

AUSTRALIAN COMMUNITY MANAGERS

CAREER SURVEY

2020

MAJOR PARTNER

 **higher logic**

SUPPORTERS

Quip

 discourse

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Major partner:
Higher Logic
Supporting partners:
Quiip and Discourse
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FOREWORD

Online communities are part of life for Australians - we gather digitally to work, learn, shop and play. We turn to online communities to deepen our knowledge about the world, to indulge our passions and to find support when times are tough.

The humans that keep those spaces running safely and smoothly are online community managers. They design for healthy and constructive social interaction and drive engagement around strategic goals or a shared purpose. They moderate and manage risk, and support the creation of content and activities that bind the community together. They work across industries and contexts - from entertainment to medicine.

This is the fourth annual career survey of professional online community management in Australia, and the only vocational research into professional online community management in the Asia Pacific region. It provides insight into who manages Australian online communities and the nature of those communities.

COVID-19 has had a significant impact on online community professionals and this was addressed in our research questions. A third of community professionals have reported their members using their online community more since the pandemic began and our organisations have been asking more of us than ever.

As lockdowns rolled out, millions of Australians were asked to join digital workplaces and

suddenly understood the importance of stewardship in those spaces to shape culture and support meaningful connectivity. Hybrid work is here to stay, and this is an opportunity to harness the skills and lived experience of Australian online community managers in building thriving communities of practice.

My thanks to our major partner Higher Logic. Their team are relentless champions for the value of community and the importance of good community management in steering that value. Thanks to Discourse and Quiip for their continued support of this research and the sector overall.

Those of you new to this world, I hope you are intrigued and inspired by the work illustrated within. Those of you doing the work, know that it matters.

Venessa Paech

Director, Australian Community Managers



FOREWORD

Few things are as exciting as being at the forefront of the development of a profession, especially within industry sectors that have critical roles and high levels of impact on society. Supporting the Australian Community Manager 2020 Career Survey is at the heart of Higher Logic's learning journey.

In an online one-on-one meeting with a Higher Logic community manager recently I quipped he was a rare species being a male community manager. Seems I may not have been far off the pace in terms of gender balance! We are heartened by our own experience that intentional diversity and inclusion is alive and well in the community management sphere and so the future experience of community and community managers will be well served.

The year 2020 has proven the value of the digital community as central to ongoing customer experience; support; and, the changing nature of "membership" in the 21st century. Community managers play the most important strategic and operational role in these changes yet remain largely invisible and unheralded in their work.

The data tells us we need to do better here and we are committed to that as well as committed to sharing and learning as part of the community that is Australian Community Managers.

Robert Barnes

Country Manager - APAC, Higher Logic



RESEARCH BACKGROUND & PURPOSE

The 2020 Australian Community Manager survey addresses:

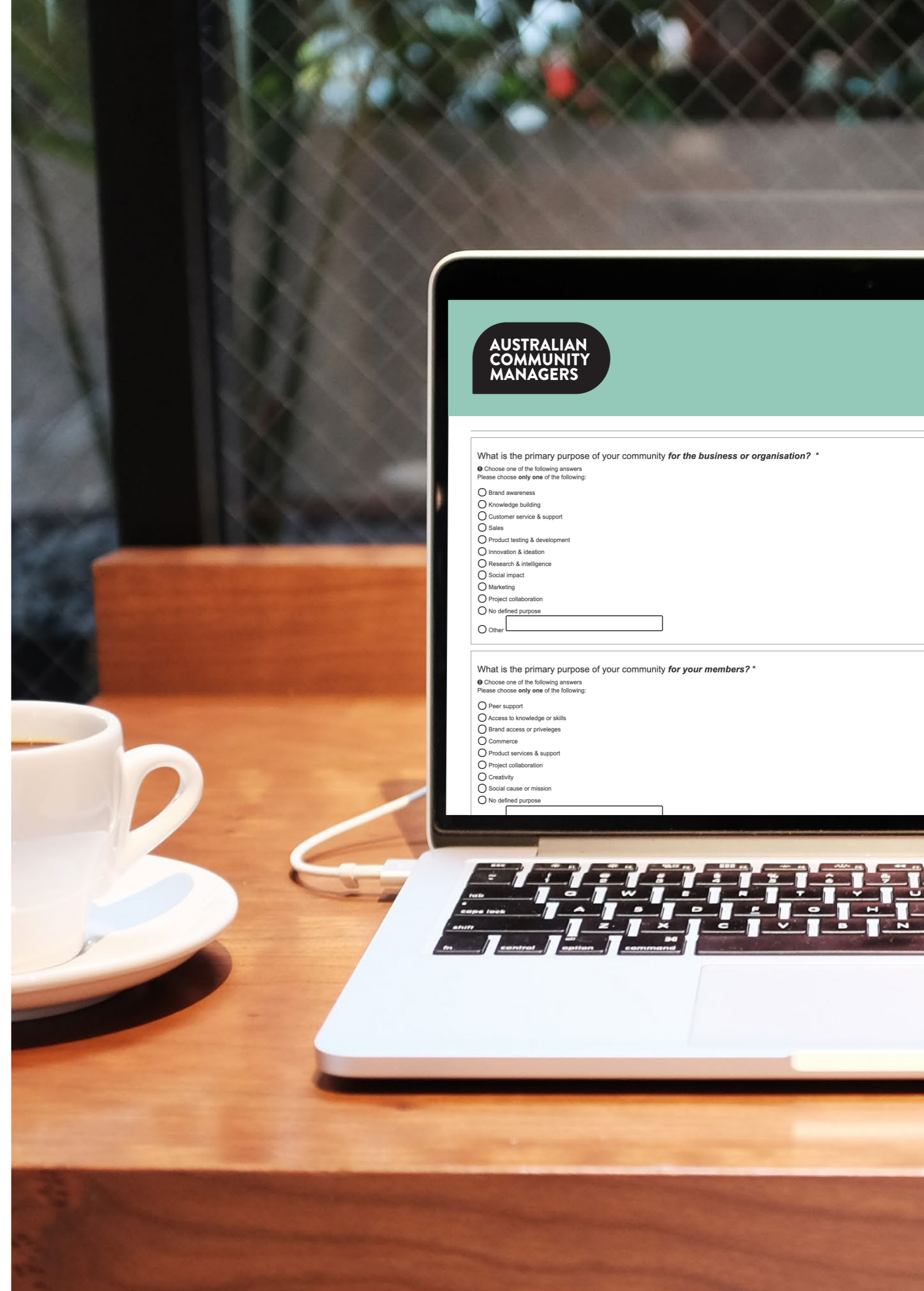
- The demographics of Australian online community managers
- Their working conditions and contexts
- Their toolsets and industry relationships
- The nature of the communities they build and oversee
- How community management is framed and integrated into Australian businesses and organisations
- Key challenges and concerns for community practitioners
- The impacts of the COVID-19 pandemic on the practice
- Trends and the future of the practice

The annual ACM Survey is the only benchmarking data captured about online community professionals in the APAC region. Launched in 2015, the survey is a resource for community managers (both professional and volunteer), recruiters and employers, journalists and media, policy makers, researchers and anyone looking to improve their understanding of online community management as a field of work in Australia.

Methodology

This survey was conducted online from 7 September 2020 until 7 October 2020, and was designed to take approximately 15 minutes to complete. There were 184 respondents in total. Anyone who manages an online community in Australia in any context was encouraged to participate. It was circulated via the Australian Community Managers professional organisation and online group, emailed to ACM members directly, and promoted widely through social media channels and individual professional networks.

The survey consisted of 47 questions, including the core questions asked year-on-year throughout the life of the survey to allow benchmarking. Additional questions are added each year in relation to key issues or trends. Most questions were binary or checkbox answers, with a handful of long-form questions intended to gain insights into participants personal views on the industry. No personal details were collected to preserve anonymity and integrity of response.



FINDINGS SNAPSHOT

The number of community professionals making **\$70K+** has increased 5%

20% of community practitioners want more training in risk and regulatory issues

Online community managers are **73% female** and **57% European** (English)



Only **34%** of community practitioners work to a documented strategy



75% of community professionals are tertiary qualified

30% say the pandemic had a negative impact on their own health and wellbeing



33% say their members have used their online community more during COVID-19

59% of community professionals work in-house for a single organisation

The use of machine assistance in online communities has **doubled** since 2019



46% have been in the field more than five years

38% are optimistic about the future of community management



67% of community managers work full-time



24% of online community practitioners say their role is valued and understood

Health/Medicine, Government and Not-For-Profit are the leading sectors hosting communities online in Australia



30% are using automation in their practice



DEMOGRAPHICS: WHO IS MANAGING YOUR COMMUNITIES?

GENDER

Online community management continues to be a strongly female dominated profession in Australia.

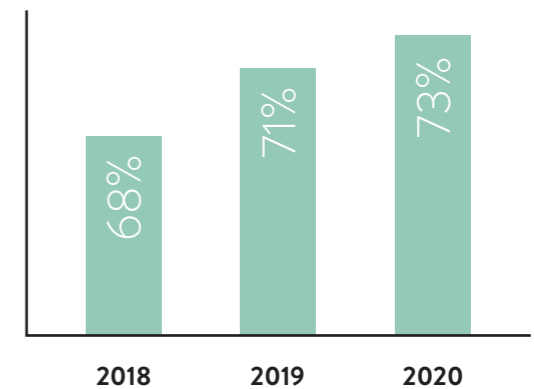
Female

73% of community managers identify as female, up slightly from 2019 (71%) and up 5% from 2018. In the first ACM Survey in 2015, the gender gap was narrower - 53% female and 38% male (remaining respondents preferred not to identify).

Representation is growing slowly, with 2% of respondents identifying as gender non-confirming and one respondent identifying as transgender. We recognise that comfort and safety levels vary around disclosure of gender identification, and this may influence these results.

Females in community management.

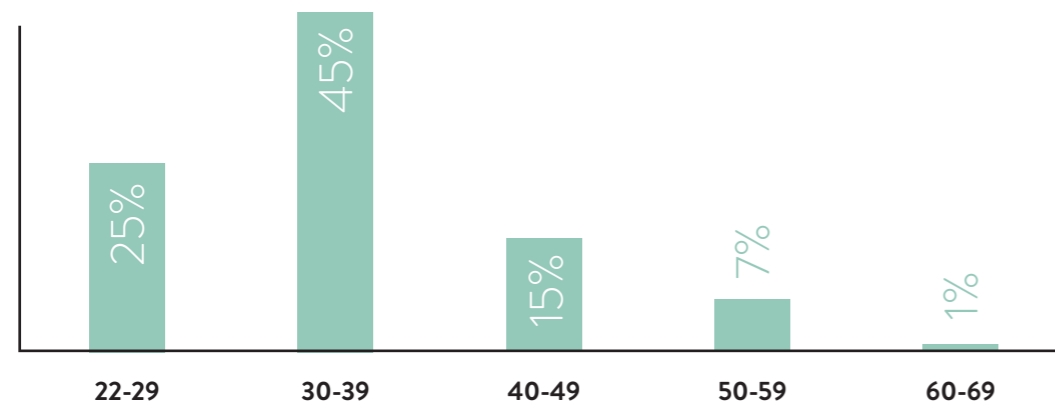
Male



Female 73%, Male 16%,
Non-conforming 2%, Trans .5%.

AGE

Community management is a millennial occupation.



Online community management in Australia is dominated by practitioners aged 22-39 (70% of respondents were under 40).

Community management roles, particularly those confused with social media management, are often earmarked as entry level. This may in part explain the continued dominance of young people in the space, who find themselves in a community named role when entering the job market.

This year we have respondents in the 60-69 year old category for the first time. Additionally, the 50-59 year old category is trending upward year-on-year; from 3% in 2018, to 4% in 2019, now 7% in 2020. These movements are to be expected as the sector matures.

We believe one factor contributing to the lack of older talent in the space is an undefined and underdeveloped career trajectory for community professionals. The nascency of the profession and its historical, institutionalised devaluing have led to a lack of senior leadership positions.

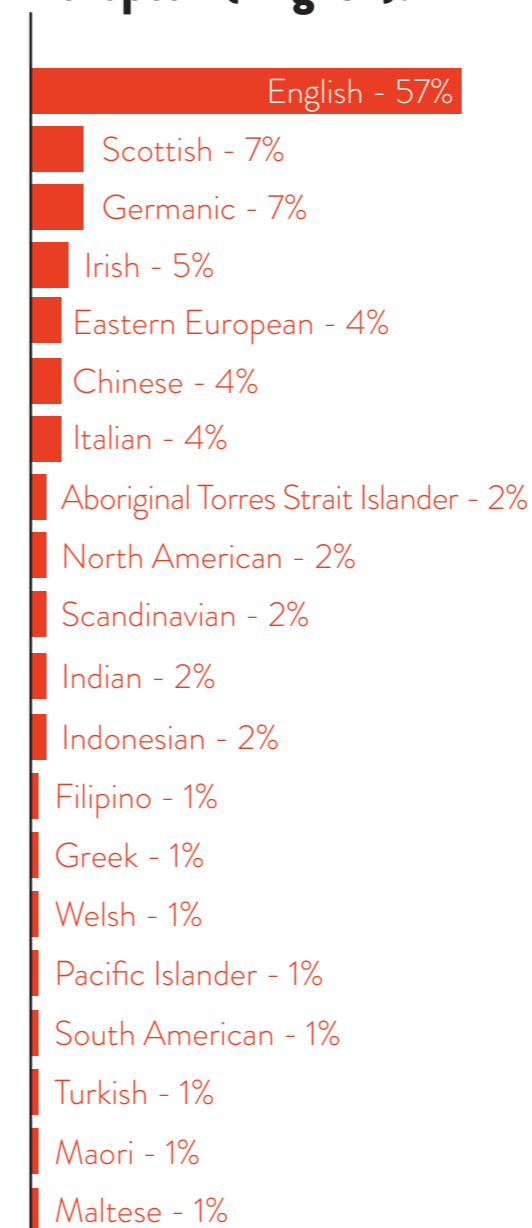
There is no clear pathway of career progression beyond a Head of Community or team leader role. The lack of Chief Community Officers in Australia and dearth of senior management roles means community professionals languish in junior positions, move laterally into related digital behavioural disciplines (such as user experience), start their own businesses, or give up the discipline entirely.

One possible advantage of an unmapped career trajectory is that many experienced community practitioners carry those skill sets and insights into other areas, benefiting organisations and colleagues in new ways and building understanding around community as a strategic asset.

However, we believe community management needs to ultimately forge a fully developed career pathway if the field is going to retain top talent and best support Australian organisations investing in strategic community building.

ANCESTRY

The custodians of online communities in Australia are 57% European (English).



This was the first year the ACM Survey included a question on ancestry and cultural identity. As an organisation we are committed to ethical data collection and resist unnecessary capture of identifying characteristics wherever possible.

In 2020 we felt it was important to add this data point into our annual research, as diversity, representation and inclusion are increasingly - and justifiably - under scrutiny.

Respondents were given a list of detailed geographic and cultural groupings and had the freedom to add their own or augment to best reflect how they identify.

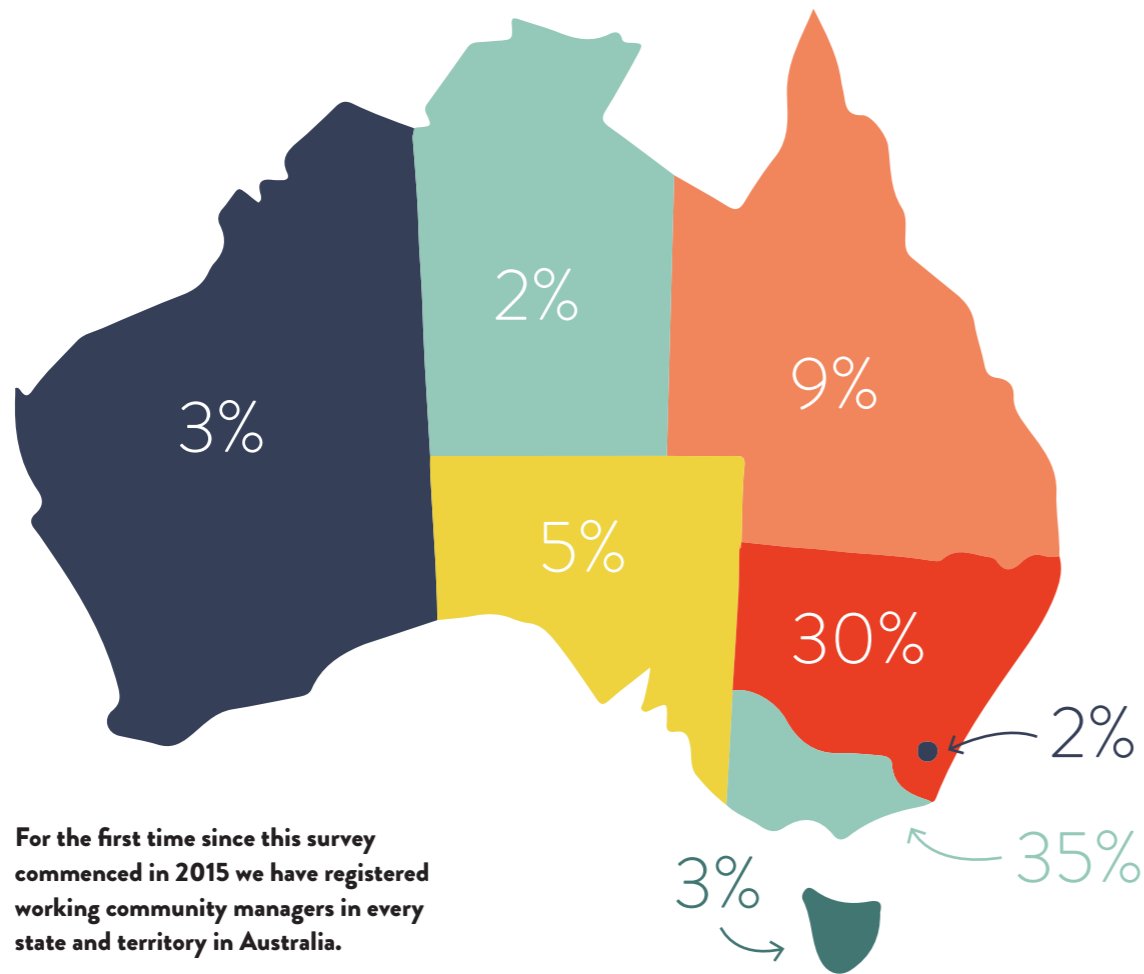
Our field is predominately white and of European ancestry. There is 4% First Nations representation, with 2% of online community professionals identifying as Aboriginal Torres Strait Islander (just under the reported national population of 2.8%¹).

We are working to be more mindful of the systems of power surrounding the work we do - from the designers and owners of the technologies where our communities are convened, to the wider society they are embedded within. So too, both community professionals who design and plan communities, and those who work on the front lines to influence culture and experience, have power and a platform we should acknowledge.

Understanding and reflecting on representation within our own industry lets us best serve Australian online community practitioners and support the creation of effective, thriving and healthy communities - our core objectives as an organisation.

¹2016 Census. <https://www.abs.gov.au/websitedbs/censushome.nsf/home/2016>

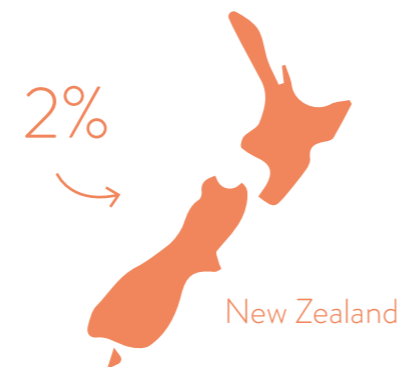
LOCATION



For the first time since this survey commenced in 2015 we have registered working community managers in every state and territory in Australia.

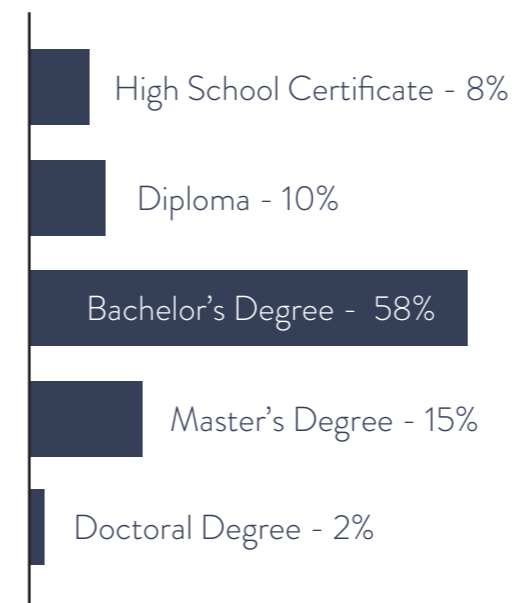
Victoria is the centre of online community management nationally, closely followed by New South Wales. Most states and territories reflect a similar volume to 2018 and 2019. Queensland and Western Australia have each seen a small increase in respondents.

In a post-COVID world where remote and hybrid work is poised to dominate, it seems likely more international community professionals will help build and manage Australian online communities. Likewise, geography is expected to become increasingly irrelevant to the practice, with community professionals not necessarily bound to co-location in corporate offices and metropolitan areas.



EDUCATION & TRAINING

75% of community professionals are tertiary qualified.



- Communications - 19%
- Marketing - 13%
- Social Sciences - 9%
- Journalism - 8%
- Creative Arts - 6%
- Sciences - 4%
- Design - 3%
- Languages - 3%
- Law - 2%
- Public Relations - 2%
- Media - 2%
- Literature - 2%
- Engineering - 1%
- Advertising - 1%
- Politics - 1%
- History - 1%



The educational background and experiences of Australian online community professionals remains consistent with 2019. There is a slight increase in those holding a Bachelor's Degree (55% in 2019 to 58% in 2020) and a 1% increase in those holding a PhD. Overall numbers in each category are relatively unchanged.

Liberal arts remain the most common background for online community practitioners in Australia. Most working in the space studied communications, marketing or social sciences at the tertiary level.

Changing education priorities.

In 2020 the Australian government announced an overhaul of fee structuring for tertiary education that more than doubles the cost of studying most humanities, in an effort to steer new students into "job-relevant" courses.²

Community management sits at the intersection of social science, communications, media and technology - an authentically multidisciplinary practice. The expected rise in digital enterprise and workplace communities alone (as a result of the pandemic) means the demand for online community expertise should grow. It seems shortsighted to discourage talent serving future focused and digitally-centric industries.

² Khadem, N. '(2020) 'Government's university fee changes mean humanities students will pay the entire cost of their degrees', ABC News. <https://www.abc.net.au/news/2020-06-20/study-arts-and-humanities-government-fees-tertiary-education/12374124>

USEFULNESS OF EDUCATION

Most respondents found their formal education 'somewhat useful' in their community practice - 46% (on par with 2019 data). There was a decrease in those who found their formal education 'not very useful' - from 30% in 2019 to 25% (on par with 2018 data).

The top three fields studied by those who said their formal education was Very Useful were: Communications, Marketing and Social Sciences.

Of those who completed tertiary education, the most relevant qualification was a Bachelor's Degree (45% of respondents found it somewhat or very useful).



25%
Not very useful

46%
Somewhat useful

21%
Very useful

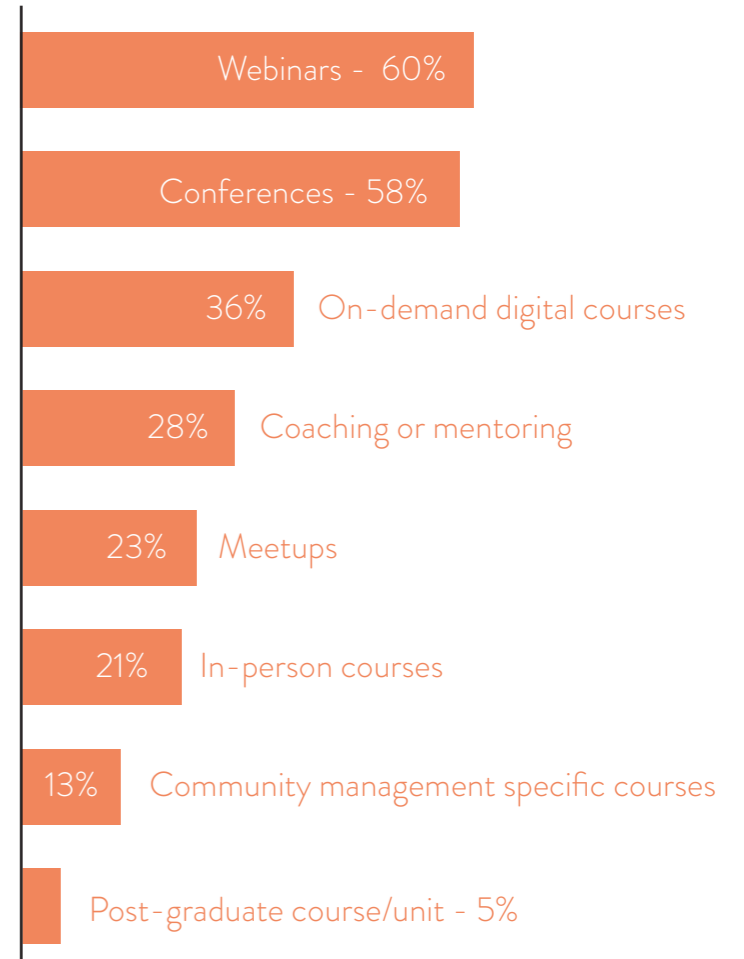
ONGOING LEARNING & PROFESSIONAL DEVELOPMENT

Community managers are always-on learners.

92% of respondents told us they regularly engage in at least one form of ongoing learning and professional development to stay on top of the digital landscape and the evolving demands of stakeholders.

Webinars and conferences (such as Swarm) were the most popular sources of this learning - 60% and 58% respectively. Community practitioners flock to flexible upskilling options they can access at their convenience and enjoy the human connection of in-person events or training wherever possible.

5% of respondents told us they engaged with one of the two post-graduate intensive units dedicated to online community management at the University of Melbourne and the University of Sydney. These intensives are the first of their kind and treat community management as a discrete practice from marketing and other fields it is often incorporated into.



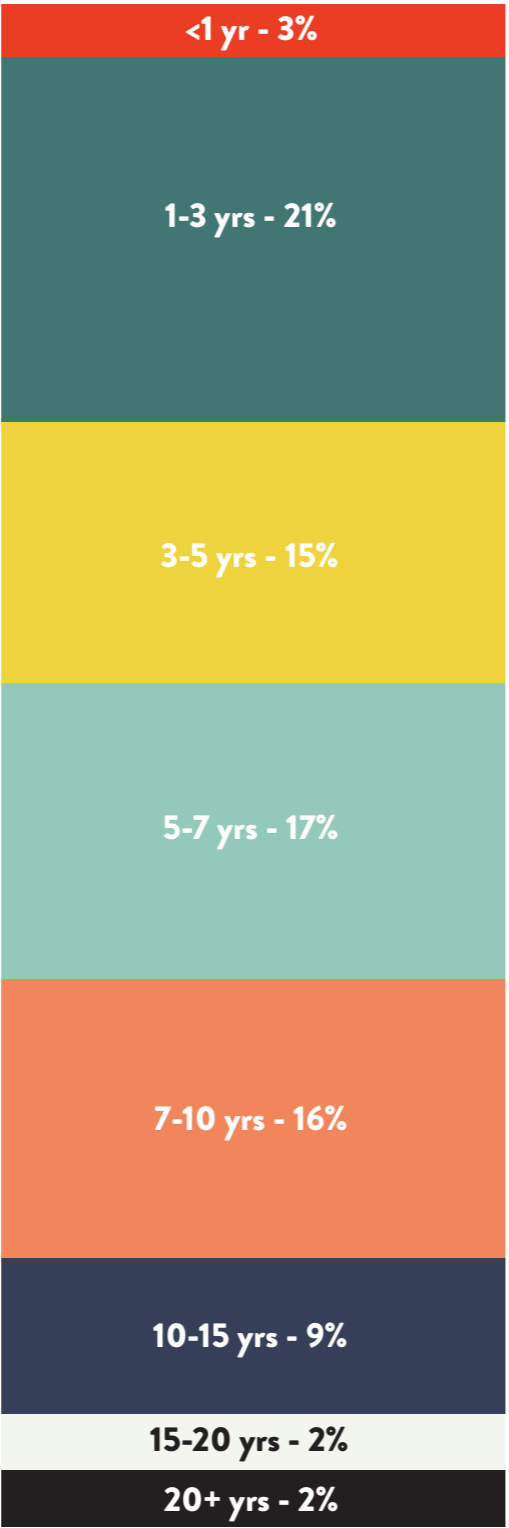
TENURE

An important milestone in longevity.

A majority of Australian online community practitioners report working in the field for more than five years (46%) - the first time this has occurred in the life of this survey.

39% have been working in the field for less than five years.

For a discipline to thrive it needs to both attract new talent consistently and retain experienced practitioners who can lead and mentor newcomers. It is promising to see a majority of respondents indicate they are mid-stage career community professionals, and likewise, a fractional increase year-on-year in those working more than 10 years in the discipline (13%, up from 8% in 2019).



WORKING LIFE

This section offers insight into the working lives of community professionals, including their salary and titles, team make-up and environment and how their practice is understood and valued.

SALARY

The average salary for community managers in Australia has remained between \$71,000 and \$100,000 annually, year-on-year. However, the number of community professionals in this bracket is up - from 36% in 2019 to 41% in 2020.

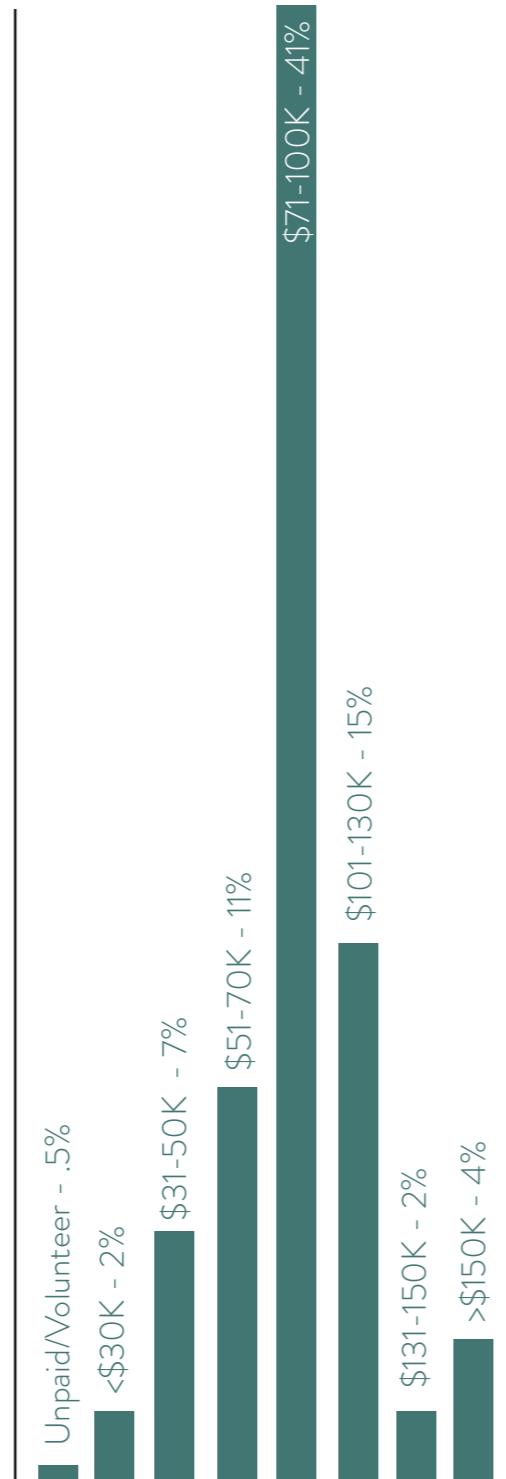
The highest paying sectors for online community professionals are:

1. Health/Medicine
2. Government
3. Technology

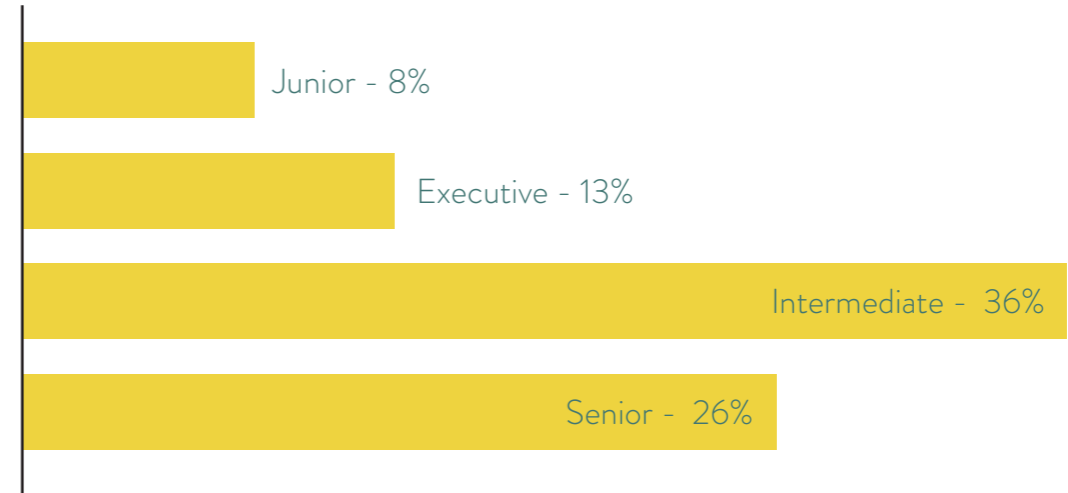
There has been a decrease in those making \$51,000 to \$70,000 per annum - from 16% in 2019 to 11% in 2020.

In 2018 30% of community managers earned below \$70,000. In 2019 this dropped to 26% and in 2020 it has dropped further, to 21%.

Despite the beginning of this positive trend, broadly there is minimal change in remuneration for community professionals. Survey respondents continue to cite inadequate compensation as a key area of improvement for the discipline, and name it as a factor contributing to dissatisfaction and burnout.



POSITION & TITLE



Fewer online community practitioners report holding senior roles (down from 28% in 2019) and intermediate roles (down from 44% in 2019).

We asked people to name their title - 170 different titles were shared. 21% of titles shared had the word 'community' in them. Only 3% of respondents bore the title Online Community Manager.

Does a title matter? To most community professionals, not at all. They care about the work, their teams, their communities and the value they can bring to stakeholders. But in their organisations and the wider world, titles carry symbolic meaning and weight. They can open or close doors.

There is not yet consensus locally or internationally on what titles in this space should look like. Perhaps there need never be. But there is an emerging view of what they could look like - more descriptive of our core practices, in ways that create opportunity. Some suggested

titles include: Digital Behaviourist, Relationship Architect, and Community Experience (CMX) Manager.

There are issues with the titles Social Media Manager and Community Manager which are almost always used interchangeably in the Australian market (less so in more digitally mature markets). Social Media Managers are usually marketing and advertising orientated, and less focused on the building of strategic relationships around shared objectives. Great Social Media Managers draw on community management practices to create highly engaged and loyal audiences, and sometimes build thriving communities.

We believe there needs to be a qualification of these two titles to help avoid the issues in the market around job and skills mismatch. To aid this conversation, we encourage employers and recruiters to access position description templates for key community roles on the ACM website under Resources.

Here is only a handful of the titles associated with the building and managing of online communities:

Community Manager *Community Development Manager*

FORUM MANAGER

Head of Community

SOCIAL MEDIA MANAGER

Social Specialist

Engagement Officer

VP OF COMMUNITY

Strategic Communications Consultant

Social Media Platform Manager

DIRECTOR OF ALUMNI

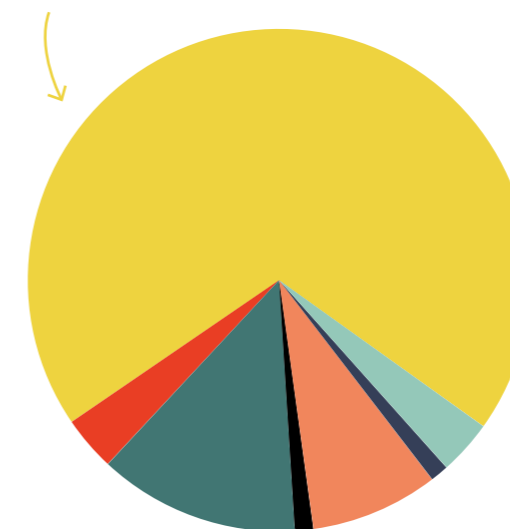
WORKING STATUS

67% of community managers work full-time.

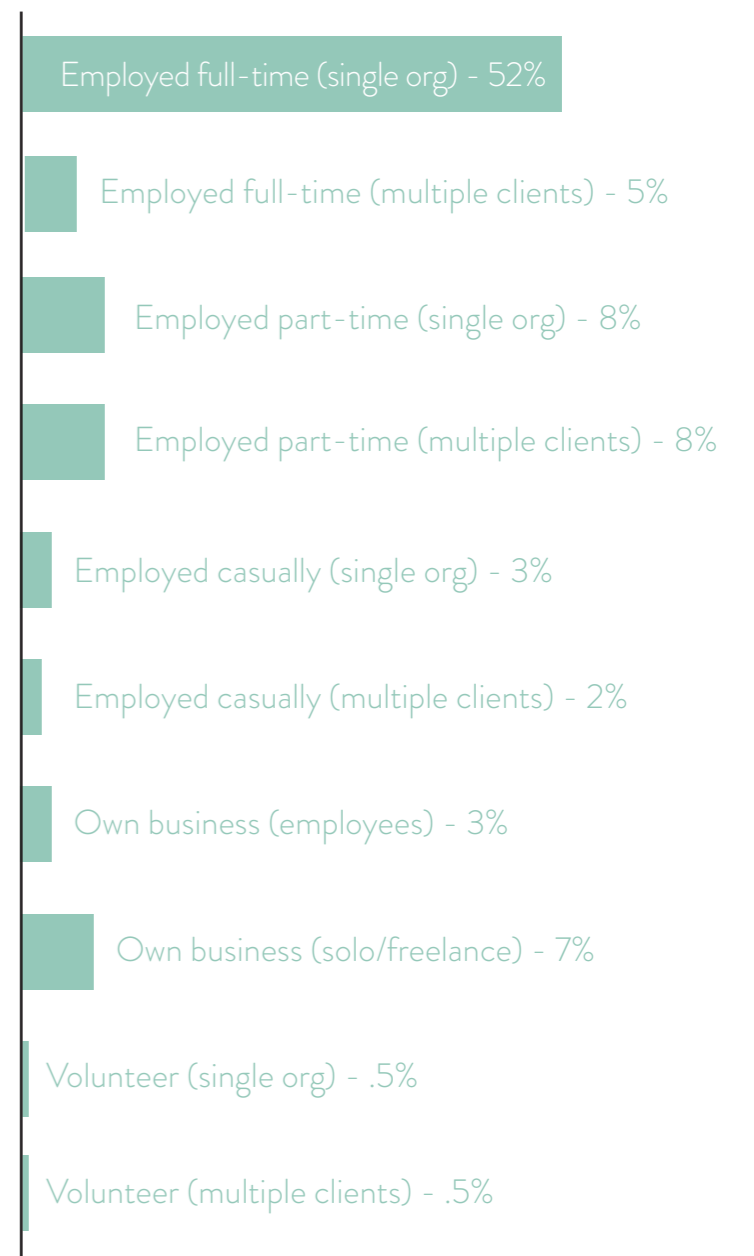
The number of community professionals working in-house has remained static year-on-year - 59%.

Freelancing has dipped from 6% to 4%, while consulting has risen from 7% to 8% in the past 12 months.

In-house working for single business/org 59%



Agency working on single client 3%
 Agency working on multiple clients 11%
 Consulting/Consultancy for single client 1%
 Consulting/Consultancy for multiple clients 7%
 Freelance working for single client 1%
 Freelance working for multiple clients 3%



INDUSTRY PROTECTIONS

Are you in a Union?



Do you have insurance?



Despite the risks and responsibilities of online community management, there is still only a small percentage of practitioners who are protected by a union (the MEAA/ACM Community Management membership), and have insurance to buffer them against liability.

Those who work in-house can often seek support and coverage from the organisation. Community professionals should ensure they know if and how they are protected and supported.

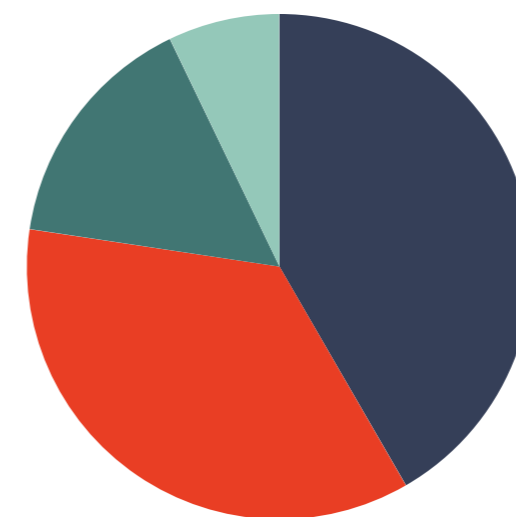
TEAM MAKE-UP

Community is dominated by small teams.

As with all previous ACM Surveys, the majority of community professionals in Australia work on small teams focused on community. The number of community professionals managing a team has increased year-on-year from 16% in 2019 to 19% in 2020.

If you work on or manage a team, where are they located?

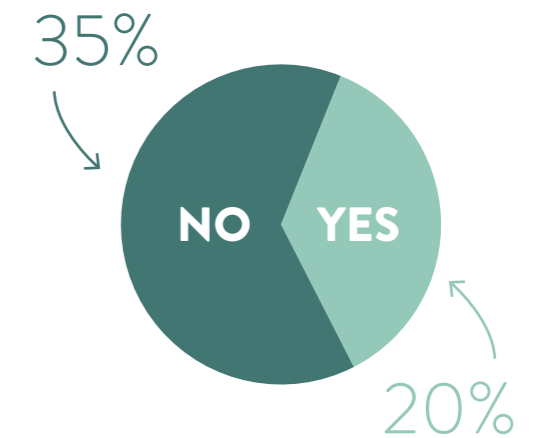
- Distributed globally 14%
- Distributed nationally 12%
- Same location as you 29%



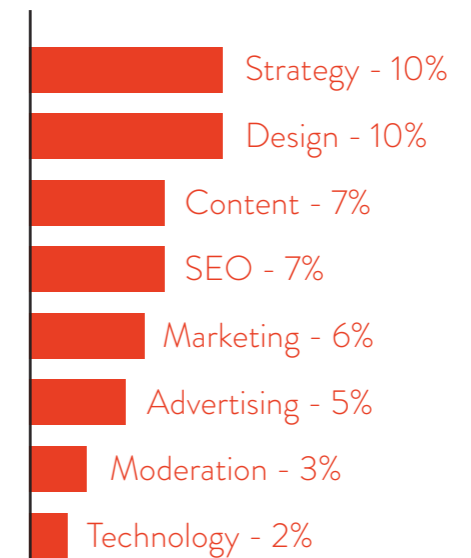
On a small team working on community 35%
 I'm the only one working on community 30%
 Manage a small team working on community 13%
 Manage a large team working on community 6%

THIRD PARTY ROLES

If you work in-house, do you work with agencies or consultants on your community?



What areas do third parties work on?

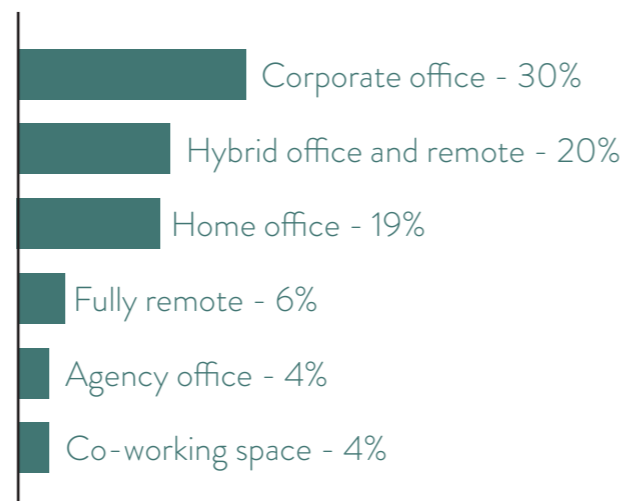


ENVIRONMENT

A majority of community professionals work outside traditional offices.

49% of community managers work outside the traditional office. This has increased year-on-year - from 37% in 2019 and 33% in 2018.

The pandemic makes this unsurprising news. Online community work is well suited to remote and distributed operations, and we would expect this to increase in line with other trends around future work design.



NUMBER OF COMMUNITIES

20% of community managers work on more than one community at a time.

VALUE & UNDERSTANDING

Community managers are winning hearts and minds

The story of community management has long been one of untapped potential, but there are signs this may be changing.

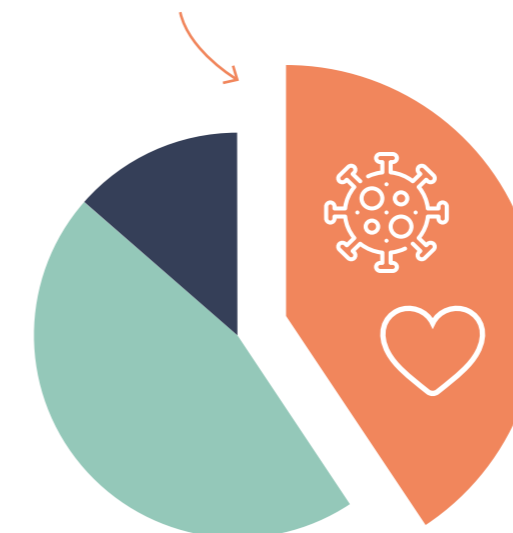
This annual career survey and other research efforts globally have pinpointed the gap between what communities and their practitioners can accomplish for organisations, and the reality of how they are understood and valued.

While this gap still exists, there has been a notable year-on-year jump in how Australian community professionals say their work is received.

In 2019 only 2% of respondents said they felt their role was understood and valued. In 2020 this has climbed to 24%. We believe there are two main factors impacting this shift: the ongoing development of ROI modelling within the online community body of knowledge, and the pandemic, which spawned a sudden and concentrated need for online engagement and collaboration, prizing the skill sets to build these.

Recognition of your work and its value has a lasting impact on personal satisfaction and professional success. People can only toil in isolation for so long. The pandemic has provided momentum we can collectively transform into needle-moving measures that ensure our practice is effective and our people are fulfilled.

My role is understood and valued 24%



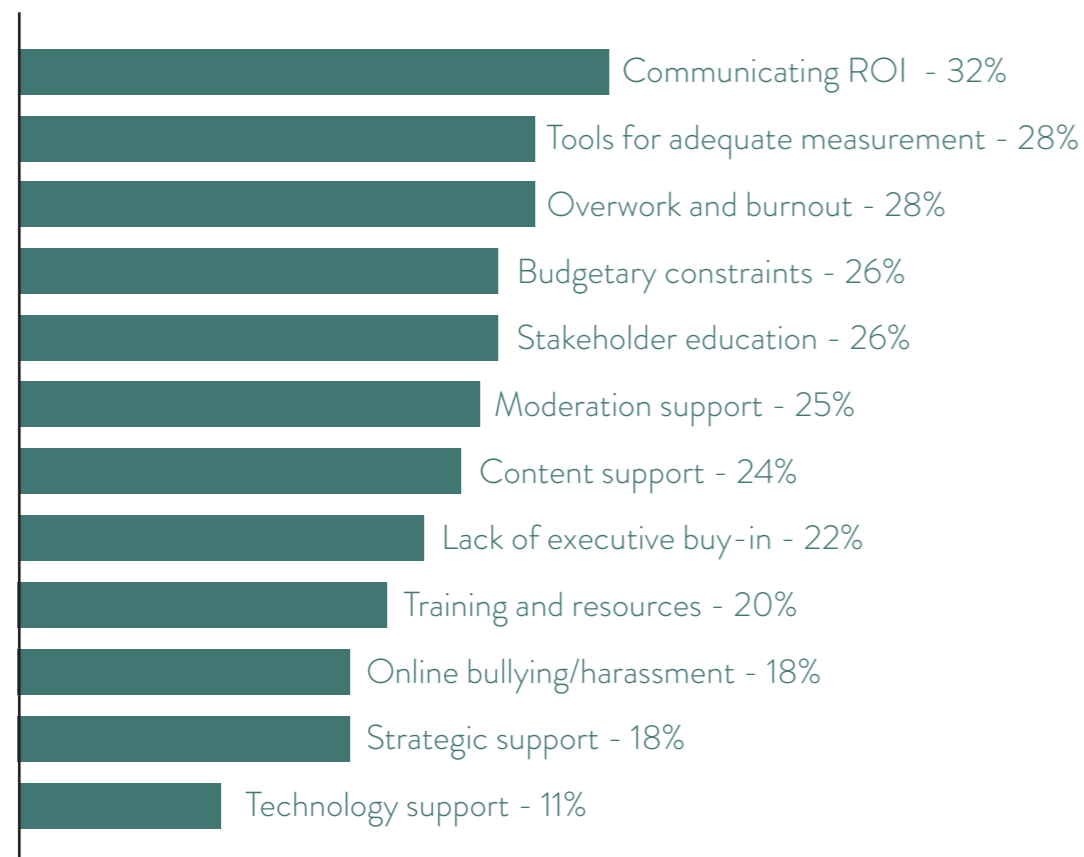
My role is partly understood and somewhat valued 27%

My role is not well understood and not valued 8%

KEY CHALLENGES

Underlying challenges in communicating and measuring value.

The leading challenges for community managers are communicating ROI, tools for adequate measurement and overwork and burnout.



Importantly, many of these obstacles are interconnected. Stakeholder education can improve executive buy-in, leading to better aligned ROI modeling and the ability to find or build the right tools to measure this. Building this understanding can be exhausting, and combined with factors such as online harassment, accelerates overwork and burnout.

After consecutive years of decline, the number of community professionals facing online

harassment or bullying has risen in 2020 to 18%, a level not reported since 2015. While we are not yet certain why this increase has occurred, the convergence of continued online toxicity, fervour surrounding the U.S. presidential election and collective anxiety around the COVID-19 pandemic may be factors. Though 18% is a concern, these numbers are actually low in comparison to Australians overall experiences with online harassment (one in three according to a 2019 study from The Australia Institute).³

³ *Trolls and polls – the economic costs of online harassment and cyberhate (2019)*, The Australia Institute, <https://www.tai.org.au/content/online-harassment-and-cyberhate-costs-australians-37b>

KEY BENEFITS

Community professionals are ‘people people’.

We asked community practitioners what they found most enjoyable about their work. Their responses were clearly aligned under four themes:



Community professionals in Australia are ‘people people’. They relish facilitating connection between people to produce new value, and enjoy the dynamism of this work. They like the visibility of activity and impact that the digital space affords. They are fulfilled by the chance to make a difference to their organisations, their

participants and the culture of the Internet overall.

A portion of respondents also spoke about the attractiveness of working in a comparatively new discipline, where they have the chance to shape and steward the way forward with peers.

Human Connection

“Connecting people and humanising the work our organisation does. I also enjoy celebrating and communicating the wins we achieve with our community engagement and what that means for members of our organisation.”

“The interactions with people! It’s irreplaceable.”

“The ability to facilitate connections with members who would otherwise not have had the opportunity to meet.”

“I enjoy seeing the community being nurtured. I enjoy seeing them grow and forming relationships with each other.”

“Engaging with passionate community members in positive shared spaces.”



Impact Visibility

“Love being able to make a noticeable difference.”

“It has put my organisation on the map and constantly in the front of people’s minds. It is an easy way to report the impact of donations to people (e.g. by sharing an impact story).”

“Being able to easily measure things like reach and engagement.”

“Seeing users help each other. Results!”



Creativity

“It’s very different from my usual role and I love having a creative outlet.”

“Constantly changing projects and ability to be creative.”

“Being able to create content that my community finds engaging.”

“Dynamic and constantly changing environment, great balance of strategy and creativity.”



Positive Influence

“The power to really connect people and to make a small part of the internet a better place.”

“The impact that can be made by creating safe online spaces for connection.”

“Creating a community that empowers each member, and professionally it’s refreshing to see more graduates interested in the psychology of community, and how to maintain and scale a healthy community for long term strategic decisions.”

“The power that community has to make change and put good into the world. I get to help people as a Community Manager - sometimes it’s something small but other times it’s something that can change their lives for the better.”

“Supporting the building of purposeful relationships. Helping people and organisations solve problems using community as a model and approach. Generating collective value.”



ABOUT OUR COMMUNITIES

This section explores the make-up of the communities managed by community professionals in Australia; their strategic role, platforms, industry sectors, success measures and allocated budgets.

STRATEGY

We are losing strategic opportunities.

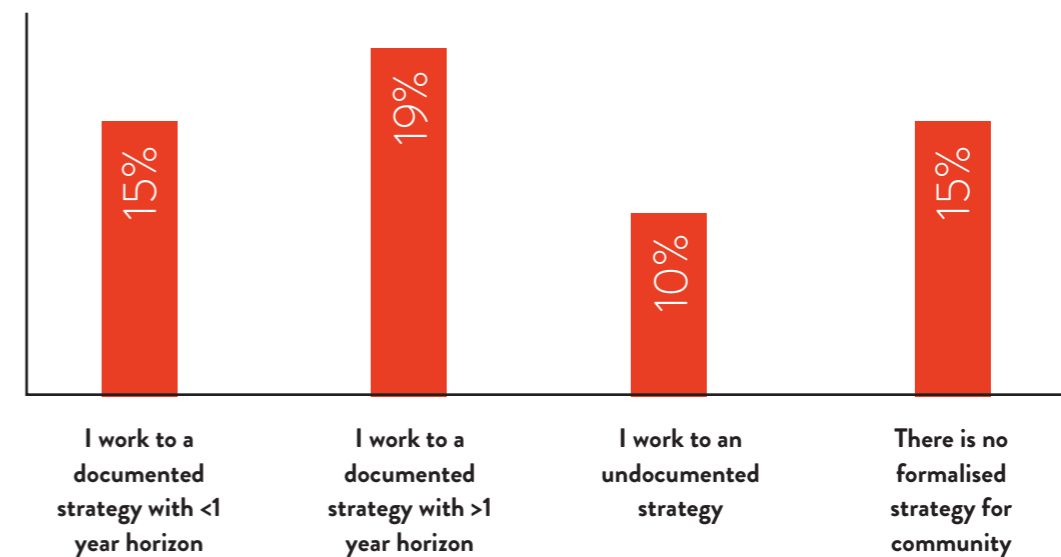
Fewer community managers than ever are working to a documented strategy - 34%. This is down from 37% in 2018 and 35% in 2019. Only 19% of respondents said they had a documented plan beyond 12 months.

A strategic mindset is an important part of successful online community management. Codifying a strategic plan that connects community design and experience with organisational goals is a foundational best practice. Documentation is imperative to achieve buy-in and harness strategic opportunities.

The digital environment (and wider society) now arguably moves too fast to maintain a comprehensive long view, however at minimum, a 12-month view on why, where and how you are steering your community is essential to stay on track and measure success.

The lack of senior and strategic community specialist roles should be addressed here. Decision makers who lack training and understanding around the value of online communities are less inclined to see the need for a strategic plan, or be equipped to create one that a more junior community professional can implement.

The result is rudderless communities that don't command buy-in and are unable to generate meaningful results.



PURPOSE

Communities need a reason to exist. Without solving a problem or meeting clear needs, an intentional or strategic community is destined for failure.

Benefits must be shared or the model is unstable - both the hosting organisation and participants should each derive value.

The top three organisational purposes for online communities in Australia are brand awareness, marketing and customer service or support. This is unchanged from 2019 and 2018.

The top three purposes for members are access to knowledge and skills, peer support and product or service support - also unchanged with previous survey data.

There are a number of noteworthy jumps in respondent data that point to organisational experiments with online community purpose. Organisations leveraging online communities for research and intelligence have jumped significantly - from .5% to 13% year-on-year. The number reporting use of online communities to generate sales have also jumped, from 1% in 2019 to 13% in 2020.

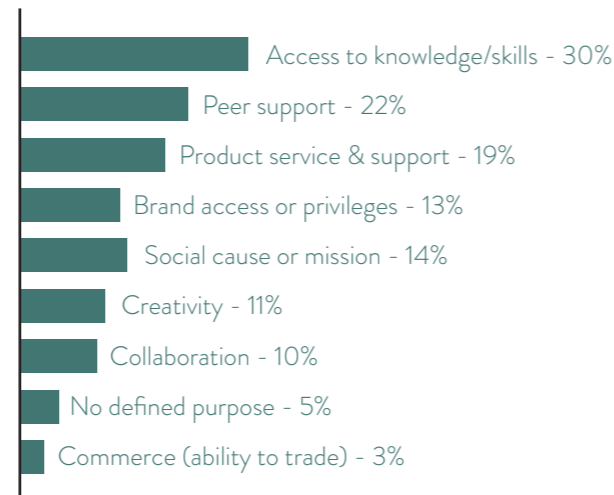
Since this survey began in 2015, virtually no Australian organisations have been consistently using online communities for innovation, ideation, product testing and development. We have flagged this as a missed opportunity. In 2020 there are signs of improvement.

Innovation and ideation has climbed from 1% to 9% and product testing and development from 1% to 6%.

What is the purpose of your community for the business or organisation?



What is the purpose of your community for your members/users?



PLATFORMS

Big Social reigns in Australia, meaning platform diversity - and strategic opportunities - are untapped.

We asked which platforms community managers use to build and maintain communities. These platforms may be their choice (usually if they are in a more senior or strategic role), or at the request of their employers or clients.

This year we asked for all platforms used - as communities are increasingly decentralised across an ecosystem - and the main platform if any.

Australian community managers named 38 distinct platforms they used in their work, including custom built community platforms on their own apps and websites.

Australian online communities are still primarily run on major social networking platforms (dubbed 'Big Social').

Despite aggressive marketing and some improvements to administrative features, Facebook Groups has only seen a small increase in usage year-on-year - from 20% up to 24%. It is hard to move established communities, so this may be a factor.

The leading dedicated community platforms are Khoros (formerly Lithium), Salesforce and Discourse. Mighty Networks and Vanilla Forums have entered the landscape (2% each) and Bang

The Table remains a consistent choice for civic and local government online communities.

Slack has dropped in usage as a primary home for community builders - from 13% in 2019 down to 3% in 2020.

The global interest in strategic online communities and the pandemic have accelerated the proliferation of platforms. ACM has noted the launch of no less than 10 new community platforms since March. These are partly in response to the challenges of working on Big Social. Though these platforms are the most populous, they are limiting in terms of configurability, access and influence. There are also ethical issues with major platforms, well documented in the media.

Community practitioners should always select the best tools for the job - considering what behaviour and activity they want to empower. For organisations looking at community as a strategic asset, a third-party social networking platform is an ineffectual choice versus a dedicated platform that can meaningfully integrate with operations. A community mainly interested in advocacy and reach may thrive on social media platforms.

Preserving choice is key. A more distributed platform landscape in Australia can increase the reach, influence and credibility of online community management practice.

WHAT PLATFORMS DOES YOUR COMMUNITY USE?

Facebook - Instagram 45%	Facebook - Workplace	9%	Drupal	2%
	Slack	8%	WeChat	2%
	Linkedin Groups	8%	Higher Logic	2%
	Khoros	6%	Tribe.so	1%
Email 33%	Salesforce Comm. Cloud	5%	OpenSocial	1%
	Custom built platform	5%	ForumBee	1%
	Discord	4%	Tribe.so	1%
	Twitch	4%	Ning	1%
Twitter 32%	Tiktok	3%	Switchboard	1%
	Zendesk	3%	CMNTY	1%
	Microsoft Teams	3%	Hivebright	1%
YouTube 26%	Discourse	3%	UserVoice	1%
	Mighty Networks	2%	Weibo	1%
	Bang The Table	2%	Trybz	1%
Facebook - Groups 24%	Vanilla	2%	Bevy Labs	1%
	Atlassian Confluence	2%	Reddit	1%
	Yammer	2%		

WHAT IS THE MAIN PLATFORM YOU USE FOR YOUR COMMUNITY?



Facebook
69%

Custom platform	5%	LinkedIn	2%
Salesforce	5%	Mighty Networks	1%
Twitter	5%	Open Social	1%
Discourse	3%	Slack	1%
Email	3%	Trybz	1%
Khoros	3%	Reddit	1%
Centercode	2%	YouTube	1%
Discord	2%	In-person	1%
Higher Logic	2%		

MIGRATION

Migrating to a new platform is often a part of the community journey.

This typically happens with growth over time or scale, but can also occur if functionality is no longer fit for purpose, if support or product iteration is waning, or if there is a need for more strategic integration into business systems.

5% of online community professionals said a migration was planned within the next 12 months.

We asked those who were planning a move to tell us why. The most common reason was a change in strategy.

7% needed different or customised features, while 3% said a desire to work with more ethical technologies was a motivating factor.



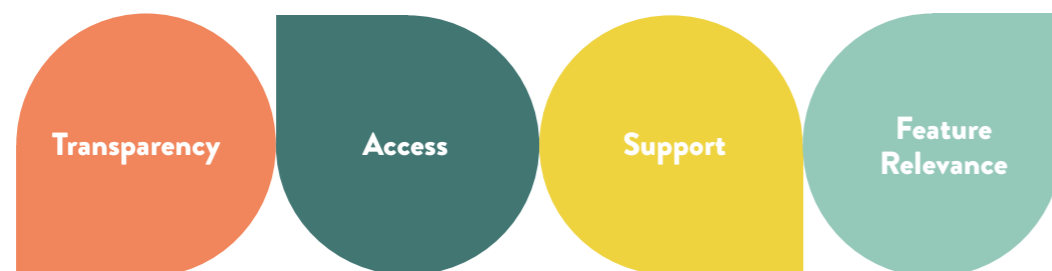
PLATFORM RELATIONSHIPS

“More transparency over algorithms, more features for community managers.”

“Social platforms are restrictive, support is limited and generally dependent on spend.”

Since 2019 we have asked community managers to describe their relationship to the platforms they work with to capture and track areas working well and room for improvement.

This year their responses fell into four main themes:



This is similar to 2019 themes of consistency, responsiveness, relevance and transparency, suggesting there has been limited progress year-on-year.

TRANSPARENCY

Community practitioners want transparency over algorithmic decision-making, product roadmaps and any other area that directly impacts their work and success. Where they have raised issues, they want better communication around the status of those issues.

“It’s a battle to stay up to date with algorithms to ensure the right people are going to be able to see our content.”

ACCESS

“We have no access to any real or human help.”

Community managers told us they also want access to test and trial features that could help their community and inform their strategic plans.

“A big part of my work relies on knowing how data is gathered and amalgamated. It’s really frustrating knowing data is available but there’s no option to view it.”

SUPPORT

Many community professionals said they would like a more proactive relationship with their platform provider.

“I’d like them to come to us with examples from other clients of how we could improve our community.”

FEATURE RELEVANCE

“Facebook’s development emphasis is on the advertising side, not on the community management or content development side.”



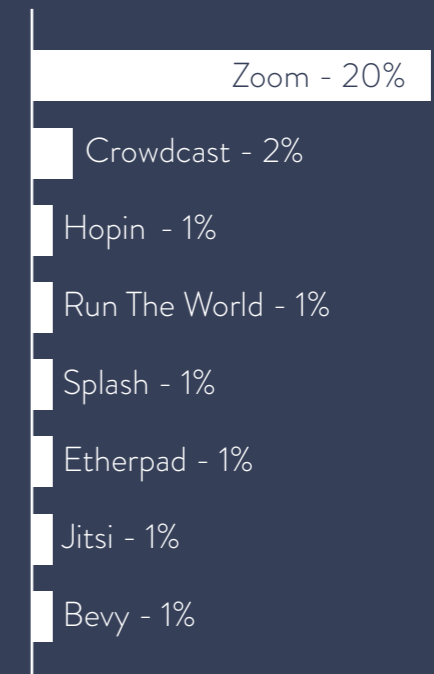
Engaging communities

Community managers use a multitude of engagement techniques and practices to connect their participants, cultivate experiences and deliver value. This year we asked about events and live streaming, as observationally we have seen both increase during the pandemic.

30% of community professionals use live streaming to engage their communities and 60% are using events.

Of those running events, Zoom was the most popular platform, with a cluster of other platforms each used by a small number of practitioners.

Event platforms used to engage communities:

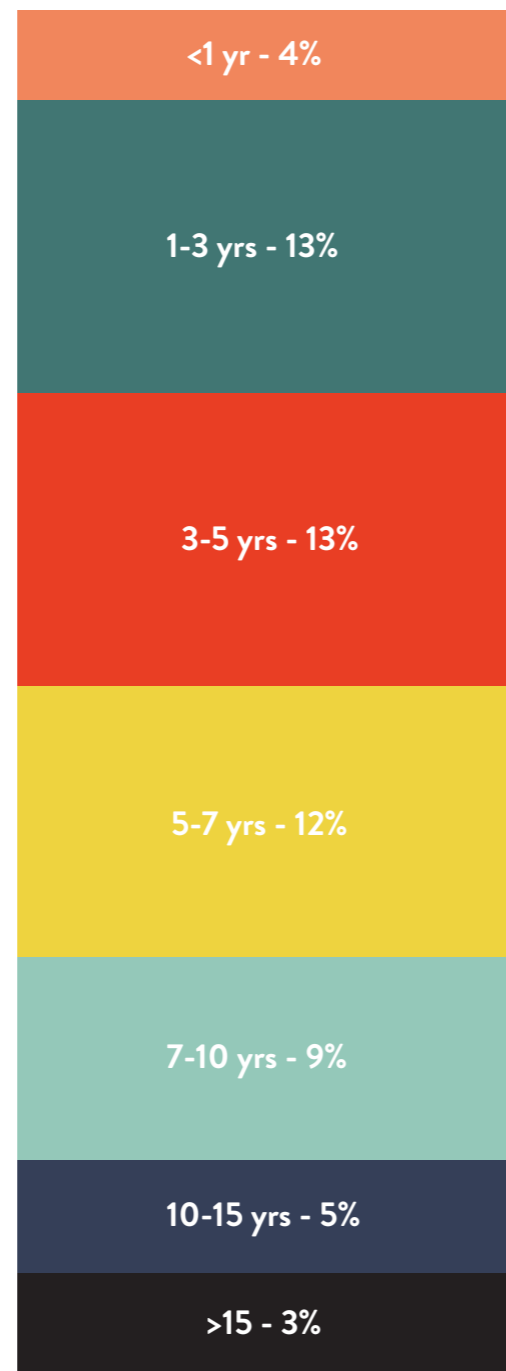


AGE OF COMMUNITY

The majority of online communities in Australia are between 1 and 5 years old.

Most of our communities are still young - between 1 and 5 years old. Communities between 5-7 years, 7-10 years and 10-15 years of age have all enjoyed a bump upward, which bodes well for their long-term health.

Communities don't need to last a long time to deliver benefits to an organisation, but certain community approaches can generate strong cumulative ROI.⁴

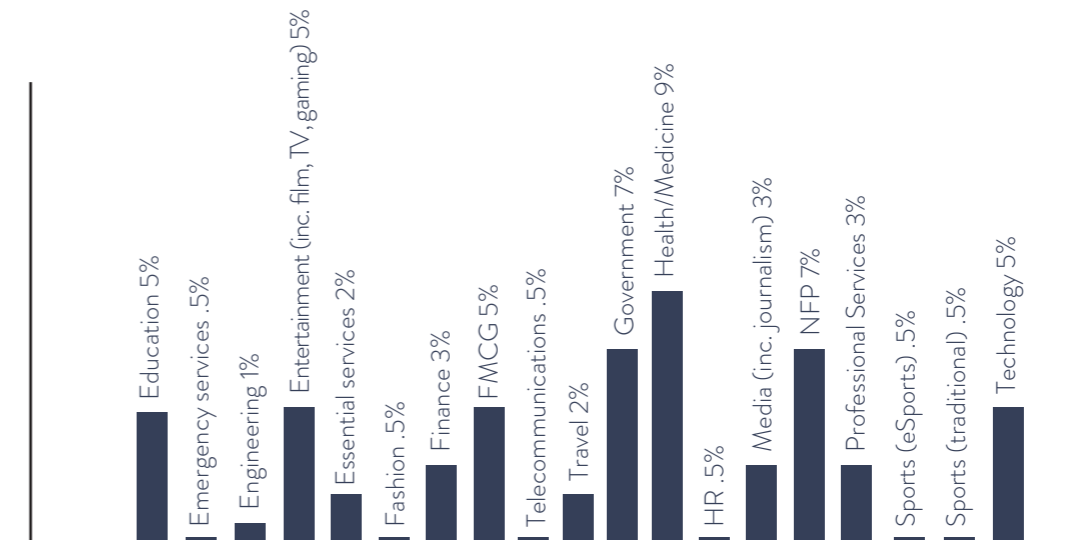


INDUSTRY SECTOR

Mission driven communities dominate.

Health/Medicine, Government and Not-For-Profit are the leading sectors hosting online communities in Australia. world in intentional communities for therapeutic purpose, particularly mental health. SANE, Beyond Blue and ReachOut are stalwarts in the space, with newer communities emerging to support recovery from substance addiction and promote healthier behaviours.

To reflect the exponential rise of eSports globally we have broken out the Sports category into eSports and traditional sports.



A majority of respondents - 47% - are subject matter experts in the topic or area their community serves. 37% do not hold topical expertise for their community.

Community practitioners often become a defacto specialist in certain types of communities over the course of their career. For example, a community manager who works mainly with clinical or peer support communities will gain deep knowledge of that area, whereas a community manager working in fan communities for media organisations will gain different specialist experience. Community management foundational principles and best practices are transferable, but context matters.



BUDGETS

Community budgets are shrinking.

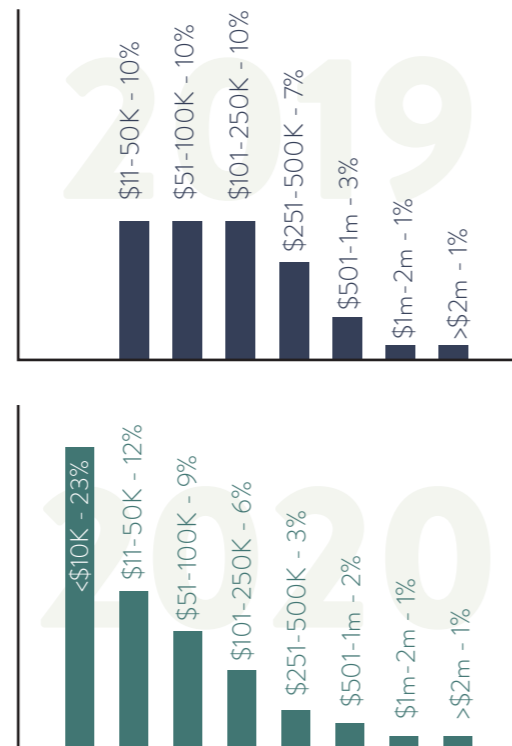
Data from this year's survey supports observations from community professionals around the country - they are doing more with less.

The majority of communities are now running on operational budgets of less than \$10,000 annually (not including staff salaries).

The rise of new community platforms at lower cost will also impact these budget lines; spending less on a tool and more on strategy, moderation, content creation, events and other aspects of community management.

The three top industry sectors investing in community are: Health/Medicine, Government and Technology.

What is the annual budget for community operations in your organisation (exc. staff)?



MEASURES OF SUCCESS

How success is measured in a community is dictated by context. What is the purpose of the community? What are the objectives for the hosting organisation? What are the goals and needs of members and participants? Best practices in community management include a combination of activity metrics (what people are doing) plus sentiment and relationship health metrics (how they feel about the community and each other).

Measures most commonly used by community managers. Ranked most used to least (1 is most used).

1. Social Sentiment
2. Volume of Interactions
3. Quality of Interactions
4. Social Impact/Outcomes
5. Traffic/Downloads
6. Acquisition
7. Revenue Gained
8. Knowledge Generation
9. Questions Answered
10. SEO/Digital Footprint

Social sentiment and volume of interactions top the list in 2020 - a change from 2019 where quality and social impact were dominant. This may be reflective of the additional commercial pressures on community professionals during the pandemic and as some respondents reported, the pivot to sales at any cost. When community strategies are more mature and integrated, additional measures, such as knowledge generation, social impact and revenue are captured more often.

50% of respondents are regularly using Community Health Checks that measure Sense of Community factors, a drop from 2019. Again, we believe this is likely due to economic pressures. It's important to note however that commercial outputs are less likely with an unhealthy community - monitoring community health should always be a priority.

COVID-19

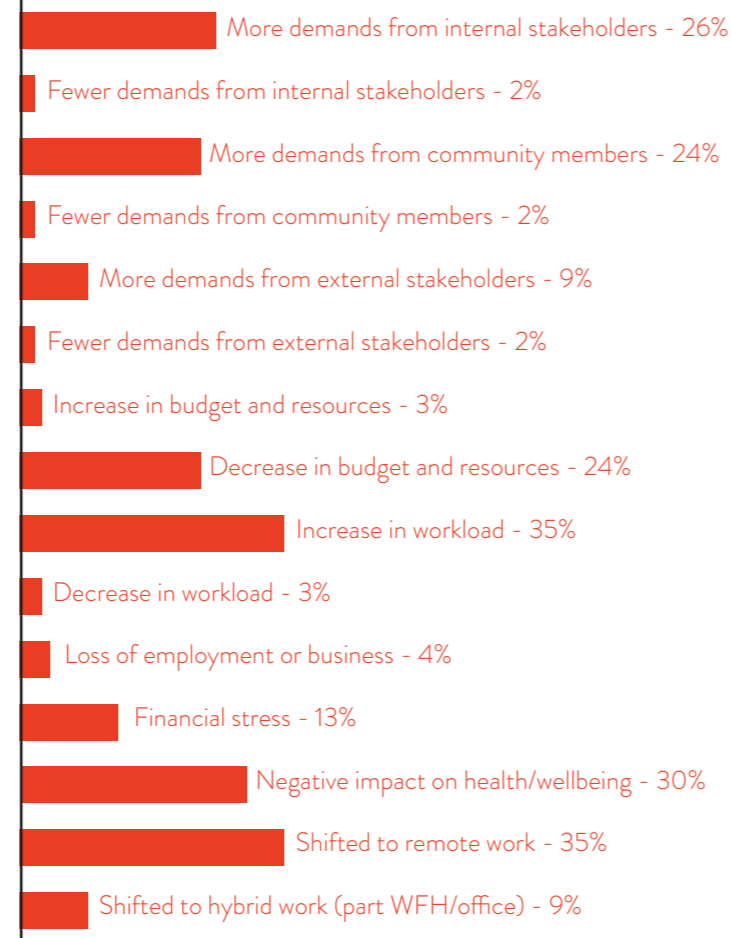


theories about the pandemic. They are grappling with these changes in user behaviour, adapting cultures and protocols accordingly, while maintaining their primary focus and responsibilities.

“It’s been hard to moderate COVID discussion.”

To capture the variety of impacts on community practitioner lives, we asked four orienting questions: the most significant impacts now, the expected impacts in the year to come, the nature of impacts on your members and participants, and any other changes to working life as a result of the pandemic.

2020 pandemic impacts



“We’re all feeling the stress and the community feels tense too.”

“There’s been decreased hours across the business, but more workload for community.”

The 2020 COVID-19 pandemic has been profoundly disruptive to work and life around the globe and Australia is no different. Lockdown and social distancing policies have forced us into a macro-experiment in collaboration, communication and community. While many have faced job losses, business closures and a slowdown of work, online community managers have been reporting a surge in demand around their skill sets, as organisations found themselves needing to shift a customer or workplace community online, or start building one from scratch. There have been extra pressures with no extra time or resources relief to navigate them.

“We’ve had to drop all plans and move to reacting to things day-to-day.”

Additionally, the way people engage with online communities as users has changed in light of the pandemic; some presenting more anxiously and aggressively, others needing greater support and solace. Community professionals have had to make judgement calls about how much COVID related discussion to allow or invite, and how to moderate disinformation and conspiracy

What impact will the pandemic likely have on your work in 2021?

“There’s been a swift uptake in business as everyone struggles to move their communication online.”

The effects of the pandemic in the coming 12 months are unpredictable, however community managers believe budget and resourcing cuts to their work are likely (28%), with a further 9% expecting team reduction.

The role of community will be under the microscope, as organisations look to unlock new or hidden value that better addresses changing priorities. Encouragingly, 20% of community practitioners envision a more strategic role for community within their organisations next year, while 15% are confident of changes to core community purpose.

30% plan to run more virtual events to engage their communities.



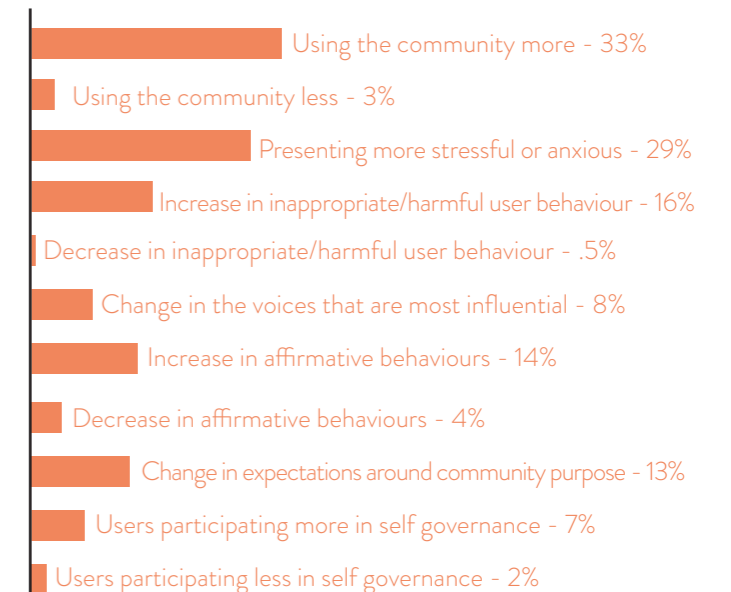
What changes if any has the pandemic created amongst your community participants?

“People are anxious and it’s affecting how they engage.”

Community professionals across all industry sectors report a notable increase in how much their participants and members are using their community since the pandemic began (30% say usage has increased). If people find escape, solace or help in an online community experience, it follows that they will seek this out more during times of stress or crisis.

16% of community managers say there has been an increase in inappropriate or harmful user behaviour within their communities during the pandemic. This may be due to the compounding stresses mentioned above.

Yet there has also been a 14% increase in affirmative behaviours in communities on their watch, with users coming together, promoting belonging and meeting each other’s needs.



We asked respondents to elaborate if they wished.

They told us they're grateful for the opportunity to use their skills to assist during this time and hope it heralds greater understanding around the value of their work.

Some were concerned that a 'gold-rush' of sudden community experts seeking to capitalise on the opportunity risks devaluing their work further. Many spoke about stalled momentum and worries that the economic pressures of the pandemic will change the focus of the role and invite unrealistic or inappropriate measures.

The following verbatims are indicative of their overall contributions:

“Community management has seeped into other areas of the business as events, sales, etc. become virtual – our work is becoming clearer to people who wouldn't otherwise see it.”

“More companies shifting to remote work has seen a greater need for well managed enterprise communities.”

“I think there's a lot of risk for Communities and Community Managers right now to shift purpose. My own programs have shifted entirely from social impact to revenue generation. My KPI's switched from last financial year from traffic and brand impact measures, to leads generated from the community and total \$ generated for this new FY.”

“More creative opportunities with clients able to devote more time to thinking about their communities' interests.”

“More internal stakeholder demands, coupled with an increase in bad 'engagement' ideas from stakeholders who don't work in online communities but think they are experts because they have a Facebook account.”

“My community are reaching out to me for support but I no longer work for the company. They feel lost and don't know who to talk to.”

“More people 'get it', or at least think they get it. There's more demand, but there still needs to be more education. Suddenly everyone's a community expert.”

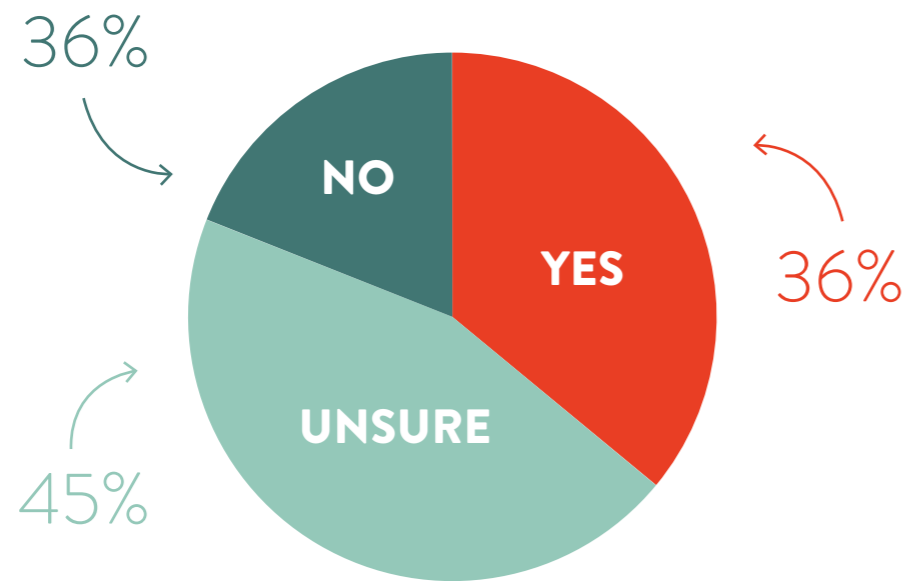
“It's given me more ground and rationale to advocate for a community and hopefully start getting green lights to build and launch.”



**THE
FUTURE**

FIVE YEARS TIME

Do you think you'll still be working in online community management in 5 years time?



Among those who said they don't expect to be working in this field in five years time, the most common reason cited was a pervasive undervaluing of the work. Many said that building understanding and educating decision makers within their organisations was taking too long (years) and that the process of transformation was too exhausting for them.

“Support for me and the tools I need to get by are handicapped by slow processes and lack of understanding of the urgency or sheer time this role takes. Often my achievements are trivialised by senior management.”

A small percentage noted that COVID-19 has led them to start looking at career transition - some due to external factors, others as a result of leadership divestment in their practice for the foreseeable future.

It is always a shame to lose talent from a field, especially, as is the case with online community specialists, when organisations need them most.

“I think in five years a whole new wave of community operators will be exposed to more exciting tech, like AR and VR, and that could change everything (including the perception of the role).”

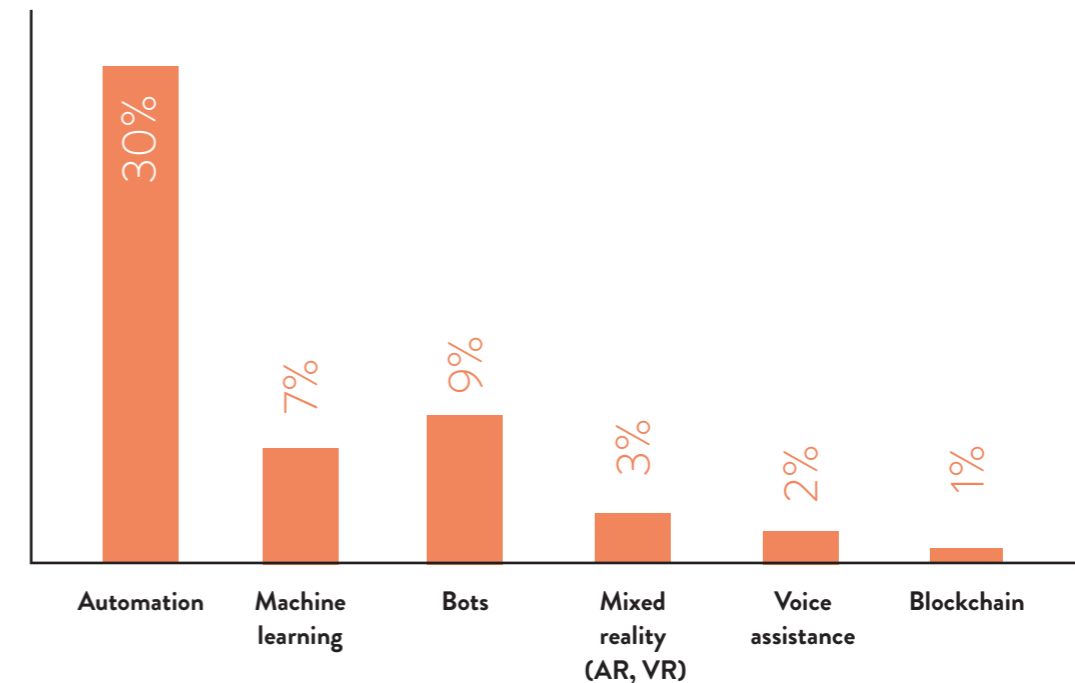


EMERGING TECHNOLOGIES

Use of machine assistance has doubled in a year.

Use of emerging technologies such as machine learning and bots is up across the board in 2020. The use of machine assistance overall (AI, machine learning and bots) has nearly doubled - from 27% in 2019 to 46% this year. Automation has surged from 19 to 30% and the use of machine learning has climbed from 2 to 7% year-on-year. Bot usage is also on the increase, up to 9% from 6% in 2019.

Mixed reality (including augmented or virtual reality) is still rarely used, though even it has crept up 2%, and voice assistance has registered its first usage in Australian online communities.

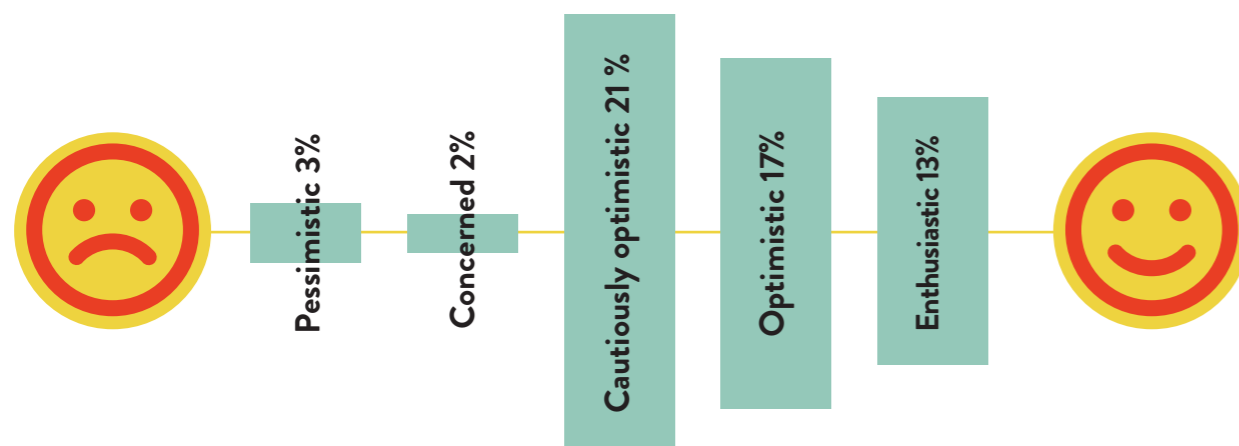


Blockchain remains largely untapped in Australian online communities, despite rich potential around its application to social currency, content exchange and community reputation systems. Perhaps if there were more start-up and technology online communities in our region it would see a corresponding increase in testing and application.

FEELINGS ABOUT THE FUTURE

We're wary of what's to come.

How do you feel about the future of community management?



Enthusiasm has dipped year on year from 21% in 2019 to 13% in 2020. This has been a difficult year for everyone and online community professionals have borne some brunt of our shared trauma online.

Those no longer enthusiastic or optimistic have had their outlook tempered, the majority shifting to a position of Cautious Optimism - up from 13 to 21% from 2019. In a volatile time, caution is understandable.

3% felt pessimistic, up fractionally from 2% from 2019. We don't believe this is a major area of concern at this stage, noting that in 2018 7% of respondents shared a pessimistic forecast.

ENTHUSIASTIC

"There are so many passionate, educated and innovative people working within our community, the future is bright!"

"My organisation is finally starting to understand the value of community and has been investing heavily in the area."

"Senior management are old timers and don't understand the platform but for the rest of us in the 'real world' digital publishing and connection to community is the main way to connect and build trust. So I'm optimistic that as older leaders fade out, new leaders will come in with more contemporary understanding. The 'cautious' in my optimism is because this process may be many years from now."

OPTIMISTIC

"As more people work remotely, the more they will rely upon virtual communities to socialise, research and work."

"Even though it's been around for decades, I feel like community as a profession is finally coming into its own. The pandemic has made a lot more people curious about what it is and how it can help."

CONCERNED

"The organisation does not understand community management and so treats the communities as channels."

"It is still a field that is generally undervalued and misunderstood."

PESSIMISTIC

"The environment is increasingly toxic, and increasingly dominated by professional trolls."

"I'm ready for a career change! We're too undervalued."

"Community online will eventually go through a backlash as people want to connect in real life."

CAUTIOUSLY OPTIMISTIC

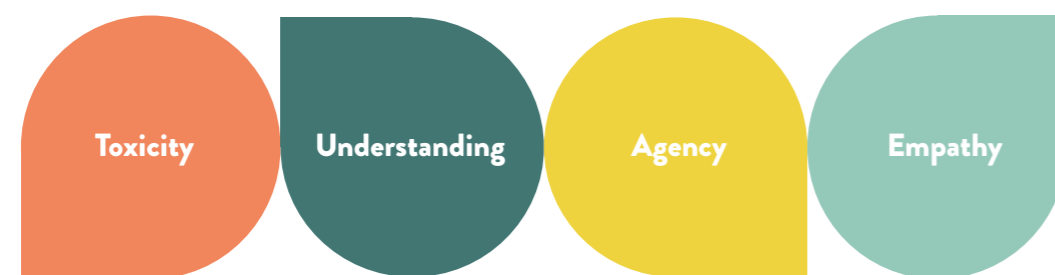
"I have been seeing more industries understand the integral role of community and I hope to see that trend continue."

"There's a huge potential for growth and importance, but organisations need to invest in resourcing to reflect the value and workload of their community and social staff to avoid burnout. Too many employers expect 'unicorns' who can do everything from graphic design to community management at an expert level for an entry level salary."

AREAS FOR IMPROVEMENT

Each year survey participants are asked what they would most like to change about community management practice to identify areas that need attention and improvement.

Responses fell into four key themes, aligned to 2018 and 2019 results:



TOXICITY

The rough edges of our internet interactions remain a core concern for community professionals and an area they'd like to change. They report being exhausted by pushing back against trolls, misinformation, conspiracy theorists, bad actors and general malcontent, while trying to steer their communities in a focused and ethical way.

Sarah Roberts⁵ and ACM member Jennifer Beckett⁶ are among the researchers who have documented the negative effects of moderator exposure to toxic content. While moderation is only part of the standard online community management role, it is a load bearing one.

“We need stronger tools to halt the negativity and trolling.”

“Ongoing support for moderators who are exposed to horrible content.”

Toxicity is a problem everywhere but is especially acute on social media where there are typically fewer controls to entry and tools to mitigate or moderate.

Community managers that work on Big Social (social media mega-platforms like Facebook) have a deep understanding that their work is intermediated by algorithms that may incentivise these toxic behaviours and content, compounding the challenge.

“We need to change the way social media platforms run (i.e. hate is prolific and drives engagement).”

“A lot of what is really successful on social platforms is unhealthy behaviour for both content-maker and community members.”

UNDERSTANDING

Community practitioners wish their work and its value was better understood by their organisations. They believe this would lead to greater buy-in around community needs and opportunities, allowing greater advancement for them and their communities.

“The confusion between community management and social media marketing and platforms. Community management must be understood and respected as a professional skill-set.”

“Even in an appreciative organisation, there often isn't a deep understanding of the importance of front-line community management roles, the agility required on an almost daily basis to respond to issues, the extra responsiveness required during times of distress (e.g. COVID, the recent bushfire season), the responsibility for upholding a brand's reputation and values, and the time required.”

“I'd like management to see the value in it, and how valuable it is in informing future products.”

This understanding gap impacts many aspects of community management practice, including our challenges in reconciling ROI and measures that may not neatly align with other fields and contexts.

“The ongoing perception that community success should be measured in the same way as other business undertakings. The pressure that CMs have to chase quantitative KPIs in a constantly changing environment is immense and unhealthy.”

“Better understanding that ROI doesn't solely need to be expressed in terms of dollars.”

Community managers believe if their work was understood more strategically and holistically, these frictions would ease and stakeholders would better accommodate nuance.

“I'd like us to be valued as the experts we are. Community is so often seen as 'frivolous' or not real work, I don't think people always understand the level of strategic thinking and expertise we bring to our roles.”

AGENCY

Disempowerment was a pervasive theme amongst respondents. They feel their work is devalued and believe they lack the power to change this. They would like more control over the systems and tools they are asked to create communities with, and like many others, they want social platforms and technology owners to take more accountability in mitigating harms their systems can generate (which they are then often responsible for repairing).

“We need better understanding that in order to have a healthy community, moderation tools and considerations have to be in at the base level or it will make everyone's life more difficult later.”

“Moderation and reporting tools on social media platforms - just having some would be nice.”

Community managers discussed the challenge of feeling overwhelmed with pressure to be 'always-on', often without adequate resources and without recognition.

⁵ Roberts, S. (2019). *Behind the Screen: Content Moderation in the Shadows of Social Media*. New Haven; London: Yale University Press. ⁶ Beckett, J. (2018) 'We need to talk about the mental health of content moderators', *The Conversation* <https://theconversation.com/we-need-to-talk-about-the-mental-health-of-content-moderators-103830>

“Would like more recognition for the work we do - and how difficult it can be.”

“I wish the organisation would listen.”

EMPATHY

Community managers would like greater empathy for the burden they carry on behalf organisations, in particular the emotional labor that accompanies building trust, moderating conflict, counselling around issues, mitigating harm and maintaining reputational integrity.

Community managers have a duty-of-care approach with participants and most take their custody of online culture very seriously. This can lead to feeling like you're put through the 'emotional ringer' thanklessly.

“I wish there was more awareness around burn-out and compassion fatigue.”

One respondent echoed many others in wanting more empathy around “the predominance of trolling and the 24/7 commitment” to managing a healthy and successful community.

“The stress that comes with moderation, especially the expectation to be always-on.”



THE NEXT STEPS

“Every organisation should have a community team.”

“Chief Community Officer should be a global position.”

We asked online community practitioners to nominate the most valuable next steps for them in the coming 12 months.

Professional development around strategy, access to resources and support in building compelling business cases for communities were the top three choices.



There is growing complexity around digital regulation globally and in Australia. In grappling with this, community managers are keen to access more training in risk and regulatory issues, while 19% say they would like a voice in policy making around digital issues.

Community managers are uniquely qualified to help governments, regulators and researchers understand the digital social landscape through lived experience, inform beneficial interventions and reliably forecast the consequences of those that may be impractical or damaging.



ABOUT AUSTRALIAN COMMUNITY MANAGERS

Australian Community Managers is the centre of excellence for online community training, resources and career development.

We are the peak membership body for people working in online communities in Australia. Our mission is to grow and enhance community management practice in our region through training, resources, mentoring and meaning-rich connection.

Launched in 2009 as the Australian Community Manager Roundtables, ACM was formed by community managers for community managers. Our members plan, build and manage online communities across industries and contexts.

As the leading voice of the online community management industry in our region, ACM consults with government, researchers and other peak bodies around online community management (including moderation and governance, digital engagement and social media platforms).



**SWARM
Conference**

Since 2011 ACM has hosted the annual conference for online community management professionals, Swarm. Swarm unites local and global community experts for an immersive program of learning, knowledge sharing and networking.

To become an ACM professional member
or learn more about our work, visit:
www.australiancommunitymanagers.com.au



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