using the mobile Web on devices such as smartphones and media tablets fuels a more immediate and dynamic conversation on social entertainment sites than would be possible through the traditional, fixed, PC-centric Web alone. Social entertainment providers that prioritize development of mobile applications for a range of OS platforms (iOS and Android in particular) and display sizes will be best equipped to meet user expectations of anywhere, anytime access and to exceed expectations of a deep, rich content experience that keeps an audience coming back for more.

### *Why Is Social Entertainment Important?*

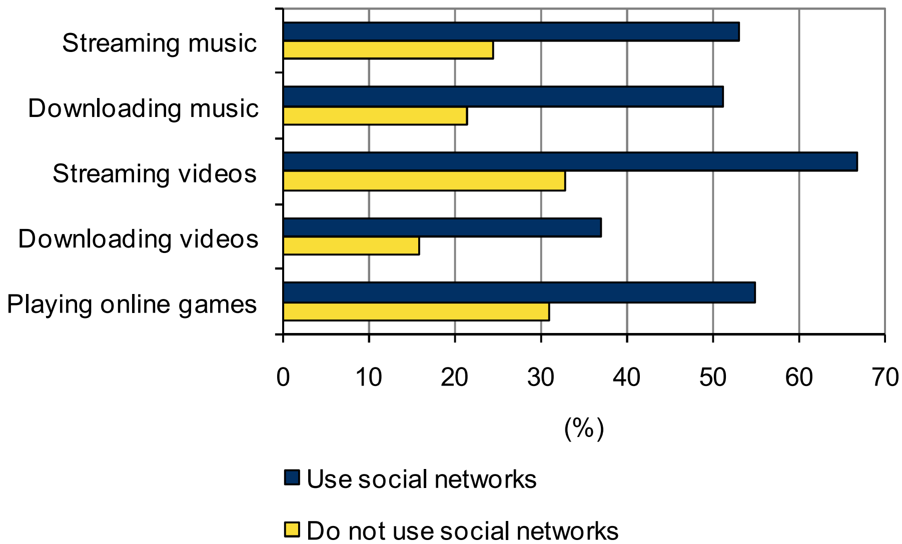
IDC research has found that social elements are integral parts of a successful online entertainment experience. Unlike lean-back experiences characteristic of living room television viewing, online experiences are commonly interactive. Social elements enrich online experiences and add value to entertainment sites, which increases the number of unique visitors, and thereby audience reach, and drives deeper engagement by individual users and more traffic overall.

In previous IDC research, we compared traffic between entertainment sites that had social networking functionality and those that had no functionality or limited functionality. We estimated that for sites with social networking functionality, on average the number of unique visitors per month was higher by about 20%, the number of visits per unique user per month was higher by about 50%, and the number of page views per user per month was higher by about 100%.

However, social networking functionality increases not only page views but also user engagement with the content itself. This is because users who do use social media are heavy entertainment users. Figures 1 and 2 show the share of U.S. and worldwide users who engage in certain online entertainment activities, comparing those who use social networking Web sites and those who do not.

## FIGURE 1

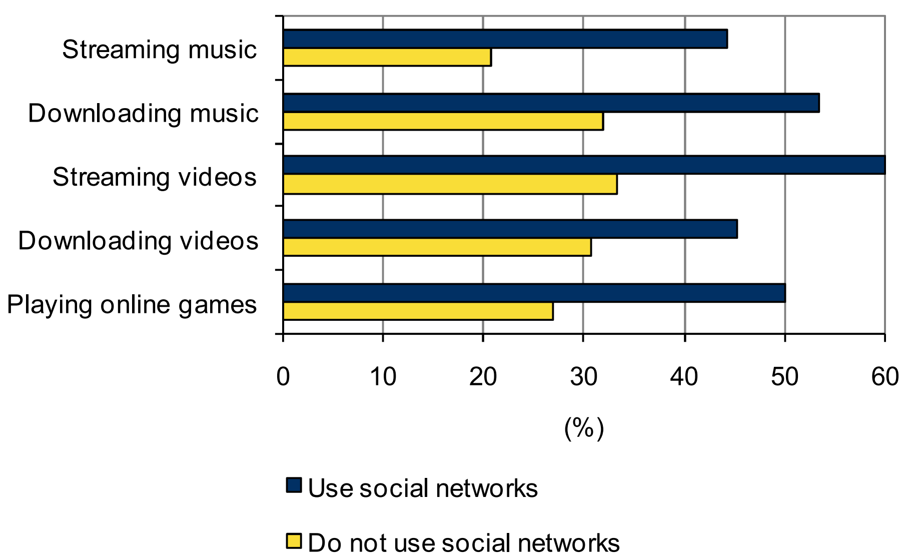
Share of U.S. Users Engaging in Entertainment Activity by Social Networking Usage




Source: IDC's *New Media Market Model Survey*, 2011

## FIGURE 2

Estimated Share of Worldwide Users Engaging in Entertainment Activity by Social Networking Usage




Note: Estimate is based on survey data from the United States, the United Kingdom, France, Germany, Russia, Japan, China, South Korea, and Brazil.

Source: IDC's *New Media Market Model Survey*, 2011

Deeper consumer engagement, coupled with greater traffic attracted to robust experiences, creates value. More expansive entertainment experiences create increased advertising inventory, and deeper user engagement in turn increases the value of that inventory. Other associated benefits include ecommerce opportunities, affiliate relationships with etailers or other content sites, and even promotional and sponsorship opportunities that can be sold to brand advertisers.

### *How Is Social Entertainment Different from Social Networking?*

In social entertainment, content is tightly intertwined with social features, and interactions around the content create a highly personalized experience for users. This in turn drives a virtuous cycle of ongoing consumer engagement for service providers. In this sense, social entertainment refines the paradigm established by social networks, in which interactions with others are central and reasons for interacting with them, including content interest, are secondary. The value of social entertainment sites for users is that the combination of content and conversation enables them to engage more deeply with topics of interest than would otherwise be possible through traditional entertainment sources or social networks.

The growth of social networking has been one of the great stories of the Web and indeed has underpinned the evolution of "Web 2.0." The growth of social networks and social functionality more broadly has fundamentally transformed the experience of using the Internet into a more personally useful and intimate one. Consumers find hours of enjoyment sharing thoughts, pictures, and videos in the context of building out a network of friends. At the root of the experience is the connection to other users, with content being a vehicle for connection building. In social entertainment, connections are made well beyond the traditional social networking foundation of friends and family who make up a user's immediate network. Instead, social entertainment connects users to tastemakers, influencers, and enthusiasts who all contribute to the personalized content stream.

### *Social Entertainment 2.0*

The evolution of social entertainment, therefore, is about making the Internet more personal, useful, and relevant, and it does not demand the replacement of key sites that consumers continue to enjoy. Moreover, the evolution should work within the context of existing leading sites and user behavior so that there's an active integration with current user demands.

Social entertainment itself is in a state of flux and improvement, and IDC believes that we've arrived at a transition point from version 1.0 to version 2.0. With that designation, social entertainment 2.0 is poised to change the way in which users access and engage with content across a multitude of sites and genres by offering a higher level of personalization and aggregation from multiple Web sites in single destination social entertainment gateways.

IDC believes that a market opportunity exists for sites to more fully blend entertainment content and social media experiences. Social entertainment 2.0 is focused on improving the consumer experience by aggregating the vast amount of entertainment content found on the Web and providing users a seamless way to find, interact with, and share content. Social entertainment 2.0 breaks down the silos that exist between content types and genres and individual sites. At the same time, the social experience transcends any given specific site. Consumers should have the ability to easily discover new content, interact with it, and share it across their favorite social networking environments without being limited to a specific URL for discovery, and at the same time, they should be able to engage with other consumers interested in the same content.

Content discovery across an essentially limitless range of Web-based sources should allow for personalized experiences in which users can specify subjects or topics of interest. In social entertainment 2.0, content can be more easily found and shared, providing a more enriching experience for individual users. Moreover, the content itself — or at least links to it — can migrate virally to new users, thereby expanding the site's reach and value. But at the core, users should be able to access content that is organized based on a specified topic.

For example, let's say a user is a fan of a particular television show. The user can go to the programmer's Web site to access streaming episodes as well as an assortment of other content directly related to the show. However, what about news reports about the show, or user-created content such as episode reviews, or links to other content unrelated to the programmer's site that features the show's stars? Content outside the scope of the programmer's direct involvement may not be found within the show's official online environment.

In this scenario, the user could set up news alerts at other sites for stories about the show and its stars. The user could also scour the Web, including leading entertainment news and gossip sites. However, this means an investment of time and work on the user's part to "cover all the bases" to ensure related content is not missed. This scenario applies across movies, television shows, musical artists, and celebrities. Yet it is highly inefficient and outdated given the Internet's scope, dynamism, and potential for interconnectivity. Each of these shows, movies, artists, or other entities is a topic that a user should be able to follow in a seamless manner through a single robust social gateway.

As much as social entertainment drives engagement at individual sites, the broader user experience is not ideal. Social entertainment 2.0 heralds the emergence of sites that act as aggregators and gateways to all things related to a user's favorite entertainment topics. This does not require that all content can be found within a single site so much as it requires that all content can be accessed and shared through a single site. Content aggregation further promotes increased social activity when social entertainment 2.0 sites utilize tastemakers or curators with whom users can interact. Moreover, these sites, by providing deep content experiences, can serve as gathering places and preferred destinations for users eager to connect and share with other enthusiasts.

### *Consumer Demand for Social Entertainment*

Interest in Web sites that offer social entertainment features is borne out in recent U.S. consumer research. In April, we conducted an online survey in the United States among 1,010 respondents aged 18 to 34. We targeted this group because those in it tend to be both highly connected to the Internet and apt to seek out current entertainment and celebrity news. These survey respondents reported spending

3 hours and 13 minutes on average per day on the Internet, across all devices owned, which included desktop and laptop PCs, netbooks, media tablets, mobile phones, and connected portable media players. Of that time spent online, 1 hour 32 minutes on average is spent on entertainment or entertainment-related Web sites, or approximately 48% of total time spent online.

The top 5 regularly visited Web sites for entertainment content across all devices owned during the past month were Facebook (74%), YouTube (71%), Google (68%), Yahoo! (47%), and Hulu.com (31%). The top 5 regularly visited on mobile phones were similar: Facebook (63%), Google (45%), YouTube (39%), Yahoo! (25%), and Twitter (17%).

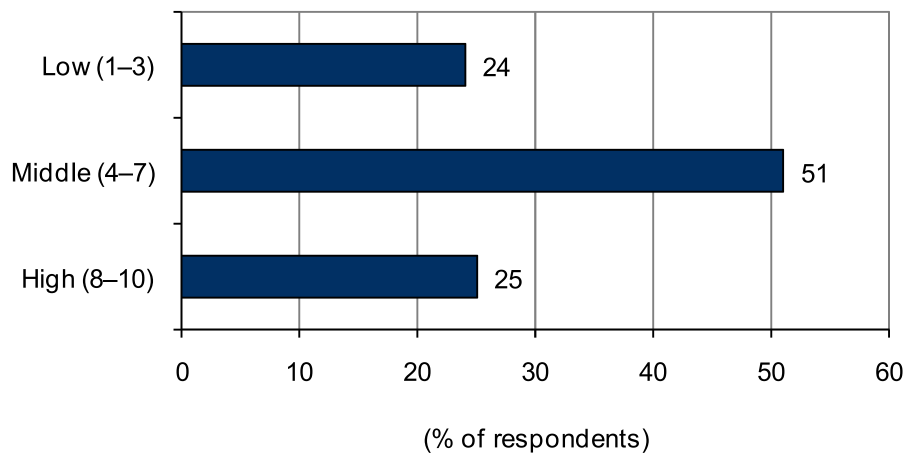
A total of 76% of all respondents reported that social features are at least moderately important to their experience of using entertainment Web sites. As shown in Figure 3, we asked respondents to rate the importance of social features on an entertainment Web site on a scale of 1 to 10, where 1 is not at all important and 10 is extremely important. One quarter — 25% — rated them highly important (8–10). This speaks to how social features have gained traction among this group as a whole and are recognized as being fundamental to the experience of using an entertainment Web site. Approximately half — 51% — rated social features moderately important (4–7). We believe this group is open to further evangelization of social features and represents a key target market for driving interest in and usage of social entertainment. By contrast, just less than one-quarter (24%) reported a low level of interest in social features.

We see some variation by age in that 22- to 25-year-olds and 26- to 34-year-olds are more likely to rate social features very highly compared with 18- to 21-year-olds. In our survey, 29% of 22- to 25-year-olds and 30% of 26- to 34-year-olds rated social features highly important (8–10) compared with just 21% of 18- to 21-year-olds. But a high percentage — 58% — of 18- to 21-year-olds rated social features moderately important, so that combined, a total of 79% rated social features at least moderately important. This is slightly higher than 75% and 76%, respectively, for 22- to 25-year-olds and 26- to 34-year-olds. Individuals in the younger segment may be so accustomed to social features online that they simply expect them, whereas for older age groups, these features are more of a standout novelty.

## FIGURE 3

Importance of Social Entertainment Features in Entertainment Sites

Q. *In general, how important is it to you for an entertainment site to include features that allow you to comment on, rate, and share content and other information with other people or view the comments of other users? Please rate on a scale of 1 to 10, where 1 is not at all important and 10 is extremely important.*




Source: IDC's *Social Entertainment Survey*, April 2011

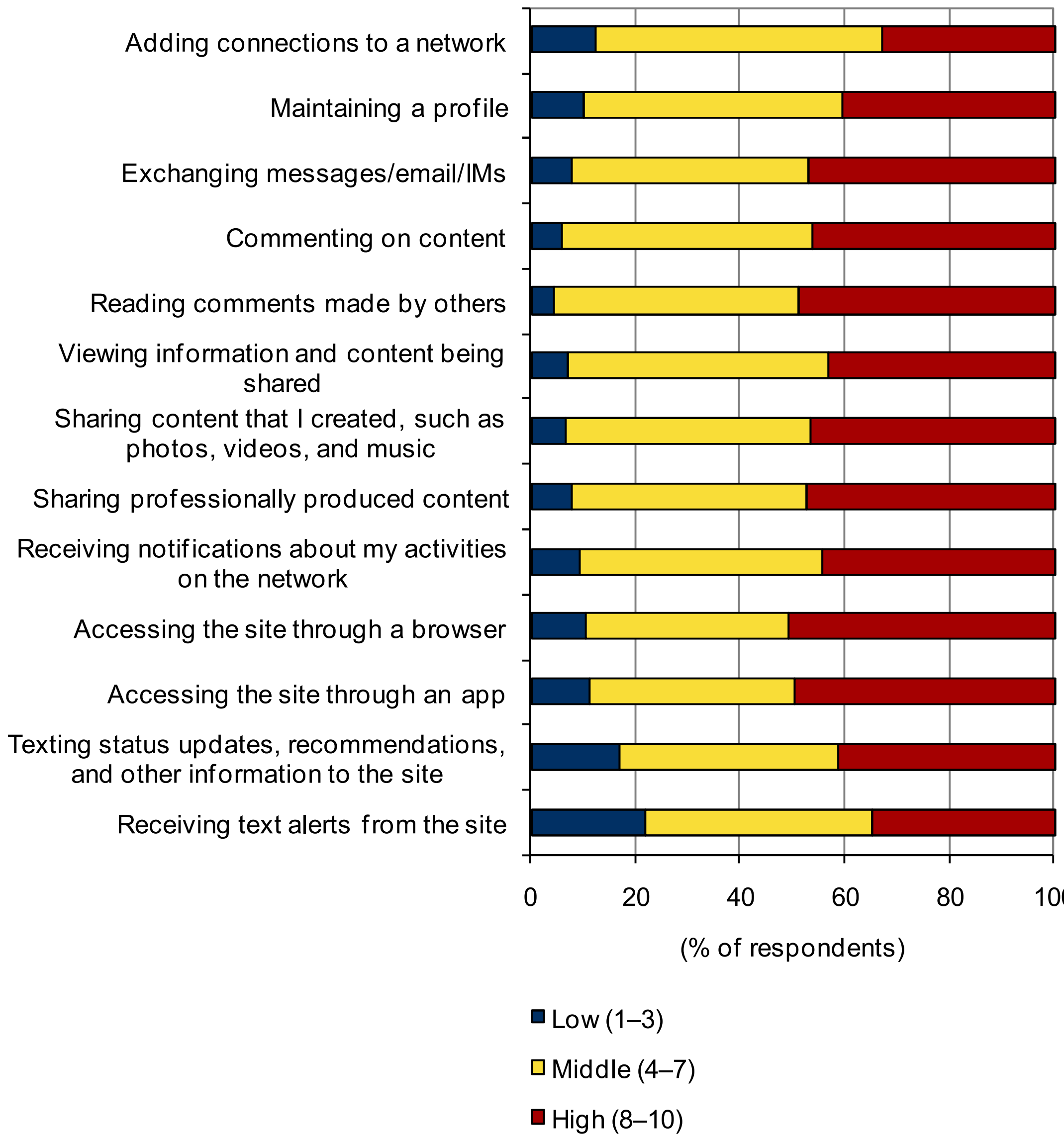
Those who answered 5–10 on the scale in Figure 3 (i.e., those for whom social features in entertainment sites are relatively important) were asked to rate the importance of specific social features, as shown in Figure 4. Sharing information in the context of a social entertainment site is very important. Nearly half — 49% — gave "reading comments made by others" a high rating (8–10), while 47% reported the same for "exchanging messages/email/IMs." "Commenting on content" received a high rating from 46% of respondents. Sharing content is also very important, with 48% and 47%, respectively, identifying "sharing professionally produced content" and "sharing content that I created, such as photos, videos, and music" as highly important. All of these features are central to a social entertainment site's value proposition of amalgamating compelling content and enabling users to interact with it and with others who have similar interests.

There was little variation across age brackets in the responses to these questions. However, 22- to 25-year-olds rated "commenting on content" (51%) and "reading comments made by others" (53%) slightly higher than total respondents. Also, it's interesting to note that men (36%) were more likely than women (30%) to rate "adding connections to a network" very highly.

## FIGURE 4

Importance of Specific Social Entertainment Features in Entertainment Sites

*Q. Please rate the importance to you of the following specific features and functions of Web sites you use for entertainment content and information, using a scale of 1 to 10, where 1 is not at all important and 10 is extremely important.*




Source: IDC's *Social Entertainment Survey*, April 2011

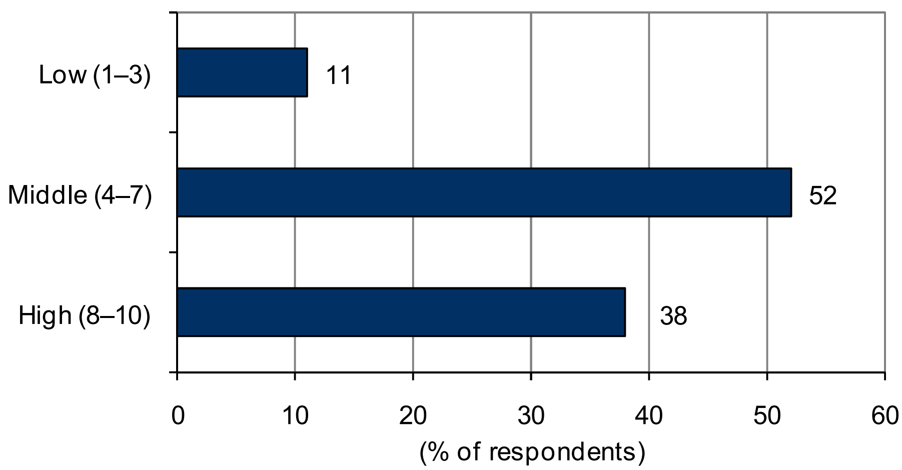
The same respondents were asked about their reasons for using entertainment sites with social features. The top reasons reported were primarily content focused: 60% reported using those sites to find content; 46% to discover content through people with similar interests; and 45% to comment on content.

As shown in Figure 5, 90% of all respondents reported a moderate or greater interest in a single free Web site for entertainment news and content "on which you could specify your interests and that site would provide relevant content and links for your interests." We believe this finding validates the current shift toward social entertainment sites and features, as nearly 40% of respondents reported having a high level of interest (8–10) compared with more than half of respondents who indicated a moderate level of interest (4–7). A little more than 10% reported a low level of interest (1–3). Females aged 26 to 34 were more likely to rate these sites highly, with 96% reporting moderate or higher interest in a single free Web site for content.

**FIGURE 5**

Interest in Single Free Web Site for Content

Q. *For entertainment news and content including stories, videos, photos, and music, how interested would you be in using a single free Web site on which you could specify your interests and that site would provide relevant content and links for your interests? Please indicate how interested you would be on a scale of 1 to 10, where 1 is not at all interested and 10 is extremely interested.*




Source: IDC's *Social Entertainment Survey*, April 2011

These survey results indicate strong consumer support for the integration of social features in entertainment sites. They also indicate a high level of interest — among nearly 40% of respondents — in a single free "gateway" destination for entertainment content and information. The stage is clearly set for ongoing evolution from social entertainment 1.0 to 2.0; however, competition and a comprehensive selection of providers to meet that need are lacking.

### *Sizing the Social Entertainment Market Opportunity*

Social entertainment represents a huge market opportunity. Leading entertainment Web sites are hit by tens of millions of unique users each month in the United States alone. YouTube gets as many as 140 million unique users each month in the United States, representing nearly two-thirds of all online individuals. Unique hits to sites provided by large entertainment conglomerates including Turner, Viacom, and

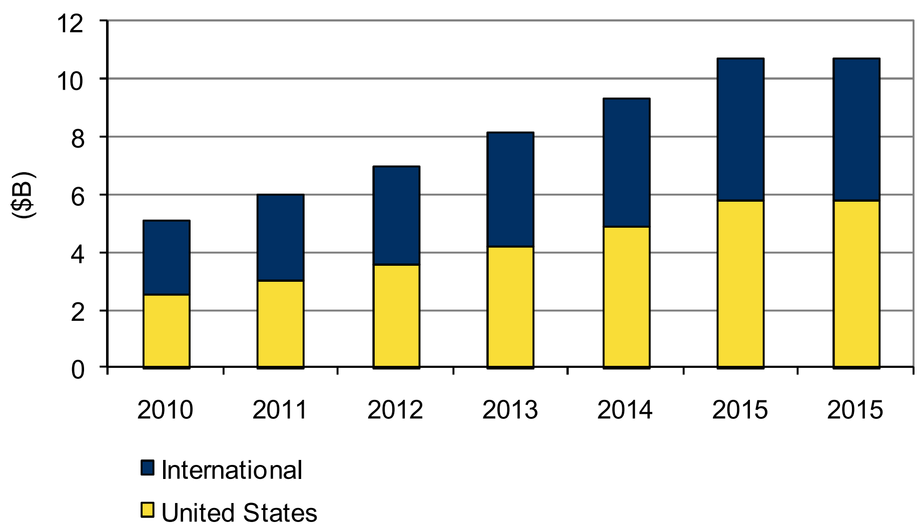
CBS number close to 100 million each. When we add up the top dozen or so U.S. online entertainment providers, we find that there are over 700 million monthly users.

This means that the vast majority of online users already engage with entertainment content as part of their current browsing behaviors. While those 700 million monthly users are not 700 million actual individuals, the point is that many users are regularly going to many sites to access content. Globally, that number of users increases to well over a billion. Connecting these consumers with more of the content they already want in personalized and efficient ways is what the future of content gateways is all about.

This tremendous consumer interest in entertainment or information about it delivered online directly translates into business opportunities. IDC estimates that the total addressable market (TAM) for advertising on entertainment Web sites in the United States alone will grow from $2.5 billion in 2010 to $5.8 billion in 2015, a CAGR of 18%. Internationally, spending will grow from $2.5 billion in 2010 to $4.9 billion in 2015, a CAGR of 14.3%. In other words, over the course of our forecast period, the TAM will double in size (see Figure 6). This potential is primarily based on advertising for premium entertainment offers; however, entertainment sites are also well suited to tap into other advertising categories such as travel, computing, electronics, automotive, and telecommunications, which IDC estimates contribute about one-third of the overall TAM for entertainment sites.

**FIGURE 6**

Estimated TAM for Online Advertising on Social Entertainment Web Sites, 2010–2015




Source: IDC's New Media Market Model, February 2011

Advertising agencies that serve brand advertisers well understand that social entertainment services offer important advantages over experiences that are not socially enabled:

- The core target demographic of entertainment sites, younger users in the 13 to 34 age group, embraces social media most ardently among all user groups; in fact, these individuals expect social features to be present as a default. Social entertainment sites serve that need.
- Most entertainment is an inherently social experience. Offerings enabling community and therefore sharing will also attract more users than those that do not.
- As we have shown in Figures 1 and 2, social media users are also more engaged users; they visit socially enabled sites more often, spend more time on them, and consume more content.
- The "virality" of social entertainment services also is attractive to advertisers because it offers advertisers the opportunity to spread their message beyond just flat advertising and to engage with consumers in a more meaningful dialogue.

All of these advantages mean that social entertainment sites have a greater potential audience reach than sites that are not socially enabled and have more inventory to sell to reach users who are more engaged with the content and, therefore, with the advertising. This translates into above-average ad sales opportunities for social entertainment offerings.

## Competitive Landscape

The ecosystem of sites engaged in delivering social entertainment experiences is vast and varied. Some are focused on single genres or content types, while others are more comprehensive. Some are focused more on pushing their own content to consumers with social being a less significant aspect, while others are much more geared toward allowing for interaction with content. Players in the space range from single genre–focused news and multimedia sites such as TMZ and Perez Hilton to comprehensive sites such as Yahoo! and MSN. The market also includes leading content sites such as YouTube, VEVO, Break.com, and Hulu in addition to social networking and microblogging sites such as Facebook, Twitter, and Tumblr.

Survey data shows that consumers access an incredibly broad selection of Web sites for entertainment content, yet only a handful — such as Facebook, YouTube, Google, and Yahoo! — can be considered dominant. When mobile is added to the mix, other sites rise to prominence as well, including Twitter, Buzznet, Flixster, and Tumblr. Of these leading social entertainment or social networking sites on the Web, few, if any, are focused on enabling social entertainment 2.0 experiences. This is understandable because many sites are squarely focused on improving and better monetizing existing experiences. Take for example some of the leading sites:

- **YouTube.** YouTube is by no means a static environment, and new content types, design elements, and business models are all in the mix. However, YouTube is fundamentally focused on video — both user created and professionally produced. Ongoing evolution of the site is based on driving more content and traffic to the YouTube environment with more effective monetization.

- **Facebook.** In the United States, along with other parts of the world, Facebook reigns as a dominant force in social networking. Individuals, groups, brands, and companies use Facebook to connect with users. Content on Facebook, however, consists to a large degree of that which is posted by users. Therefore, the focus is not on content discovery as much as content sharing.
- **Twitter.** Similar in some respects to Facebook, Twitter is focused on sharing content, links, and thoughts between users. Probably most important for the company today is to optimize the revenue-generating potential of millions of users and tremendous traffic.
- **GetGlue.** An example of one of the smaller sites on the Web with a social entertainment framework, GetGlue connects users to content and other users based on preferences. The site, which is particularly successful within the mobile Web environment, also encourages its users to "check in" when consuming content and offers rewards when check-ins are made for partner content. This is definitely an example of emerging social entertainment experiences, but it is tailored to driving interaction around the content being consumed rather than serving as a vast content discovery vehicle.

Each of these sites has a specific focus with no declared intent to expand significantly beyond that focus. To a large degree, that makes sense, because each is competing for or aiming to maintain a leadership position in a particular segment of social entertainment. Moreover, each represents an essential facet of compelling social entertainment experiences that need not disappear as the market develops.

Missing, however, are gateways that provide a social framework for comprehensive and efficient access to and sharing of entertainment content across a multitude of sites. Such a concerted effort around automated and trendsetter-based content aggregation can distinguish a site from its peers across the broader social entertainment spectrum.

There are a number of approaches a site can employ to enable social entertainment 2.0 experiences. Automated aggregation of content is a necessary element to contend with the vast amount of content available across the Web at scores of different sites. Aggregation by established Web personalities who are trendsetters allows for a human touch to identify key stories or new angles that would simply be lost within the volume of content synthesized during an automated aggregation process. Today, many sites are run by personalities or trendsetters who, by posting content, dictate what is worth paying attention to. However, these sites often are tailored around a narrow topic or are so broad in scope that they are inclusive of virtually any hot topic of the moment across all of the entertainment industry. Sites that allow for the personalization of topic choices with automated and trendsetter aggregation — coupled with user interaction — are the exception in the market, with Myspace being a leading example of this approach. Moreover, sites such as Myspace attract artists, musicians, actors, and other talent to proactively participate in the evolution of the social entertainment Web environment.

This works hand in hand with existing social entertainment sites. Sharing can take place not just within a given site between registered users but also across other leading sharing and networking sites, including Facebook and Twitter. Such a scenario would address the inefficiencies of decentralization and fragmentation within existing social entertainment 1.0 experiences and create a central destination for access to and conversations about content.

# FUTURE OUTLOOK

IDC believes that market opportunities exist for Web properties to manage the evolution of social entertainment 2.0. The Web has already witnessed the rapid proliferation of commercial content sites to balance vast libraries of user-generated content. In similar fashion, the aggregation of entertainment content needs to move beyond user-created lists of links that are inherently limited in scope and scale.

The emergence of the next generation of entertainment asset aggregation does not undermine the existence of individual sites specializing in news, video, music, and other forms of entertainment-related content any more than the interactive program guide undermined individual channels in pay TV offerings. To the contrary, the two work hand in hand to help make sense of the vast quantity of content available to consumers. Personalization, however, is the next great frontier, as we're in the midst of transitions from linear television to on-demand consumption. So too should personally tailored entertainment content experiences be enabled on the Web so that consumers can be efficiently led to content across numerous types, genres, and sites based on customized preferences.

The fulfillment of social entertainment 2.0, therefore, is the blending of existing content sites with robust personalized aggregation based on individual interests all intertwined with the ways in which consumers wish to share content of all types with friends and beyond.

# CHALLENGES/OPPORTUNITIES

IDC believes that key opportunities and challenges exist with respect to the future of social entertainment. For robust content aggregation within a social environment specifically, these opportunities and challenges are intertwined:

- **Targeting users and establishing brand identity.** The Internet is fluid and new sites are constantly emerging. Yet, to rise to the top, successful sites almost always begin with a focused approach. An approach that is too broad often leads to ineffective execution and a failure to be the right solution for any population of users. Even Facebook, a dominant social networking player, began to serve the mass market only after years of targeting a specific population of students. Segmenting users and identifying a defined group to address is a necessary early step toward establishing a value proposition and a brand identity that can resonate with a target population.

- **Curated content aggregation and attracting and retaining curators.** Engaging content mavens to aggregate and manage online experiences is a creative way to blend content with social media. Creating buzz, providing recommendations, and drawing connections between pieces of content are all important parts of a curator's job. Curators also help filter out noise and function as trendsetters and trend evangelists for users in a way that automated processes simply cannot. However, what's the incentive for these curators? YouTube, a site predicated to a large degree on voluntary video sharing, incents its top content creators with revenue sharing. A social entertainment site that is looking to build audiences of users on the backs of trendsetters must plan to incent those trendsetters to stay active.

- **Automated content aggregation and perfecting the technology.** Content aggregation cannot simply be a function of human activity. Therefore, the reliance on automated processes to bring together content from across the Web is a requirement. The key, however, will be for these processes to inspire confidence among the user base that all important assets are being aggregated much in the way that consumers believe that a good search engine is not missing anything. The marketing potential alone of such technology could be tremendous. However, if the technology fails to deliver, it undermines the entire experience.

- **Community recommendations and building an active user base.** A key facet of social entertainment, of course, is the contribution made not just by curators but by users themselves. This aspect of the social entertainment experience depends on active and relevant participation among users. An environment in which participation is limited on the one hand or allowed to run amok on the other undermines the value of the experience and alienates users. While a curated environment may filter out less relevant or lower-quality content, the need for filtering and quality control within vibrant and active user interactions will be essential.

## CONCLUSION

The temptation to pick winners or identify fundamental and permanent shifts is understandable. People want to make sense of the world around them, and identifying trends and hopping aboard a bandwagon is nothing new. Yet perhaps too much is being made about the so-called maturation of social media or other contexts on the Web. The rise of Facebook signals neither the end of competition nor the last word in social networking. The notion of real-time updates perhaps best illustrated by Twitter does not signal the end of longer-form content creation in spite of reports that blogging has been superseded. The rise of applications, similarly, does not signal the end of the open Web. All of these entities coexist and will continue to do so, with consumers choosing their favorites based on personal preference and lifestyle. The online experience, like any other experience, goes through stages, and perhaps most importantly, its evolution does not cease.

For social entertainment, however, the time has come for next steps. Consumers, as demonstrated by recent survey data, look for social features on entertainment Web sites. They use those features not only to share and comment on content but also to learn what others have to say and hope that they will be led to additional content. While a handful of sites are used by many, a wide variety of sites provide consumers with entertainment content across a range of topics and interests. Of those leading sites, however, none are focused on enabling consumers to better access the content they want in an automatic process augmented by tastemakers tasked with fulfilling consumer demand for content discovery via social interaction.

The evolution of social entertainment will not displace the vast number of sites devoted to providing users with high-quality, content-rich experiences. However, enabling easier access to content across all of these sites would be an understandably valuable contribution to the social entertainment ecosystem based on survey data that shows that nearly 40% of Gen Y respondents are highly interested in such sites and slightly more than 50% are moderately interested. No one site should replace all of the diverse options available to consumers via the Web and within the social entertainment context, and there is room for multiple social entertainment implementations ranging from microblogging to user loyalty and rewards programs. At the same time, the market is ready for robust content gateways to move social entertainment beyond search and browsing to personalized content discovery.