Gartner

Press Release

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Gartner 2013 Hype Cycle for Social Software Reveals a Wealth of Emerging Innovations

The Future for Social Collaboration to Be Explored at Gartner Portals, Content and Collaboration Summit 2013, 16-17 September in London
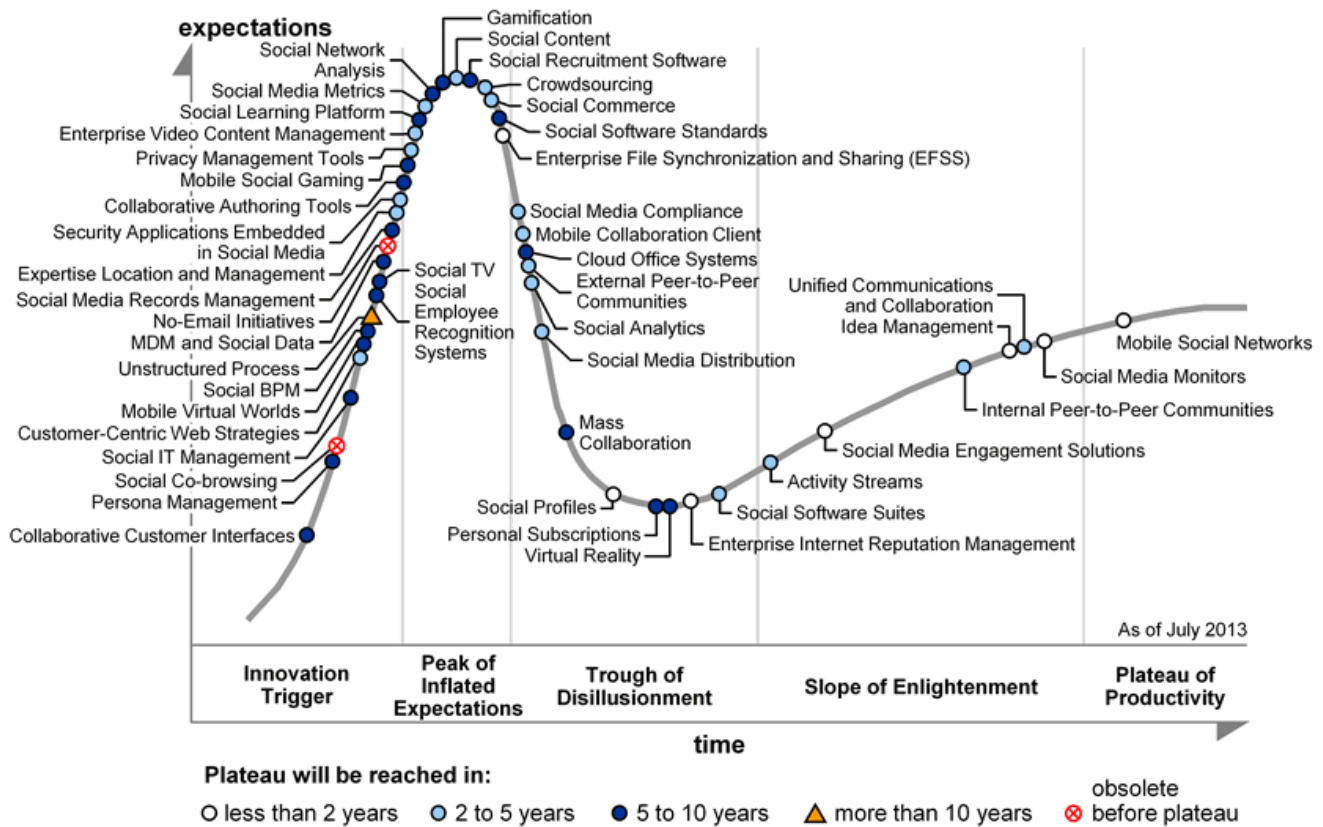
Egham, UK, 28 August 2013 — Gartner, Inc. said collaborative customer interfaces, social co-browsing, mobile virtual worlds and social TV are just a few of the innovations on the rise in its 2013 Hype Cycle for Social Software. The adoption and use of social technologies, techniques and capabilities have increased to meet business demands. Their progress goes hand in hand with growing business expectations for their use.

"IT leaders must keep abreast of this evolving sector in order to take advantage of social capabilities and understand the implications that social software developments have for related technologies," said Jeffrey Mann, research vice president at Gartner. "As social technologies mature and organisations improve their understanding of how to apply them, they will be found in more and more situations. Increasingly, social technologies are not implemented on a stand-alone basis, but are tightly integrated within a variety of other technologies, including business, IT operations, unified communications and collaboration applications."

Vendors are increasingly adopting a "wrap-around" approach, in which social capabilities are not things one buys in themselves, but are included as part of something else. This trend is particularly prevalent with HR management, customer relationship management and other business application vendors.

"Given the rapid advance of social software in terms of adoption and sophistication, CIOs and other IT leaders in all organisations — irrespective of size, industry and region — should frequently review their assumptions, strategies and competitive positioning," said Mr Mann. "For most categories of enterprise software, behavioural changes are required to achieve successful outcomes. Be purposeful in pursuing social initiatives, and prepare to evolve your strategy continuously."

Figure 1. Hype Cycle for Social Software, 2013

expectations

- Social Network Analysis
- Social Media Metrics
- Social Learning Platform
- Enterprise Video Content Management
- Privacy Management Tools
- Mobile Social Gaming
- Collaborative Authoring Tools
- Security Applications Embedded in Social Media
- Expertise Location and Management
- Social Media Records Management
- No-Email Initiatives
- MDM and Social Data
- Unstructured Process
- Social BPM
- Mobile Virtual Worlds
- Customer-Centric Web Strategies
- Social IT Management
- Social Co-browsing
- Persona Management
- Collaborative Customer Interfaces

- Gamification
- Social Content
- Social Recruitment Software
- Crowdsourcing
- Social Commerce
- Social Software Standards
- Enterprise File Synchronization and Sharing (EFSS)

- Social TV
- Social Employee Recognition Systems

- Social Media Compliance
- Mobile Collaboration Client
- Cloud Office Systems
- External Peer-to-Peer Communities
- Social Analytics
- Social Media Distribution

- Mass Collaboration

- Social Profiles
- Personal Subscriptions
- Virtual Reality

- Unified Communications and Collaboration
- Idea Management

- Mobile Social Networks
- Social Media Monitors
- Internal Peer-to-Peer Communities
- Social Media Engagement Solutions
- Activity Streams
- Social Software Suites
- Enterprise Internet Reputation Management

As of July 2013

| Innovation Trigger | Peak of Inflated Expectations | Trough of Disillusionment | Slope of Enlightenment | Plateau of Productivity |

time

Plateau will be reached in:
○ less than 2 years   ◔ 2 to 5 years   ● 5 to 10 years   △ more than 10 years   ⊗ obsolete before plateau

Source: Gartner (July 2013)

The social software market's landscape continues to evolve rapidly in response to hype, greater visibility and, more importantly, demand from organisations for advanced and secure solutions. As some technologies become well-understood and advance toward the Slope of Enlightenment, newer technologies are rising along the Hype Cycle at the Innovation Trigger. In 2013, these include:

Collaborative Customer Interfaces

A collaborative customer interface enables a customer service agent and a customer to share, simultaneously, the live version of the same business application. This requires the organisation to redesign the graphical user interface (GUI) and the underlying technologies to dynamically generate personalised interfaces. As a result, in industries such as financial services, travel and B2B customer support, businesses will be able to offer highly personalised customer experiences, as well as a feeling of participation by the customers in the resolution of their issues.

Social Co-browsing

Social co-browsing is the collaborative sharing of the same web space with one or more parties from a social network, regardless of the physical locations of the parties. Through social co-browsing, the parties can share a browser view and simultaneously browse a web site. By providing technologies for two or more customers to collaborate and share web space in a social co-browsing environment, organisations can turn happy and loyal customers into service and sales representatives. Social software and collaborative browsing are becoming more interlinked, and can successfully work together to enable customers to share web screen space with others.

Mobile Virtual Worlds

A mobile virtual world is a simulated environment where subscribers inhabit and interact via avatars running on mobile devices. It can be a mobile extension of a PC, a web-based virtual world or a pure

mobile service. Mobile virtual worlds are aimed at young users (tweens or teens), mostly to support gaming or social networking on mobile devices. However, these new mobile application paradigms might innovate traditional mobile application interfaces and significantly transform the interaction style and application designs during the next three years. Areas that might see benefits from adoption include marketing, advertising and customer service.

Social TV
Social TV describes communication and social interaction in the context of watching TV or content related to TV through broadband-connected TVs, or through the use of a companion screen, such as a media tablet. It can apply to community engagement with linear TV programming in real time or asynchronous social features added to or referencing on-demand content. Although broadcasters are unlikely to see much direct monetisation from social TV beyond viewer engagement and a new promotional channel for content, its indirect effects are more profound. Social features can reinforce synchronous viewing of linear programming and thus increase the value of live broadcast rights for certain content.

Social TV also represents an important competitive landscape among pure-play digital app and platform providers, device and TV manufacturers, TV programmers and their sponsors, and TV service providers. It is already disruptive in areas such as TV metrics and ratings, and nonlinear distribution. Social TV has effectively taken over the role once assigned to interactive TV as symbolising the future of the TV experience. Its broadest impact remains unpredictable, but we can be certain that innovators who discover the right way to bring social and TV experiences together for consumers will be richly rewarded.

More detailed analysis is available in the report "Hype Cycle for Social Software, 2013." The report is available on Gartner's web site at http://www.gartner.com/resId=2563715.

The effect of various social technologies on content and collaboration will be examined in more detail at the Gartner Portals, Content & Collaboration Summit 2013, taking place from 16 to 17 September in London. For more information about the Summit, please visit http://gartner.com/eu/pcc. To register for the Summit, members of the press can contact Rob van der Meulen on + 44 1784 26 7738 or at rob.vandermeulen@gartner.com. Information from the event will be shared on Twitter at http://twitter.com/Gartner_inc using #GartnerPCC.

About the Gartner Portals, Content and Collaboration Summit 2013
At the Gartner Portals, Content and Collaboration Summit 2013, Gartner analysts will help IT and business leaders get the most out of their investments in social, cloud and mobile technologies. Attendees will learn how social software, portals, and content and information management systems can drive innovation and collaboration.

About the Gartner Hype Cycle
Gartner Hype Cycles provide a graphic representation of the maturity and adoption of technologies and applications, and how they are potentially relevant to solving real business problems and exploiting new opportunities. Gartner Hype Cycle methodology gives a view of how a technology or application will evolve over time, providing a sound source of insight to manage its deployment within the context of your specific business goals. The Hype Cycle graphic has been used by Gartner since 1995 to highlight the common pattern of overenthusiasm, disillusionment and eventual realism that accompanies each new technology and innovation.

About Gartner
Gartner, Inc. (NYSE: IT) is the world's leading information technology research and advisory company. Gartner delivers the technology-related insight necessary for its clients to make the right decisions, every day. From CIOs and senior IT leaders in corporations and government agencies, to business leaders in high-tech and telecom enterprises and professional services firms, to technology investors, Gartner is a

valuable partner in more than 13,000 distinct organizations. Through the resources of Gartner Research, Gartner Executive Programs, Gartner Consulting and Gartner Events, Gartner works with every client to research, analyze and interpret the business of IT within the context of their individual role. Founded in 1979, Gartner is headquartered in Stamford, Connecticut, USA, and has 5,500 associates, including 1,402 research analysts and consultants, and clients in 85 countries. For more information, visit www.gartner.com.

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