

AUSTRALIAN
COMMUNITY
MANAGERS

STATE OF
COMMUNITY
MANAGEMENT

2021

MAJOR PARTNER

 higher logic



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About Australian Community Managers

FOREWORD

Welcome to the fifth annual career survey of practitioners of online community management in Australia and the only vocational research into online community management in the Asia Pacific region.

I'm happy to say this year's data reflects a stabilising discipline with growing salaries, and a rising economic footprint for online communities for business and organisations.

This is in the wake of another demanding year for Australian Community Managers. As Australians faced some of the longest and strictest lockdowns in the world in response to the COVID-19 pandemic, online community practitioners continued to serve those gathering remotely for work, play, commerce, peer support and much more. In many ways, their work has never been more critical.

As an organisation in 2021, ACM launched our first professional memberships; a national-first, on-demand defamation training tailored for online community or social media practitioners; and held a record number of events and training sessions for our network (on everything from managing misinformation to Australia's new Online Safety Act). In September we held our 10th annual Swarm conference, uniting online community builders and managers from around Australia and the world across a week of learning and collective problem solving.

My thanks to our partner, Higher Logic. A thriving sector and worthwhile professional opportunities need great allyship and great tools for success. Higher Logic offers both to community managers around Australia and beyond.

My deepest thanks to our founding professional members for their ongoing support of ACM, and their engagement with public policy processes, such as our consultations on the Online Safety Act, the News Media Bargaining Code, NSW Defamation Review and our contribution to the MEAA/Gender Victoria Moderation Guidelines. ACM is striving to represent member interests in these important public debates, to ensure that the profession is better understood, recognised and supported in its work.

Venessa Paech

Director, Australian Community Managers



FOREWORD

I am very excited to see Community Managers' value recognised through better salaries.

Our own research results published in the 2022 Community Predictions eBook, [<https://pages.vanillaforums.com/ebook-community-predictions-2022>] support the contention that Community is the new normal. Creating and forging new career paths within the Community Management organisation, from leadership to marketing and operations, is the way genuine value is created and success is achieved.

Community as an integral part of the Centres of Excellence within organisations and have it guide practices across the organisation, members, and customers. Community is proving the foundation for so many imperatives including customer support; online accessibility; and, community-led hybrid events.

Though Covid-19 has negatively impacted us all in so many ways, the silver lining is that community valuation has been expedited and as a professional community there is so much to be grateful for. The pandemic, despite all the damage it has caused, can be thanked for some things; being a catalyst to prove the value of the community professional's work is one of them.

And here is the challenge in 2022 and beyond for Community Management. How do communities provide an authentic customer experience when AI and automation bring their influence to the table?

These and many other questions are what this community of community management is fueled by, and Higher Logic is highly supportive of Australian Community Managers' stewardship of this work.

Robert Barnes

Country Manager – APAC, Higher Logic



RESEARCH BACKGROUND & PURPOSE

The 2021 ACM State of Community Management report addresses:

- The demographics of Australian online community managers
- Their working conditions and contexts
- 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 on communities and their management in region

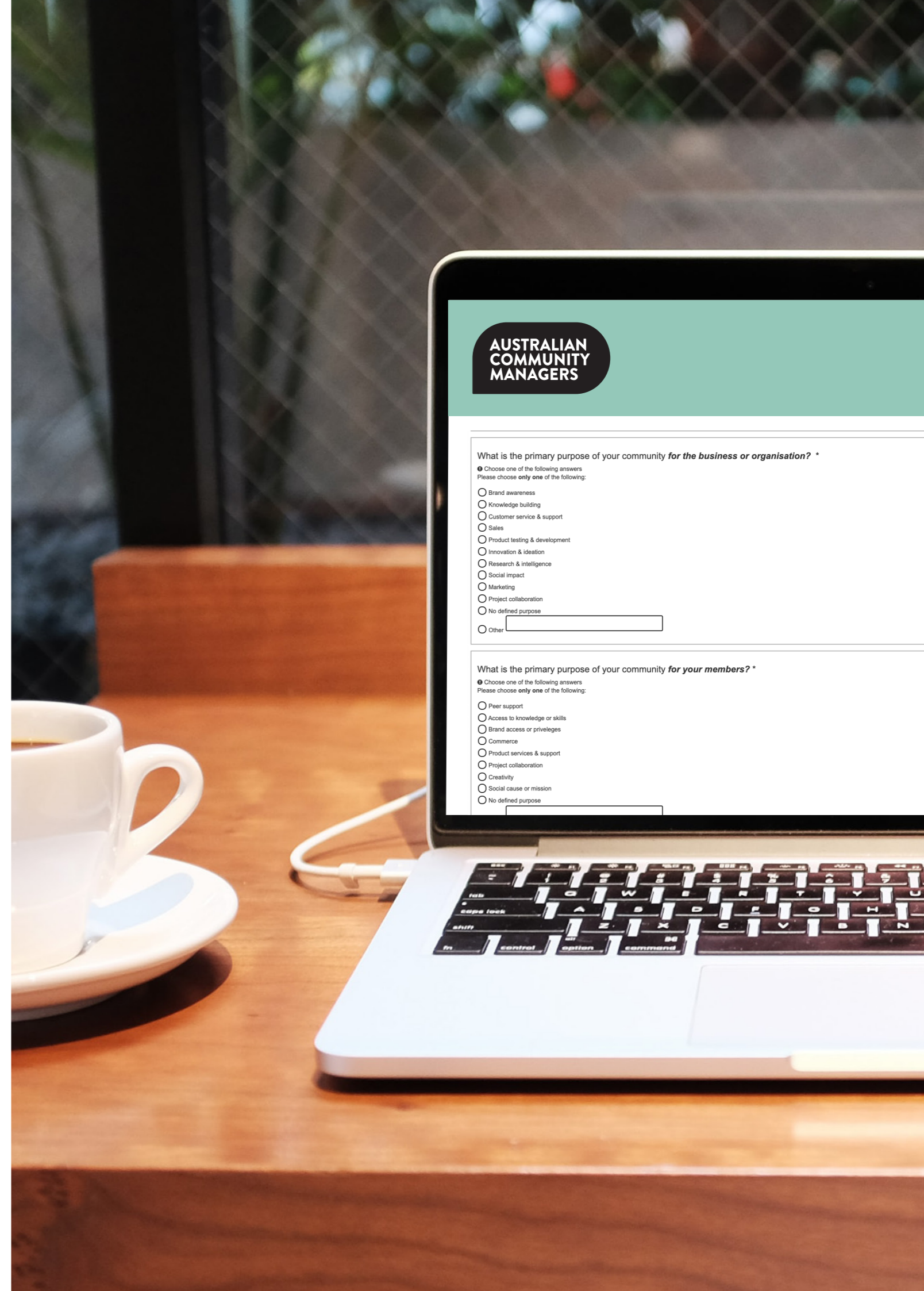
The annual ACM Survey is the only benchmarking data captured about online community professionals in the APAC region. The survey is a resource for community managers (both professional and volunteer), recruiters and employers, journalists and media, policy makers, researchers and anyone looking to improve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

Methodology

This survey was conducted online from September 15 2021 until November 15 2021, and was designed to take approximately 15 minutes to complete. There were 123 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 56 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, and this year focused on COVID19 responses. 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

Community professionals' average salary has risen to **\$100–\$130k p.a.**

27%

of community practitioners want formal accreditation for their work

62%

of community professionals now work for a single business or organisation

95%

of community managers invest in learning

Online community managers are **61% female** and **50% European** (English)

Knowledge building or sharing is the leading purpose for online communities



54% of online communities in Australia have fewer than 10,000 members

\$5m

3% of online communities that make money are generating more than \$5m annually for their organisations

34%

of online community practitioners say their role is valued and understood



63%

of community professionals are tertiary qualified

41%

are optimistic about the future of community management



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



85% of community managers conduct post-moderation and reactive moderation in their communities

30%

have struggled with their health and wellbeing as a result of the pandemic

30%

of community managers report an increase in workload due to the pandemic



51%

of community practitioners work outside a traditional office



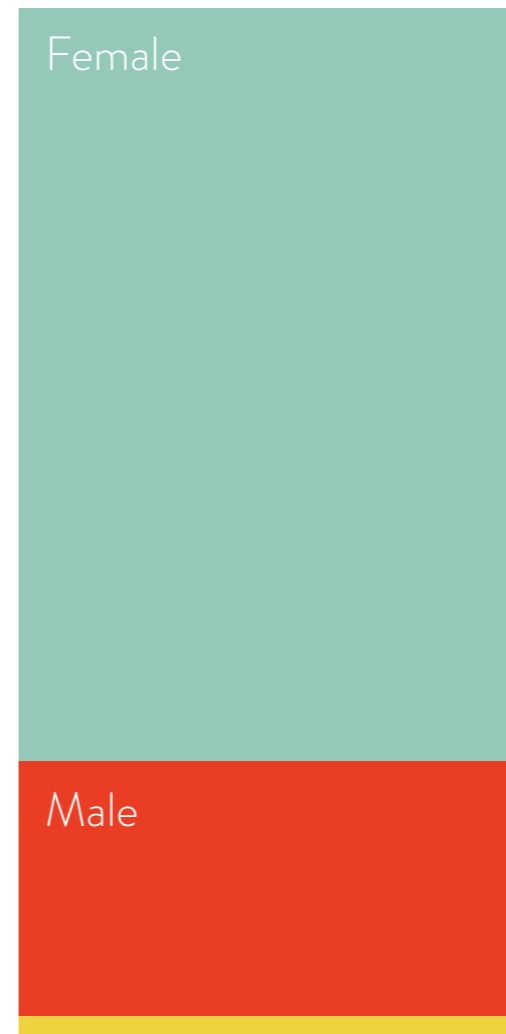
48%

of community practitioners are working with AI and automation in their practice

DEMOGRAPHICS: WHO IS MANAGING YOUR COMMUNITIES?

GENDER

Women dominate, but the gender gap is closing.

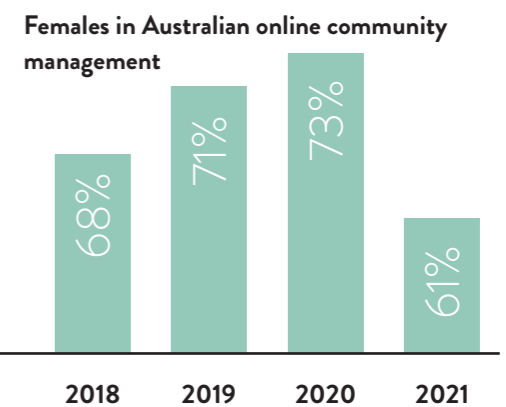


Female 61%, Male 21%, Non-conforming 2%

Online community management continues to be a female dominated profession in Australia, however the gender gap shows signs of closing.

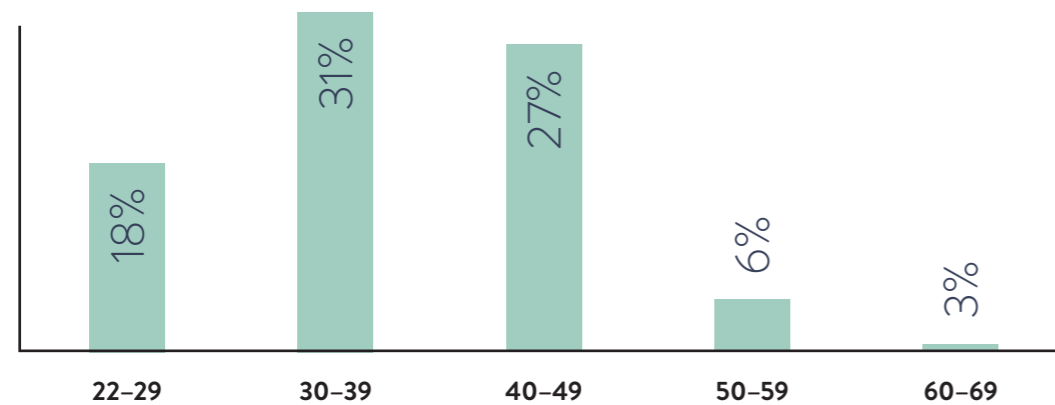
61% of respondents identify as female, down somewhat from previous years (73% in 2020). There are many reasons women report being drawn to community management as a profession. They include: preferences for humanistic work, an opportunity to improve the online experience of others, and engaging in digital work that has social impacts.

In line with 2020, 2% of respondents identified as gender non-conforming. We recognise that comfort and safety levels vary around disclosure of gender identification, and this may influence these results.



AGE

Community management is a maturing occupation.



There has been a step-change in the age distribution of online community management in Australia. Since 2015, the space has been dominated by practitioners aged 22–39. While this group is still prevalent, practitioners aged 40–45 have increased from 15% to 27% year-on-year.

In 2020 this report recorded its first practitioners aged between 60 and 69 (1%). In 2021 this has risen to 3% of respondents; again reflecting a maturing of the profession.

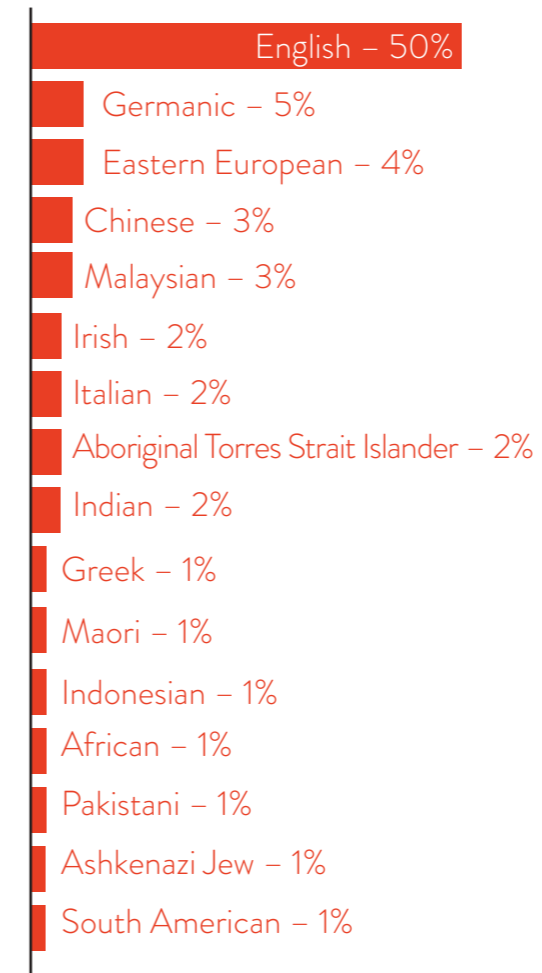
There is still a relatively undeveloped career trajectory for community professionals in

Australia, with roles most commonly hitting a ceiling at department head (e.g. Head of Community). This means limited options for community experts who wish to remain in the discipline.

Organisations who aren't able to offer a pathway to senior or executive leadership risk losing community talent to the world of consultancy, or international markets where Chief Community Officer (CCO) roles are increasingly common. As distributed and remote work becomes the norm, this potential brain drain is a rising threat for Australian organisations.

ANCESTRY

The custodians of online communities in Australia are 50% European (English).



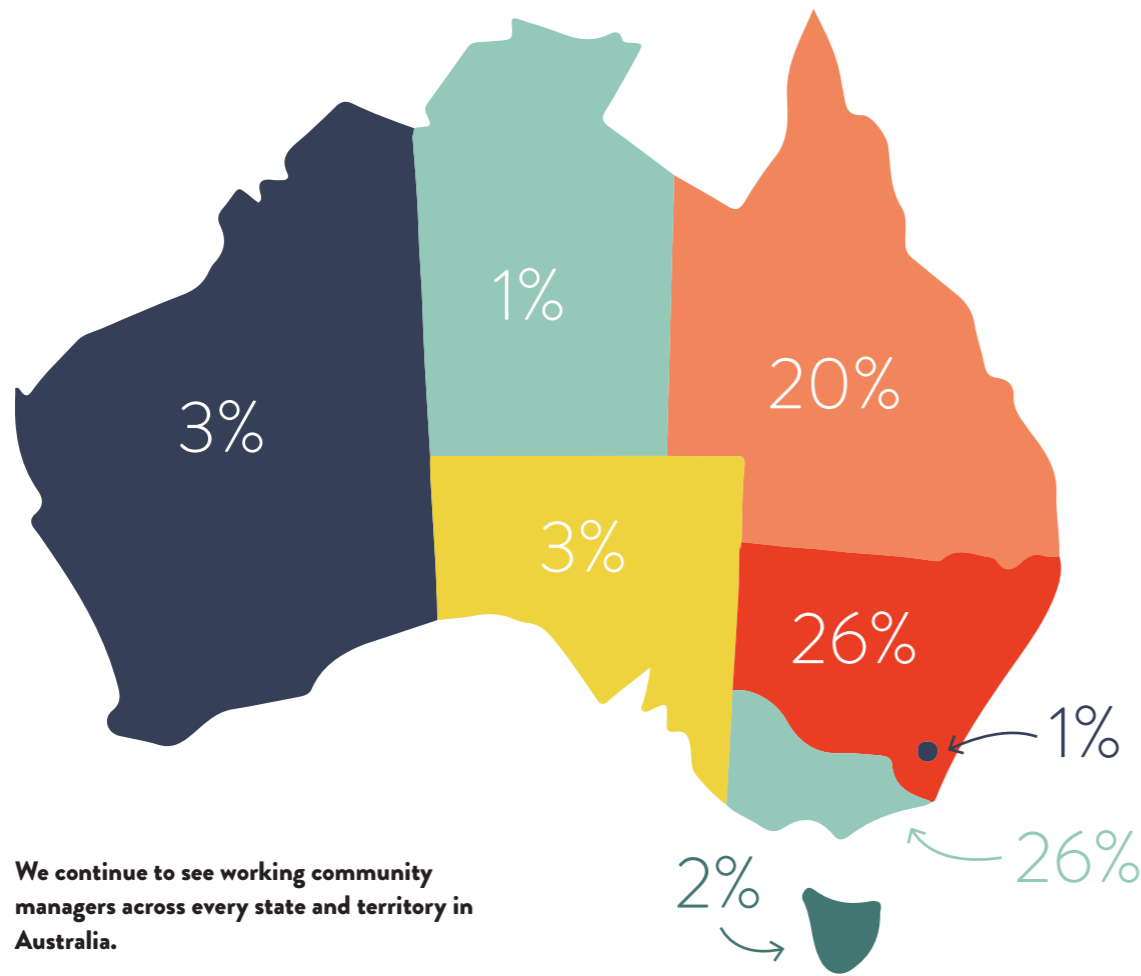
This is the second year the ACM Survey included a question on ancestry and cultural identity as optional. As an organisation we are committed to ethical data collection and resist unnecessary capture of identifying characteristics wherever possible. Commencing in 2020 we felt it was important to collect this information, so we can form a critical perspective on the cultural diversity of backgrounds and perspectives of those managing Australian communities and, over time, how this might impact the effective management of those communities.

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 remains predominantly white and of European ancestry. 2% of online community professionals identifying as Aboriginal Torres Strait Islander.

The ethnic or cultural background of a community practitioner may seem irrelevant at times, but in reality, it can influence our understanding of the concept of community, our ability to empathise and engage our members, and our approach to governing inclusive spaces, among other factors.

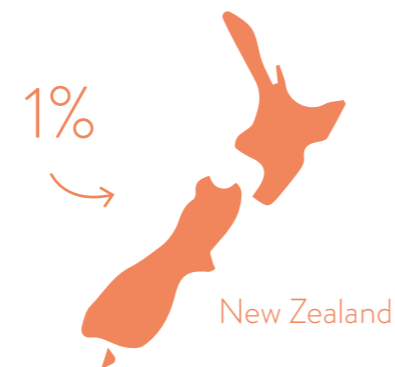
LOCATION



We continue to see working community managers across every state and territory in Australia.

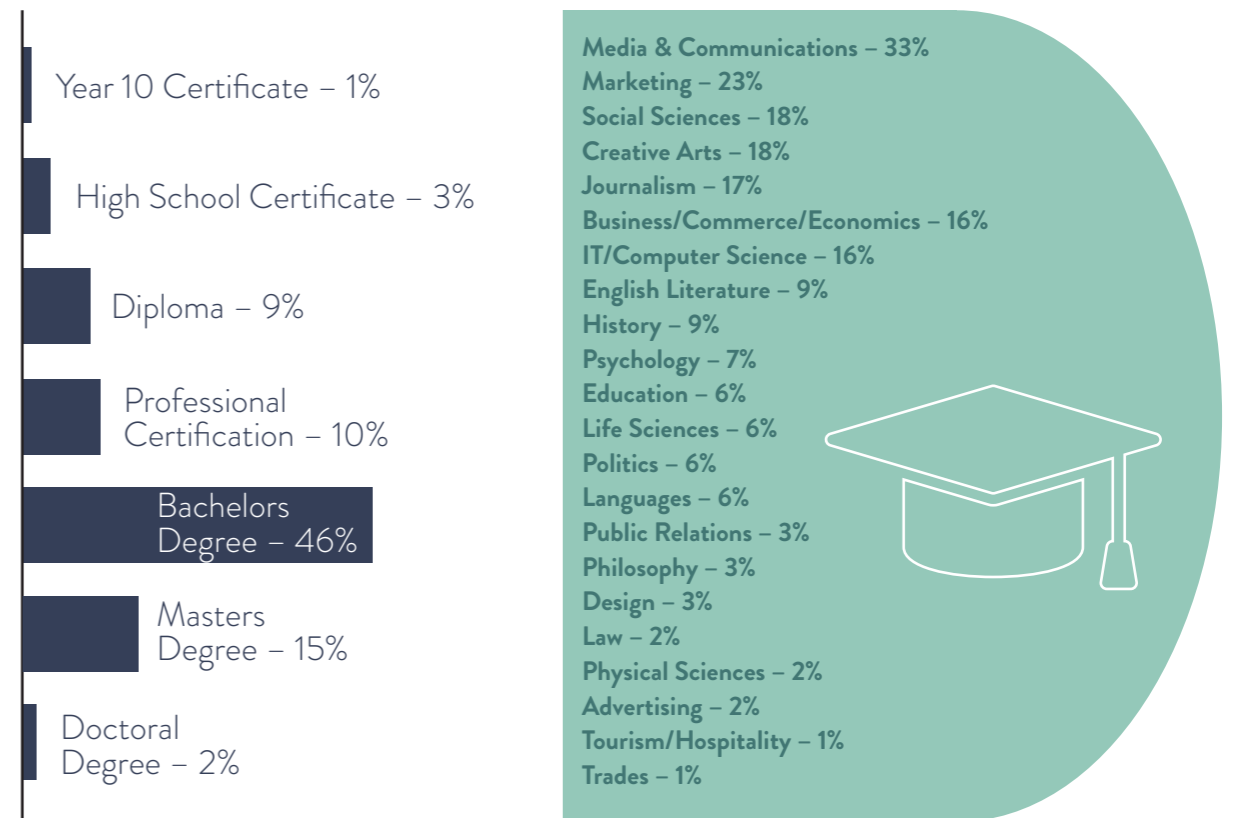
Victoria remains the centre of online community management nationally, closely followed by New South Wales. Most states and territories reflect a similar distribution of workers to previous reports, however Queensland has seen a notable jump in representation (from 9% in 2020 to 20% in 2021).

Geography is generally irrelevant to online community management, especially in a post-COVID, hybrid working world. However, like their international peers, Australian community professionals often connect and support one another at a local level, and this local sense of community expertise remains important.



EDUCATION & TRAINING

63% of community professionals are tertiary qualified.



The educational background and experiences of Australian online community professionals remains relatively consistent with previous years.

There has been a small decrease in the number who are tertiary qualified (75% in 2020 to 63%). Community practitioners are typically university graduates of at least a Bachelor's level.

USEFULNESS OF EDUCATION

Most respondents found their formal education 'somewhat useful' in their community practice – 47% (on par with 2020 and 2019 data). There was a small decrease in those who found their formal education 'very useful' – from 21% in 2020 to 17%.

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

Of those who completed tertiary education, the most relevant qualification was a Master's Degree (91% of respondents who held a Master's said it was 'very useful').

22%
Not very useful

47%
Somewhat useful

17%
Very useful

ONGOING LEARNING & PROFESSIONAL DEVELOPMENT

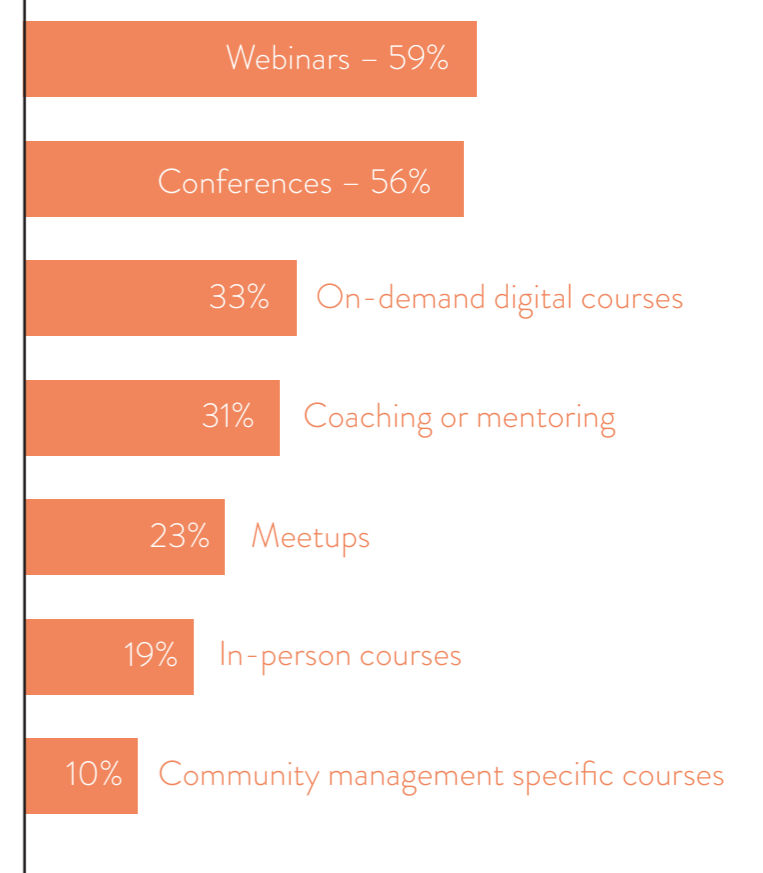
95% of community managers invest in learning.

95% of total community managers take-up some kind of ongoing learning or professional development. The changing digital and regulatory landscapes impacting their work are the driving forces behind this (e.g. the Australian Online Safety Act 2021¹, the Voller defamation rulings²).

Webinars and conferences (such as Swarm) remain the most popular sources of this learning (59% and 56% respectively), with on-demand digital courses and coaching/mentoring each seeing small increases year-on-year.

Community practitioners report that the flexibility of modular and on-demand offerings are invaluable, as they often require opportunistic training or development that can be completed around busy schedules.

10% 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 - doubling from 5% in 2020. These intensives are the only explicit university level online community management training in the country and seem poised to grow.



¹ <https://www.legislation.gov.au/Details/C2021A00076>

² https://www.hcourt.gov.au/cases/case_s236-2020

TENURE

46% have been working in community 5+ years

For the first time in 2020, the discipline recorded a majority of Australian online community practitioners working in the field for more than five years (46%). This trend has continued in 2021, with 46% again reporting 5 years or more as their tenure. Notably, those working in the field from 5 to 7 years rose from 17% to 20% year-on-year.

There has been an increase in newcomers working in the field less than five years - from 39% in 2020 to 41% in 2021. We polled those new to community management to understand how they arrived here:

- 63% report making a career change from something else
- 22% took up community management in addition to other roles/work
- 15% are new graduates entering the professional marketplace

We also see a small increase in community practitioners who've been in this space for more than a decade; from 9% to 12% year-on-year.

We would expect that increase opportunities for more senior community professionals will keep them in the discipline longer, and offer the ability to specialise in areas like community design, community operations and community analytics.



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

Community professional salaries are growing.

The average salary for community managers in Australia has stepped up a level and is now between \$100,000 and \$130,000 annually.

Since 2015, community salaries have averaged between \$71,000 and \$100,000 (in 2020 41% fell into this category).

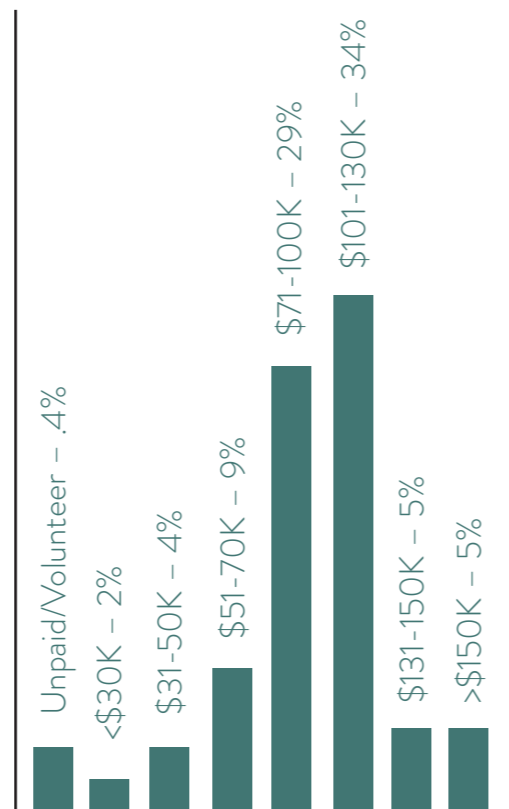
There has been a further decrease in those making \$51,000 to \$70,000 per annum - from 11% in 2020 to 9% in 2021, and the number of community practitioners making under \$30,000 annually is at its lowest level since this survey commenced in 2015.

The number of community professionals making between \$131,000 and \$150,000, and over \$150,000 has also increased incrementally.

The highest paying sectors for online community professionals are: Health, Government and Technology. This is consistent with 2020 data and reflects in part, the greater degree of regulatory and moderation considerations for health and government communities.

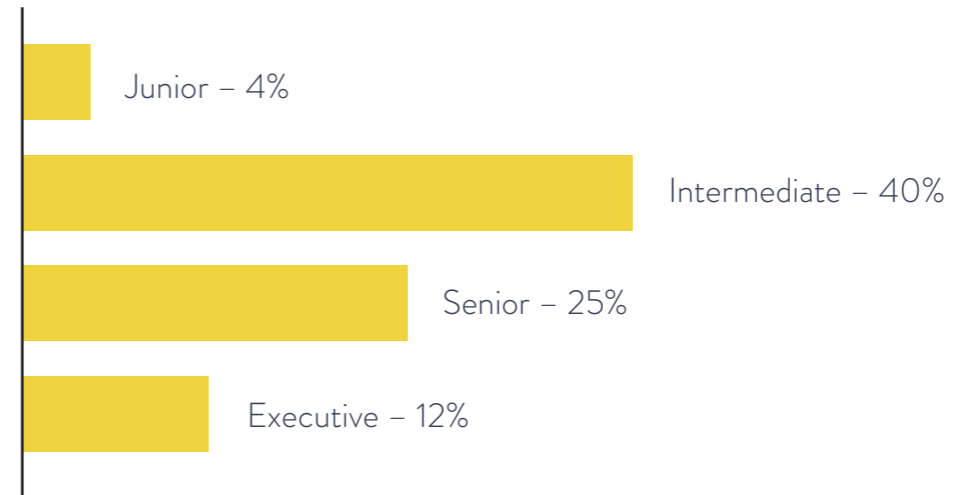
It is worth noting that the small number of communities generating the most revenue for organisations as a whole, fall in the Fast-moving consumer goods (FMCG) sector, and pay their community staff at an according level.

There are more community managers reporting working in an unpaid capacity (up from 0.4% in 2020 to 4% this year). Verbatims suggest this is in part due to the growth of new communities emerging during COVID offering diverse forms of social support, and the humans stepping up to manage those without compensation.



This annual survey is open to anyone managing communities online in Australia, and we recognise we are only capturing a fraction of the unpaid community management that occurs. We aim to address this in the future through more specific research that can adequately reflect this digital social care, and its relationship to professional online community management practice. Many professional community managers support other communities for free in their own time, just as some community managers elect to work for alternative compensation indefinitely and pursue other primary income.

POSITION & TITLE



Distribution of seniority amongst community professionals is relatively consistent with 2020 findings, with most holding intermediate or senior roles within their organisations.

There has been a small increase in intermediate roles (36% to 40%) and an equivalent reduction in junior roles (from 8% to 4%).

We asked people to name their job title - 75 different titles were shared

44% of titles shared had the word 'community' in them, significantly up on 2020 respondent data (21%).

Sadly, confusion persists between the otherwise distinct roles of Social Media Managers and Community Managers. The former are more accurately described as Audience or Engagement Managers, often with objectives around reach, amplification and conversion. Community Managers are focused on relationship and culture building, and are more concerned with relevance over reach, and

shared value generation. Practitioners working actively in the space report frustrations over this confusion, and newcomers to the job market can find it hard to navigate the ambiguity.

The two practices do have complementarity, but require discrete skills, are measured differently, and generate different outcomes for an organisation. Evidence of the role confusion in the Australian job ad market remains an impediment to community practice growth and maturation.

In 2020 ACM released job descriptions and interview question templates to aid employers and recruiters in understanding the specifics of community management. These have been received well and we will continue to invest in resources to support clarity around these different specialities.

Here are some of the titles respondents named

**Community
Manager**

*Customer
Community
Specialist*

FORUM MANAGER

Head of Community

SOCIAL MEDIA MANAGER

Community Lead

Engagement Officer

*Social
Engagement
Specialist*

**HEAD OF
SOCIAL AND
COMMUNITY**

Moderator

Communications Manager

Digital Communications Specialist

Online Community
Manager

DIRECTOR OF COMMUNITY

WORKING STATUS

Are agencies on the wane?

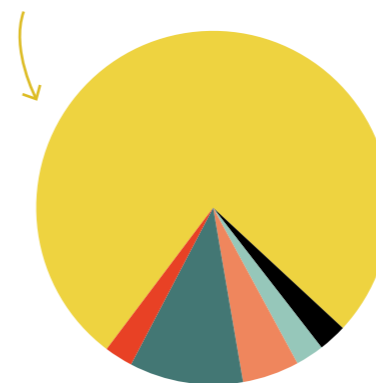
Community management can be conducted by in-house professionals, agencies or individual freelancers. There are advantages and disadvantages to each approach, but, providing the calibre of expertise is sound (and the community managers enjoy fair pay and conditions) each is an entirely viable way to support an online community.

In the wake of new regulatory requirements for community management practice, and a growing pipeline of talent being trained in this field, it appears that fewer organisations are opting to outsource their community management to an agency - especially one that supports numerous communities across multiple clients.

Agency representation is down significantly this year - from 14% in 2020 to 4% in 2021. Notably, the number of agencies working on multiple communities has shrunk from 11% to 2%. 62% of community professionals work for a single business or organisation (up from 59% in 2020), and 48% of those are employed full-time by that organisation.

Consultancy continues to rise slowly - from 8% in 2020 to 12% in 2021, and freelancing has fallen again year-on-year, now down to only 2% of the market.

In-house working for single business/org 59%



Agency working on single business/org 2%
Consulting/Consultancy for multiple clients 8%
Consulting/Consultancy for single client 4%
Freelance working for multiple clients 2%
Agency working on multiple clients 2%

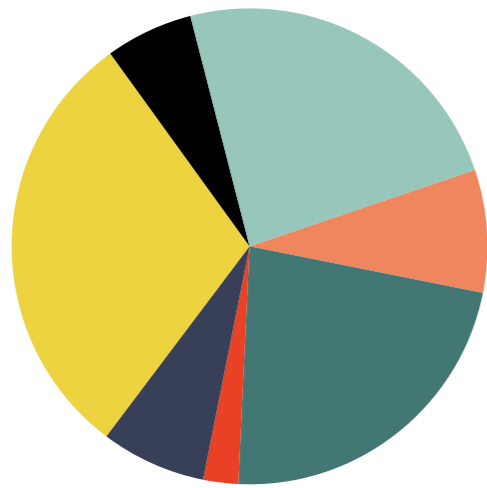
Working Status Data 2021 vs (2020)

Employed full-time (single org) - 48% (52%)
Employed full-time (multiple clients) - 2% (5%)
Employed part-time (single org) - 11% (8%)
Employed part-time (multiple clients) - 1% (8%)
Employed casually (single org) - 0% (3%)
Employed casually (multiple clients) - 1% (2%)
Own business (employees) - 4% (3%)
Own business (solo/freelance) - 4% (7%)
Volunteer (single org) - 2% (0.5%)
Volunteer (multiple clients) - .2% (0.5%)

TEAM MAKE-UP

Teamwork on the rise.

As with all previous ACM Surveys, the majority of community professionals in Australia work in small teams focused on community. The number of community practitioners working alone with their community has reduced year-on-year – from 30% down to 20% – suggesting small teams are on the rise.



In a small professional team 25%
In a small volunteer team 5%
I'm the only one (professional) 20%
I'm the only one (volunteer) 7%
Manage a small professional team 19%
Manage a small volunteer team 2%
Manage a large professional team 6%
Manage a large volunteer team 0%

The number of community professionals managing a team has also increased year-on-year from 19% in 2020 to 25% in 2021.

To better capture the diversity of team composition in relation to compensation, this year we asked respondents to classify whether they and their teams were paid or volunteer.

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

We asked respondents who worked on or managed a team to tell us where they were located. The results show teams are more distributed.

Community managers working on internationally distributed teams have risen from 14% to 17%, while nationally distributed teams have risen from 12% to 19%.

- Distributed globally 17% (14%)
- Distributed nationally 19% (12%)
- Same location as you 24% (29%)

THIRD PARTY ROLES

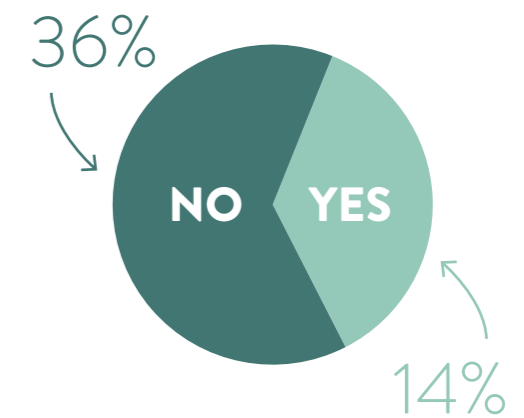
Likely in the wake of enhanced regulatory pressures, there has been an increase small spike in the percentage of community practitioners working with external consultants or agencies on moderation (from 3% to 8% year-on-year).

We believe this is primarily consultative support to help prepare for responsibilities pertaining to the Voller decision and the new Online Safety Act 2021. This ratio is still quite low, however, and we expect it will increase next year as the full impacts of the Online Safety Act are observed and understood.

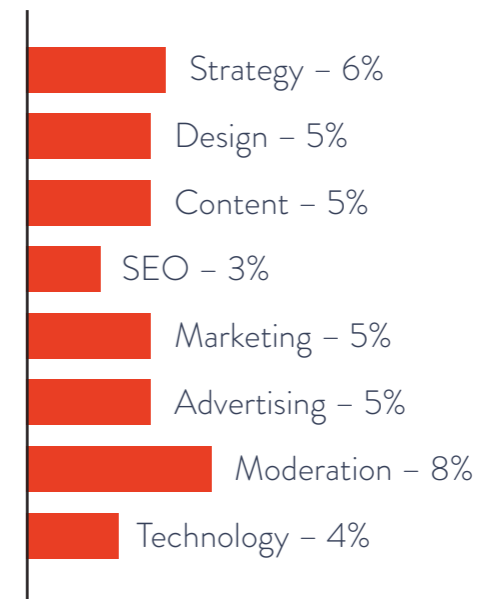
There was also a small increase in those obtaining technology support or consultation. Verbatims suggest this is in part due to consultation around platform choice and migration, in light of the Facebook news ban in early 2021 and the leaked Facebook papers later in the year.

Most numbers were static or saw a small decrease, in line with overall agency decline.

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



What areas do third parties work on?



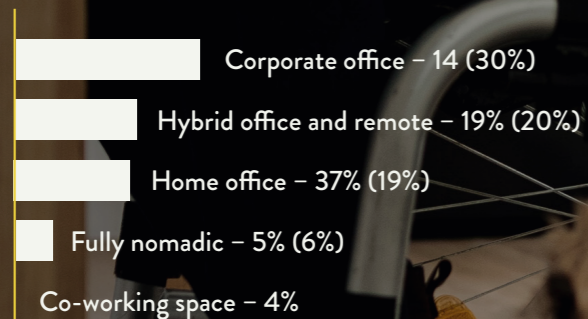
ENVIRONMENT

Most community professionals work from home.

51% of community practitioners work outside a traditional office – a figure up once again year-on-year (from 49% in 2020 and 37% in 2019).

This percentage has steadily climbed in the past four years and shows no sign of waning. Meanwhile the number working in corporate environments has halved year-on-year.

Working-from-home is now the dominant setting for community professionals in Australia. While online community managers worked in distributed contexts long before the pandemic, they are continuing to lead the way in this new normal.



NUMBER OF COMMUNITIES

Approximately 10% of community managers work on more than one community at a time.

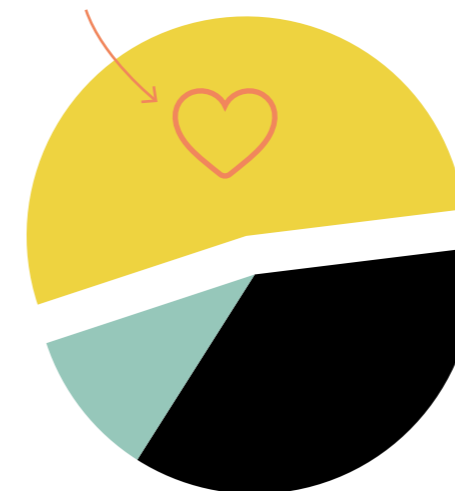
The majority work on one primary community (with multiple sub-groups). 1% of respondents said they worked on three to five communities.

One respondent reported working on 37 communities (via an agency role). This type of community management, even while

working as part of a larger team, is generally inadvisable. While it is certainly possible to serve multiple communities, the practice requires a certain level of attentiveness and consistency that this type of work sprawl makes difficult.

VALUE & UNDERSTANDING

My role is understood and valued 34% (24%)



My role is partly understood and somewhat valued 23%

My role is not well understood and not valued 7%

Community management is more understood.

The pandemic seems to have provided long-needed momentum to help practitioners build respect for, and understanding about, online community management. For the second year in a row, there has been an increase in the number of community practitioners reporting their work as understood and valued. The needle has moved significantly – from 24% in 2020 to 34% in 2021.

In 2019 only 2% of community managers said they felt their role was understood and valued.

These insights speak to the sector's burgeoning professionalisation and the growing capacity of community practitioners to capture and articulate the value their work brings.

KEY CHALLENGES

ROI and mental health leading issues.

The leading challenges for community managers are communicating return on investment (ROI), maintaining their own mental health and wellbeing, measuring success and undertaking stakeholder education.

ROI still tops the list of issues raised by respondents, however this has fallen sharply year-on-year (32% to 23%).

Comments reveal practitioners are growing their confidence in measuring efforts and outcomes, though they still face issues with analytics tools and explaining their achievements/work to stakeholders.

“Our business data and analytics are primitive so it’s difficult to measure true ROI.”

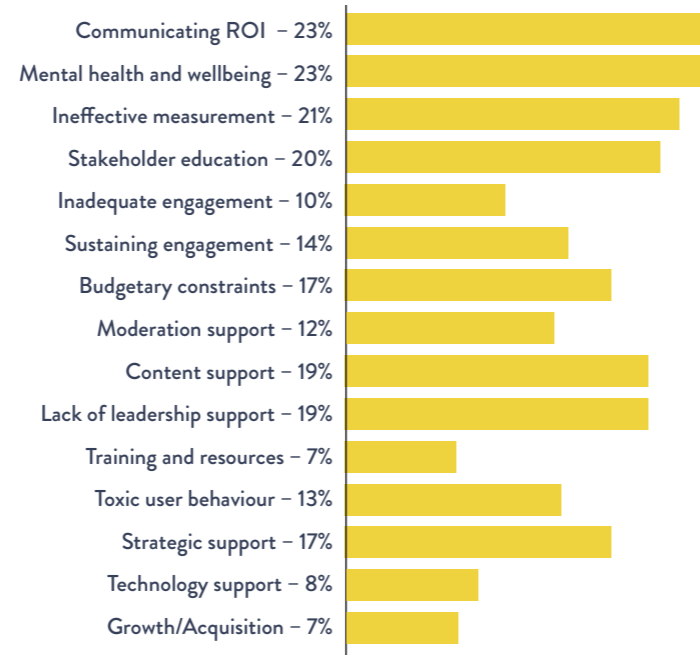
“It can cost a lot to get the right tools to measure ROI and the business doesn’t want to invest - ironically.”

“We’re on Facebook Groups and there are limited tools available given API restrictions, so we’re stuck with native metrics and a lot of manual work.”

“I know what to measure, but management doesn’t want to hear about the metrics that have real impact.”

Having to deal with lack of support and resources is a common theme in responses, with community practitioners frustrated they can’t get the traction they know is possible with their community.

“It’s difficult to get community integration work prioritised in an environment where there are many enormous projects competing or scarce resources.”



Self-care remains a real concern, with respondents still reporting negative impacts around the emotional toll of their work. Though the percentage reporting this problem has fallen slightly, we’d like it to reduce much more.

“Definitely seeing an increase in mental health challenges for those moderating large public communities on social media.”

“Being exposed to bigotry is exhausting.”

ACM has worked hard through 2019 and 2020 to increase the amount and quality of training and resources available to community practitioners in our region. We are encouraged by the drop, from 20% to 7%, in the percentage of respondents citing lack of these assets as a major challenge in their work.

KEY BENEFITS

Community professionals are impact driven.

We asked community practitioners to tell us what they most like about their work. Their responses fell into the following four themes:



Community professionals in Australia are driven by making a difference – to their organisations, to their members, and to the internet as a whole. They are aware of the power they hold as cultural mediators, and celebrate the value of community as a transformative experience which can achieve different objectives.

They love the diverse ways that community management offers them a chance to do good work and to thrive when solving problems for stakeholders.

The survey recorded many comments about these opportunities to effect positive change:

A Better Internet

“People power!”

“I feel like I make the internet better in my own way.”

“I like to help create that sense of belonging and empowerment that gives people a safe space they don't have otherwise.”

“Creating positive and useful spaces on the internet.”

“Being able to shape conversations and social interactions towards a positive culture – helping address toxic behaviour.”

“Showing the power of community to improve things.”



Impact

“Helping the members of my community is everything.”

“Interacting with enthusiastic and invested members; passing on genuine benefits to members.”

“An opportunity to be creative and make a difference beyond the sales targets of our brand.”

“I love contributing to social well-being and change.”

“Hearing stories of lives changed by our organisation.”

“I am really passionate about improving user experience. I think community management is a fantastic career when you are well supported.”

“Making connections with community members and witnessing the power of those connections and community support to create meaningful change.”



Diversity

“I enjoy the broadness of it and the requirement to think on your toes!”

“Engaging with people from different perspectives and lived experiences than myself, facilitating access to knowledge that would otherwise be difficult for them to access.”

“There is so much scope within the work. So much variation depending on the type of community and org you work in. The work is constantly different and fulfilling.”

“The fact every day is different, working with a dynamic group of diverse members.”



Problem Solving

“I really enjoy talking to people, figuring out what they need and helping others solve their problems.”

“Being able to help solve problems for members is super rewarding.”

“Using community as a solution to problems is a fulfilling way to spend my time.”

“I love connecting people to the things that matter most to them and seeing collaborations evolve to address different problems and issues that would never have been possible otherwise.”

“Bringing the organisation and people together and being the voice for both.”



ABOUT OUR COMMUNITIES

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

STRATEGY

Communities are becoming more strategically focused.

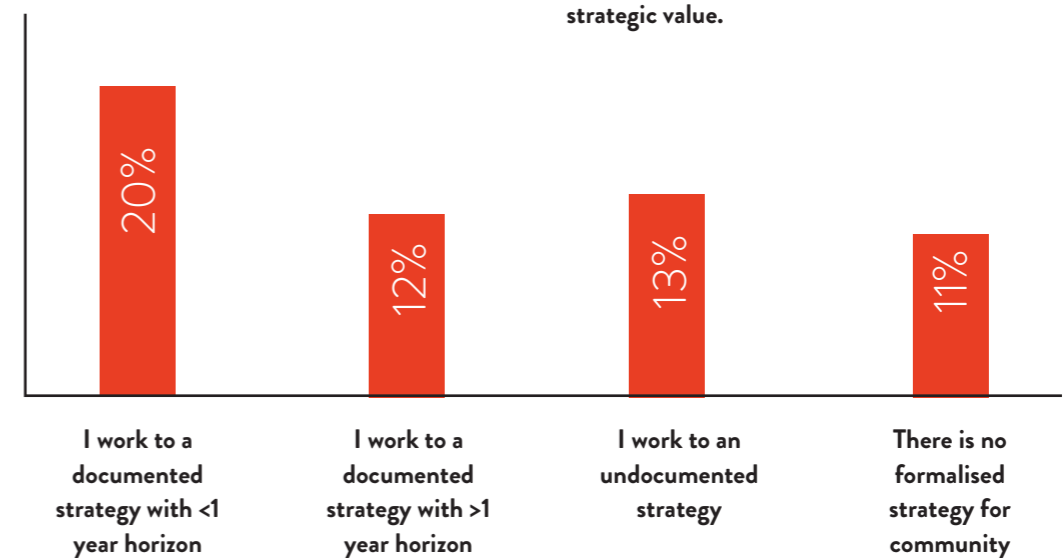
45% of community managers report working to a strategy, though only 32% have this documented. This on par with 2020. 11% report not working to any strategic plan, down from 15% in 2020.

While there is an organic aspect to community development (and some communities emerge organically), having a clear strategy to sustain a community and ensure it delivers shared value is important.

For communities operating in commercial contexts, it is imperative. Community management tactics evolve over time, based on how well the community is tracking against strategic objectives.



The percentages of undocumented or absent strategic plans likely correspond with the low number of senior community roles in Australia. While community managers frequently work strategically, they may not be in a position of influence within their organisations (or with clients) to paint a bigger picture and articulate strategic value.

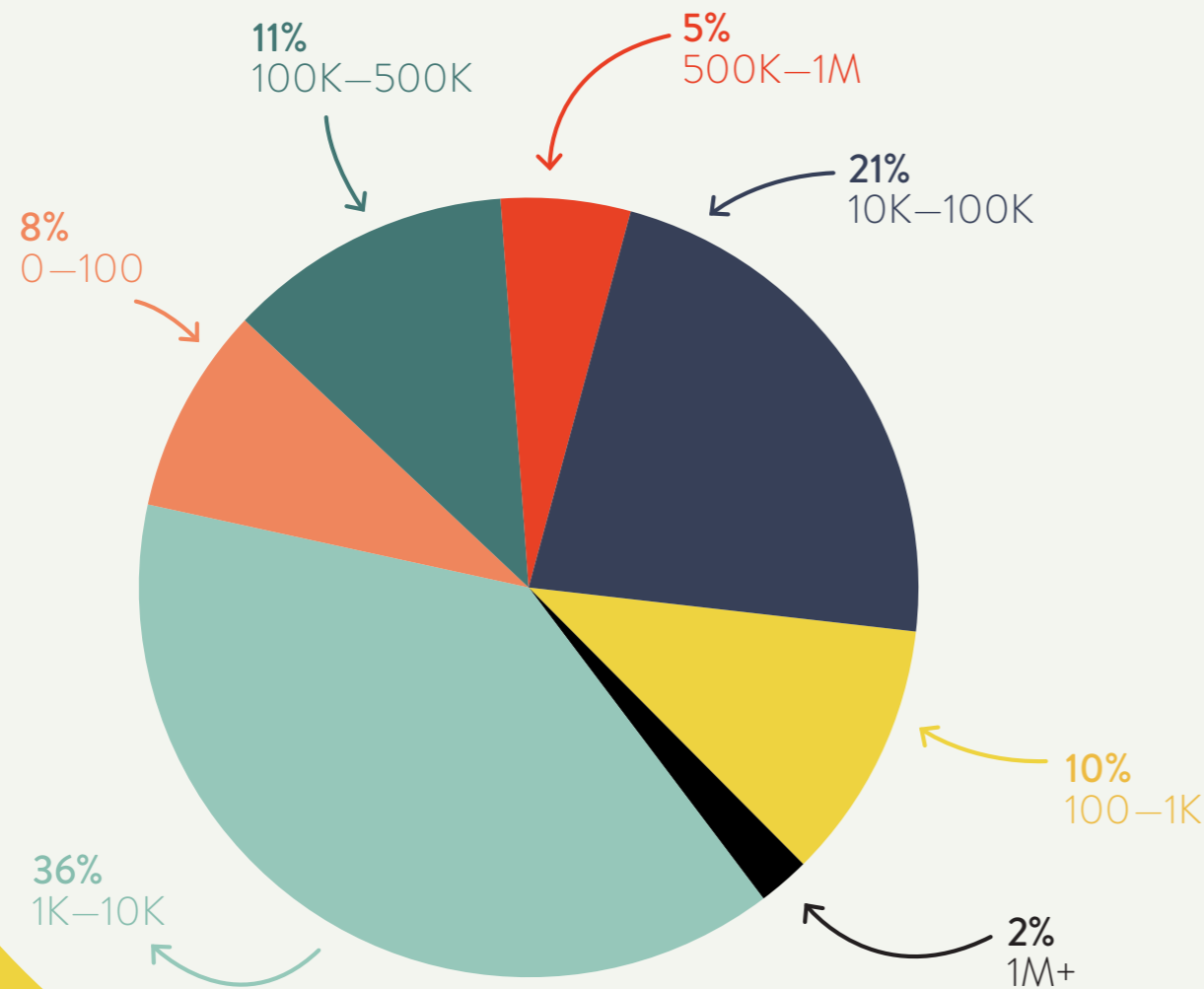


SIZE

Large communities are rare

54% of managed online communities in Australia have fewer than 10,000 members, while 38% have more than 10,000. 2% have more than 1 million members in their ranks.

15% of respondents reported that they weren't sure of their membership numbers and hadn't obtained a recent count or analysis.



PURPOSE

The top three organisational purposes for online communities in Australia are: knowledge building/sharing, brand loyalty and customer support.

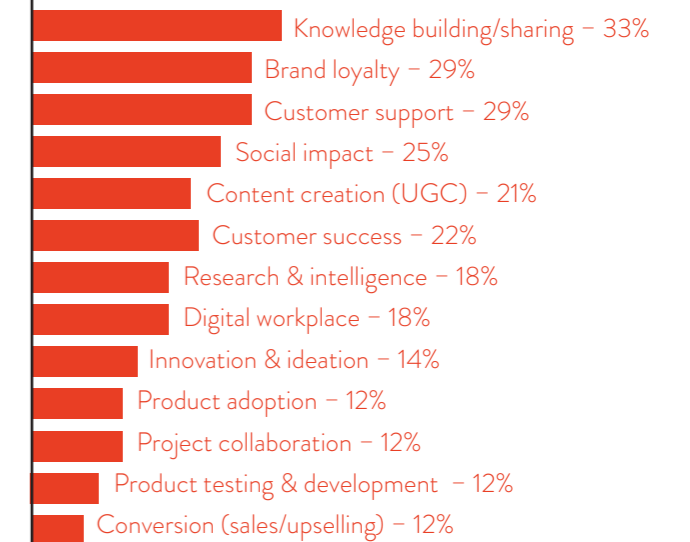
Social impact, content co-creation and customer success are also popular reasons driving strategic community for organisations.

Australia has lagged behind other regions in leveraging online communities for business or organisational innovation and ideation. These functions have consistently scored low in this annual research. In 2020 there were signs of an upturn, and this has continued in 2021 – innovation and ideation now stands at 14% (up from 9% in 2020 and 1% prior). The percentage of organisations using online communities for research and intelligence has increased from 13% to 18%. There has also been an increase in the use of community for project collaboration and product testing, up 7% and 3% from 2020.

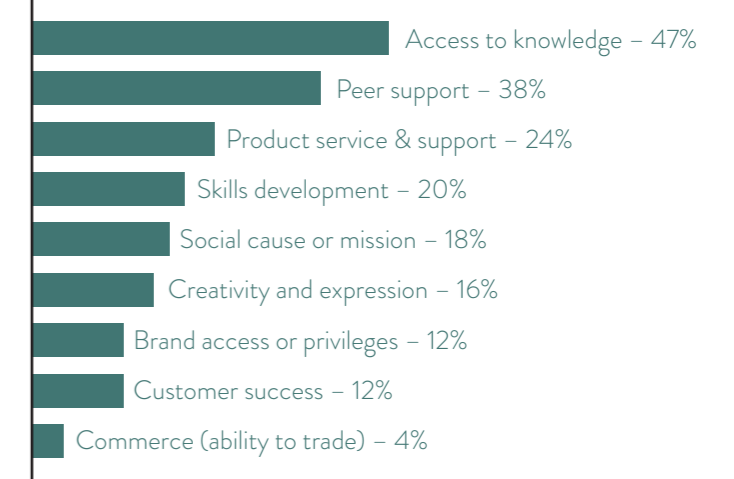
Access to knowledge or skills is the leading driver for members accessing Australian online communities canvassed in this survey. This purpose also led the pack in 2020, but has jumped considerably year-on-year (from 30% to 47%).

Peer support is the second most popular purpose for members, up year-on-year, from 22% in 2020 to 38% in 2021.

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



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



PLATFORMS

Social media use is plateauing

We asked community managers which platforms they use to build and maintain their communities. Choice of platform may not be in a community professionals' control – especially if their role is more junior.

Social media platforms like Facebook still dominate the community space in Australia, however there are more owned platforms entering the market and growing their footprint.

The leading dedicated community platforms are **Higher Logic (including Vanilla), Discourse and Salesforce (Lightning Communities)**.

Mighty Networks has grown year-on-year, while Khoros has lost a small portion of its market share (down from 6% to 4%). Australian community platform start-up Trybz has entered the market (2%).

In social media, TikTok usage has soared in 2021 – from 3% in 2020 to 24% this year, while Facebook usage across various products is consistent year-on-year.

Which platform does your community use?

Owned	Social Media	Enterprise
Email	30% Facebook - Instagram	31% Zoom
Higher Logic (Vanilla)	17% Facebook - Groups	29% Slack
Discourse	12% Facebook - Pages	28% Facebook - Workplace
Salesforce	8% Twitter	24% Microsoft Teams
Mighty Networks	5% Tiktok	24% Yammer
Khoros	4% YouTube	18% Workvivo
Custom built platform	3% reddit	8%
MemberPress	3% Linkedin Groups	6%
Trybz	2% Pinterest	5%
Disciple	1% Twitch	5%
	Discord	3%
	Clubhouse	3%
	Facebook - WhatsApp	3%
	BiliBili	2%
	WeChat	2%
	Sina Weibo	2%

MIGRATION

Community owners are looking for more ethical platforms

10% of online community professionals said a platform migration for their community is planned within the next 12 months.

We asked those who were planning a move to tell us why. The primary reason was the need for different or more customised functionality.

Ethical considerations were the second reason driving a move – up significantly from 3% in 2020 to 15% in 2021.

Respondent comments suggest the latter is inspired by the most recent round of leaked Facebook revelations (dubbed the 'Facebook Papers'). Community custodians are looking for at minimum, neutral technology partners not actively complicit in amplifying online harms, and a growing number are seeking values-aligned platforms to serve their communities.



PLATFORM RELATIONSHIPS

The relationship between community teams and platforms is all important. Each year we ask community practitioners to describe their relationships with the platforms they work with.

Since we began answering this question in 2019, there has been a clear trend of community custodians (including senior leadership working on community) feeling generally underserved and unsupported by their platform vendors or representatives.

This year their responses fell into three main themes: transparency, support and collaboration.

Each year there is a noteworthy (if unsurprising) difference between those using social media platforms and those using owned platforms. The scale of large third party social networks, their advertising focused business models and prioritising of audience building features over relationship building features, often leaves community managers feeling disempowered and dissatisfied.

This year, respondents working with owned or open source platforms spoke favourably of their ability to collaborate with platform developers, creating experiences that are highly relevant and technologically robust.

Transparency

Support

Collaboration

TRANSPARENCY

Community managers continue to call for transparency over product roadmaps and influences such as algorithmic decision-making that impacts their community experience and culture.

“Too many processes that affect us aren’t transparent and you can tell the developers don’t know how communities work.”

“The platform is always making changes we don’t know about and it affects the running of our community.”

SUPPORT

Many community professionals said there is still room for improvement in communicating with platforms, and they were keen for more proactive support and outreach.

“A proactive partnership would be nice, where they were more invested and committed to our success. We get tired of chasing for help.”

“They should be easier to contact and offer better customer support. We’d like to be able to access new developments and provide feedback.”

COLLABORATION

Community practitioners want the opportunity to add value to platform development through collaboration. There is fruitful ground here to enhance community software and better serve community owners and members.

“It would be good if the platform had a decent set of moderation tools to help shape behaviour in a positive way. We can help them with this so easily if they’d just pay attention.”

Where this cooperation is occurring regularly, community managers speak highly of their platform relationships.

“I have direct access to the developers and it’s working great, as we can share feedback in real-time and no suggestion is offensive. We can influence the roadmap which is awesome.”

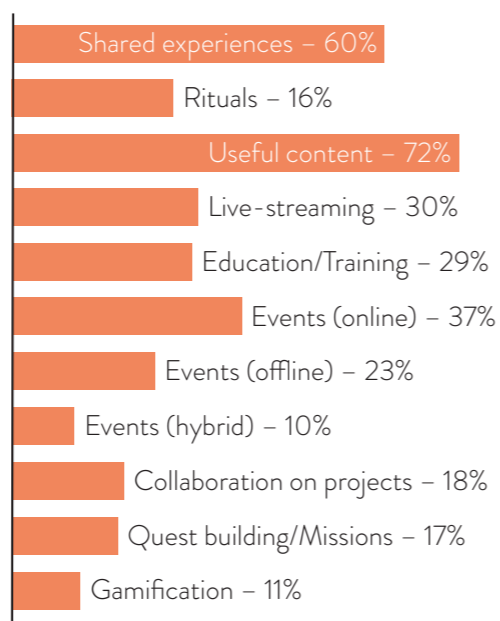


ENGAGING COMMUNITIES

Community managers use a multitude of engagement techniques and practices. This year we asked a more detailed question about engagement to understand the span of approaches and their perceived effectiveness.

We provided a list of common techniques and asked respondents to indicate which they use on a regular basis.

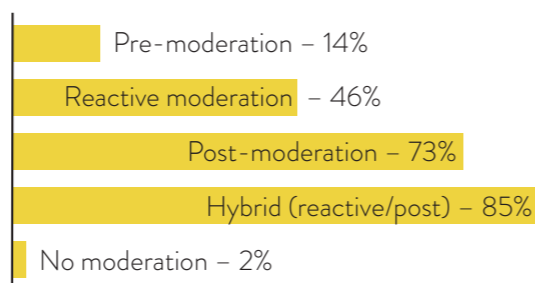
Shared experiences, rituals, needs-meeting content (including that co-created with members), events, live-streaming and education or training were the most popular approaches to engagement. Gamification was the least popular at 11%.



MODERATING COMMUNITIES

Moderation is an important part of community management, necessary to both guard against risk and incentivise constructive community behaviours. In Australia it is also a regulatory essential, as community owners (including non-professionals) may bear liability for the actions of their users.

We polled practitioners to understand the preferred types of moderation being conducted.



AGE OF COMMUNITY

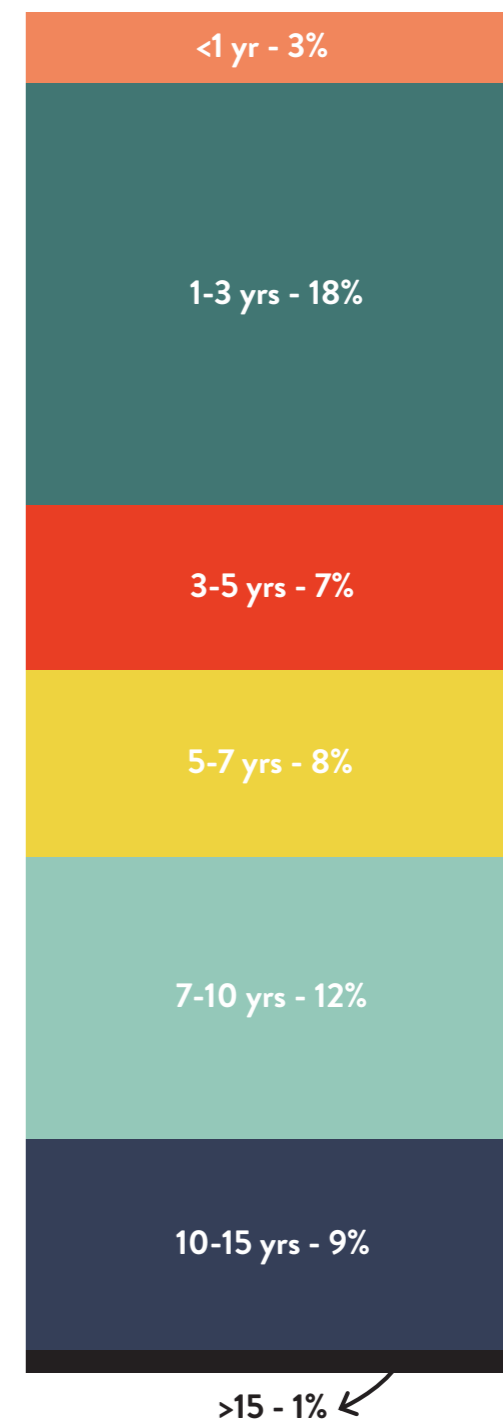
Communities cross an age milestone

For the first time since this survey commenced in 2015, we can report that the majority of Australian online communities are over 5 years old. Collectively, 30% of our communities have been around more than 5 years, with a noteworthy bump in those aged 7-10 years (from 9% in 2020 to 12% in 2021).

2021 saw the closure of two of Australia's longest serving branded online communities - Essential Baby (Fairfax Media) and Thorn Tree (Lonely Planet). These two-decade old communities were a fixture in the local digital landscape, and employed many community professionals. The effects of their closure can be seen in the drop from 3% to 1% in communities over 15 years old.

Community life-cycle³ research shows that most communities require at least 2-3 years before maturity, and will need skilled and consistent community management to achieve this.

³ A. Iriberry and G. Leroy, "A Life Cycle Perspective on Online Community Success", ACM Computing Surveys, ACM Computing Surveys, 41 (2), Article 11, 2009. doi: 10.1145/1459352.1459356

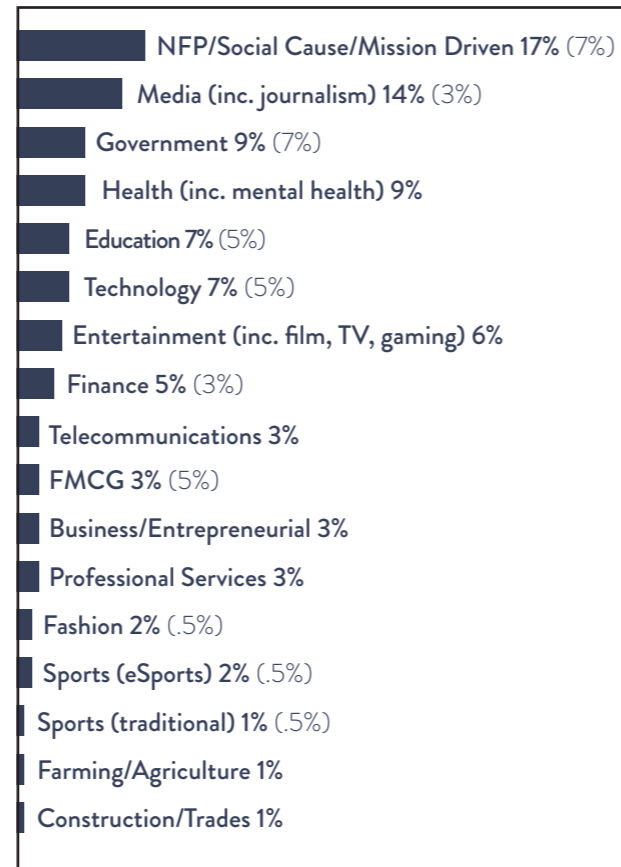


INDUSTRY SECTOR

Social cause online communities lead the way

Not-For-Profit, Health and Government remain the leading sectors hosting online communities in Australia. Not-For-Profit (including social cause and mission driven organisations) have long been a significant force in online communities in our region, and they have seen a notable jump in 2021 (from 7% to 17%).

44% of community practitioners are subject matter experts (SME) in the topic or area their community supports, while 31% do not hold topical expertise for their community (and have been hired primarily as community professionals).



A few of the organisations in Australian maintaining online communities.

BUDGETS

Community budgets remain under pressure

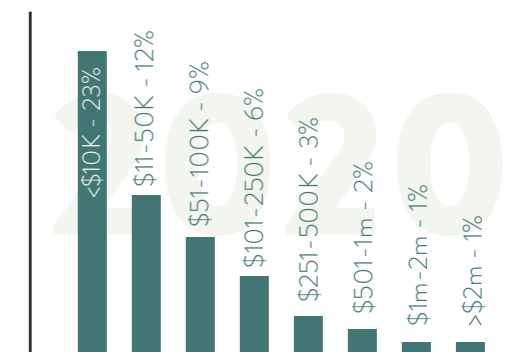
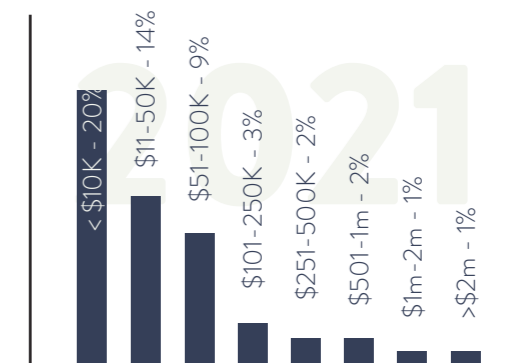
Despite communities acquitting their worth throughout the ongoing pandemic, community operating budgets continue to feel the squeeze. 20% (a majority) of online communities were run on budgets of less than \$10,000 annually (not including staff salaries) during 2021. This percentage is down slightly from 2020 (23%).

The percentage of those running budgets from \$11,000 to \$50,000 has increased slightly this year, from 12% to 14%. Comments suggest those gains have been earned by communities making an effective impact during COVID, and community managers successfully communicating and championing stakeholder value.

Large commercial communities are holding firm at the other end of the scale, with budgets ranging from \$500K to \$2 million plus annually.

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

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



MEASURING COMMUNITIES

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

- | | |
|----------------------------------|-----------------------------------|
| 1. Social impact/outcomes | 6. Acquisition |
| 2. Conversion to member | 7. Social sentiment |
| 3. Net Promoter Score | 8. Discussion ratios |
| 4. Traffic/Downloads | 9. Quality of interactions |
| 5. Knowledge generation | 10. Cases/Issues resolved |

Other popular measures include: Revenue gained, Sales to community members, Call/Support Deflection, Volume of interactions, SEO ranking, Cost savings and Internal/Staff engagement.

In 2020 the economic shock of the COVID-19 pandemic saw interaction quantity and social sentiment prioritised ahead of contextual measures, such as the quality of those interactions or social impact/outcomes. Using a healthy mix of qualitative and quantitative measures is ideal for a community strategy; capturing explicit and relevant outcomes for an organisation, as well as metrics that illuminate the quality of community experience for participants.

As the shocks of COVID-19 have abated somewhat in 2021, this measurement mix has restabilised, and more traditional community measures such as social impact and conversion from visitor to member are once again the focus for community managers.

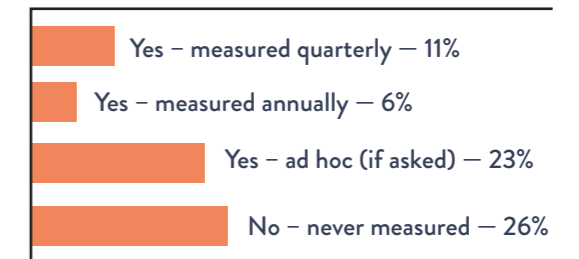
60% of respondents are using community health checks such as the Sense of Community Index (SCI) to measure the social and cultural health of their communities - a key indicator of effectiveness and sustainability. This is up 10% year-on-year, a drop from 2019. Again, we believe this is likely due to economic pressures.

ROI & ECONOMIC VALUE

This year we asked two new questions concerning Return on Investment (ROI), to better understand how this is captured, and for those measuring financial ROI, how valuable their communities are to their organisations. This leads us toward an Australian economics of community.

When asked to elaborate on these questions, most community practitioners said they lacked the time to measure ROI consistently, but recognised it would support their efforts to gain more resources and recognition.

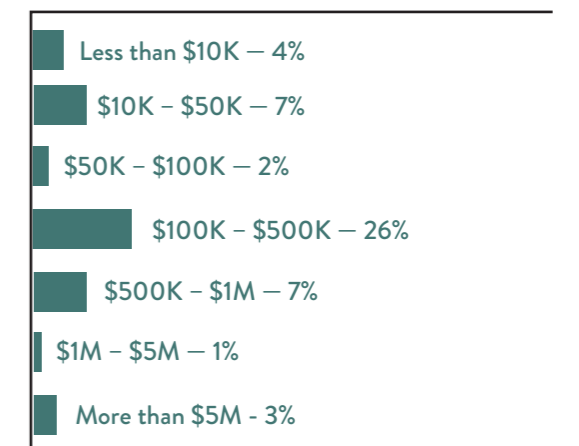
If your community is for a business or organisation, do you measure the ROI (Return on Investment) of your community? How often?

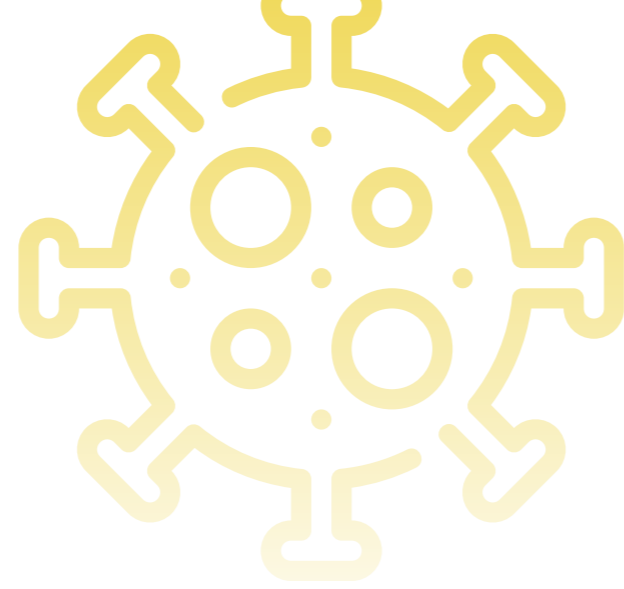


Community worth to the organisation

The majority of communities generating financial impact for organisations are making them between \$100,000 and \$500,000 annually. An impressive 3% of communities are generating more than \$5 million annually.

If you are measuring ROI in dollar terms, how valuable is your community to your organisation (annually)?





PANDEMIC IMPACTS

“I feel that unfortunately there’s many more angry and frustrated people in the world and they go online to vent these feelings. Community managers are bearing the brunt of this more than ever, and it has had an impact on mental health and job satisfaction.”

The COVID-19 pandemic continued to wreak havoc in 2021, with large portions of the country undergoing significant lockdowns and disruptions for months on end. As we found in 2020, online communities have been a popular place for Australians to turn for information, affirmation and peer support (in both constructive and destructive contexts).

Community managers have reported many impacts on their practice, chiefly:

- An increase in demand for their skills
- An increase in recognition that their skills matter
- Social anxiety and polarisation impacting community culture
- Increased pressures and burnout

We have again asked four key questions of survey participants: about the most significant impacts on their work now, the expected impacts in the year to come, the nature of impacts on their members or participants, and any other changes to working life as a result of the pandemic.

Consistent with 2020, community practitioners reported more demands from internal stakeholders, external stakeholders and community members; an increase in workload and a negative impact on their health and wellbeing.

There were small reductions in the number reporting budget decreases and financial stress year-on-year.

2021 pandemic impacts



How will the pandemic impact your work in 2022?

As we adjust to living with COVID-19 and its variants, among other global crises, community practitioners continue to grapple with pandemic-related impacts on their work. Respondents this year told us they expect consistent change and disruption, however much of this is constructive.

Only 12% of respondents anticipate budget cuts in 2022 (down from an anxious 28% in 2020), while 12% expect an increase in team size and resourcing to meet demand (up from 8% in 2020).

19% expect community to play a more strategic role for their organisations next year, and 18% expect a shift in community purpose (up slightly from 15% in 2020).

As Australia has emerged from lockdown, fewer community managers expect to run more virtual events (only 17% compared to 30% in 2020), with most reporting an anticipated return to offline engagement and hybrid (online and offline) engagement.

We asked respondents to elaborate if they wished. The following comments are indicative of their overall contributions:

“It’s interesting – people seem to value a personal connection online more than before.”

“Online communities have been a proof point for asynchronous work!”

“With over 1/3 of the population in long and exhausting lockdowns all year - I think anyone working from home has had that work/life balance rocked. I feel like a lot of those workers (including and especially those engaged with the community) are about to feel some serious relief and simultaneous burnout as the country re-opens. We’re also about to experience a serious labour shortage as we all take turns at using up annual leave balances.”



“I have actually shifted back into community since the beginning of the pandemic, showing that it is back on the radar for organisations.”

“It has made me personally a lot busier and active within my communities, and I’ve taken on more of a leadership role.”

“There’s been a shift to focus more on community and online connection but I don’t know if the shift has always been strategic or meaningful. I’ve anecdotally seen more people turn to social media for connection but without meaningful community building and moderation on those platforms, it’s often been more divisive than connective. This has caused me to experience some overall fatigue/disillusionment with humanity.”

“I have noticed that clients are in short-term thinking and decision making mode due to pressures of COVID. Community building is a long term strategy and some are deprioritising this due to funding constraints.”

What change (if any) has the pandemic created for your community participants?

In 2021 online community use remains elevated from prior to the pandemic. 20% of community professionals told us usage was up again year-on-year, while 35% said their members were showing up with more stress or anxiety. Given the mental and physical tolls of the Delta wave and associated lockdowns around the country, this is unsurprising. Critically, these behaviours are reported across sectors - not just in therapeutic/peer support communities where one might expect, but also in communities of practice, interest and others.

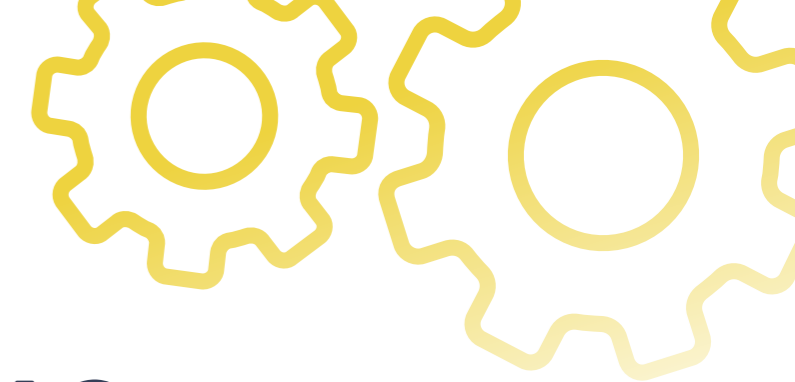
Harmful content is down slightly year-on-year, while affirmative behaviours are up from 14% to 20% as online community members help each other navigate uncertainty and vulnerability.

According to community managers, more users are engaging in self-governance this year. Comments suggest this intervention is focused on tackling trolls, misinformation and online harassment (often spawned by polarised debates).



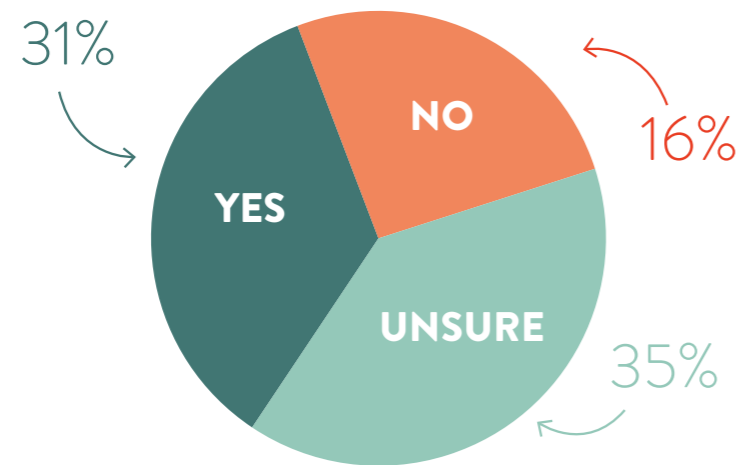
“In addition to the significant increase we’ve seen in community use, the pandemic has helped demonstrate the value of online community to many people.”

THE FUTURE



FIVE YEARS TIME — 2026

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



31% of respondents say they intend to continue working in community management, while a further 35% are unsure at this time.

Among those who said they don't expect to be working in this field in five years time, the most common reason cited is - as per 2020 - a systematic undervaluing of the practice.

Reasons given for not continuing in community management in Australia:

- Lack of understanding and respect for practice
- Lack of resources to perform job and improve impact
- Lack of professional development and career growth opportunities
- Frustrating with dominance of social media platforms
- Pandemic inspired life and career reassessment

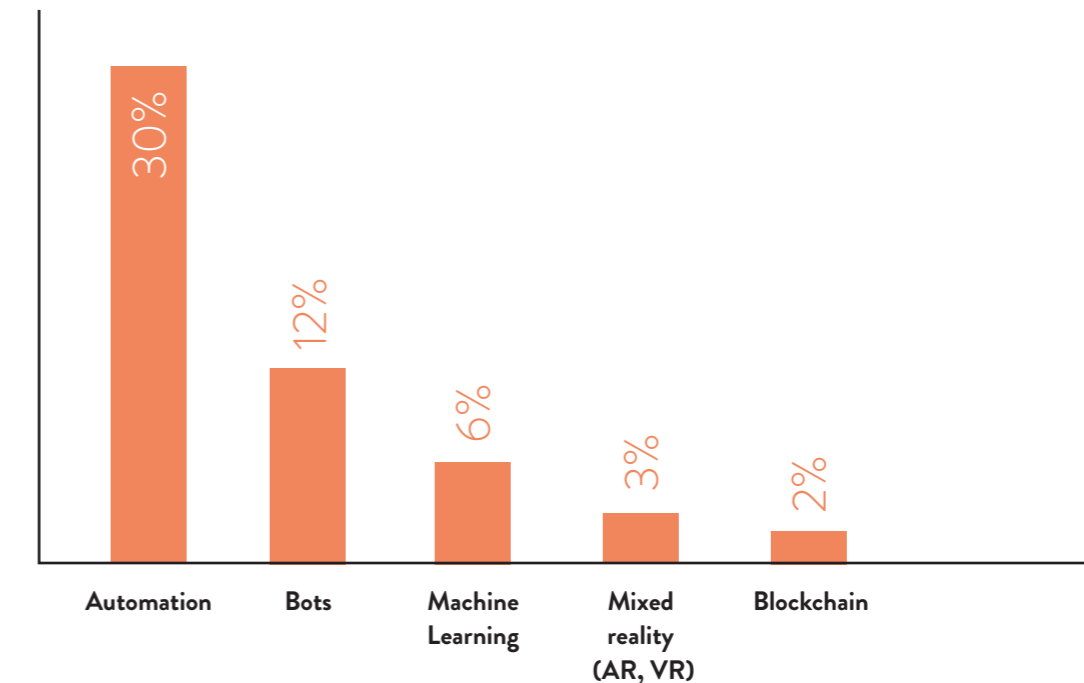
“Community is incompatible with traditional business models that can't evolve. Which is a shame, because ironically, it would help them evolve!”

EMERGING TECHNOLOGIES

Machine assisted community management continues to grow

The use of machine assistance in managing online communities in Australia has increased slightly year-on-year - from 46% in 2020 to 48% in 2021.

Bot usage is the biggest mover, up from 9% to 12% (marking a steady increase over the last three years).

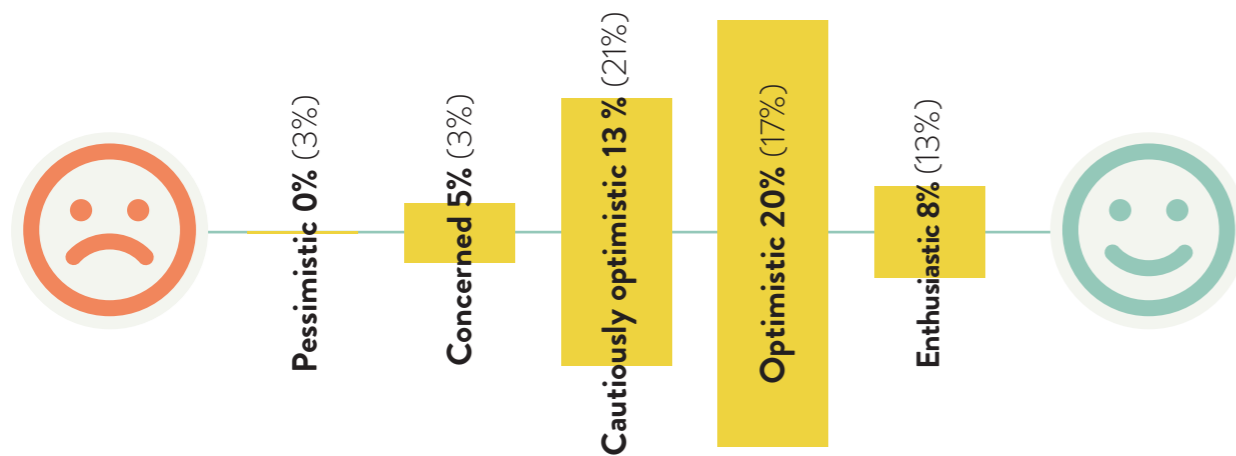


Blockchain has seen a slight increase (up 1%) but is still barely used in Australian online communities at this time.

FEELINGS ABOUT THE FUTURE

Cautiously optimistic about the future.

How do you feel about the future of community management?



Relational, emotional and cultural work - central to front-line community management - is a heavy load at times, and practitioners report high levels of fatigue and relentless pressure to do more with less.

But it's not all bad news. In fact, community professionals seem to be settling into a balanced view of things to come. Cautious optimism has decreased (from 21% to 13%), shifting across to Optimism (up from 13% to 20% year-on-year), suggesting growing confidence that the practice has a viable future.

Practitioners cited factors such as new community management accountabilities (such as legal risk) and greater clarity around the role of community management as distinct from social media marketing as key factors for this positivity. This is the first year since the running of this survey that no respondents have reported feeling pessimistic about the future of community management (historically this figure has been as high as 7%). Comments suggest the increasing visibility of the profession is having an effect on their attitudes.

ENTHUSIASTIC

"I have started "seeing" community everywhere!"

"I think there is a fairly defined fork in the road now between community management and paid digital ads/funnels. There is much more focus on professional development for CMs and more appetite in business to grow customer communities around their product, service or offering."

OPTIMISTIC

"With the increase in legal ramifications of not having a well-moderated online community, experienced community managers are needed more and more."

"If ever there was a time for community as a discipline to shine, it's the next five years."

CAUTIOUSLY OPTIMISTIC

"Organisations still don't fully understand this work or its value, and they expect us to do far too much with far too little. The potential is there but we need to keep educating people about community management (and how it differs from marketing)."

CONCERNED

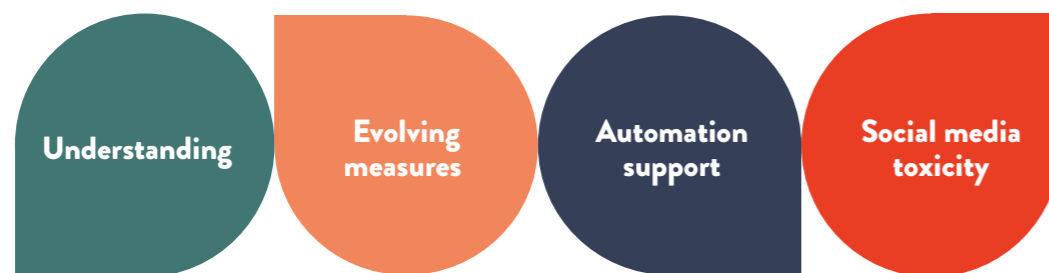
"Organisations have greater expectations for community management, social listening and brand reputation management while social media platforms are increasingly turning towards dark messaging, making the job more difficult and the community harder to support."

"I find the demand for community managers to have a huge skillset is on the increase. If it wasn't for companies wanting a full circus act on the pay rate of a single clown, I probably would devote more to the profession."

AREAS FOR IMPROVEMENT

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

Responses fell into four key themes:



UNDERSTANDING

As per 2020, top of the community practitioners' wish list for what they'd like to change about their practice is how it is understood and perceived by others, particular colleagues, and leaders within their own organisations. There is still deep frustration that the understanding and credibility gap remains wide for many:

"We need to change the perception of community management being about marketing and audience amplification, instead of developing sustainable connections between peers. It leads to so many problems."

"I'd like a deeper understanding that it isn't set-and-forget amongst the C-suite, and the complex value it can actually bring to an organisation."

"People should give it the kudos it deserves. They don't understand how hard it is to build, manage and support communities."

Community managers want mobility in their organisations, and recognise there is still an education gap that needs to be bridged for many decision makers before this becomes normalised.

"I would change how far up the corporate ladder

we aren't, and aren't able to move. Where did the entire planet immediately turn when this pandemic took away our ability to connect in person?"

"Community management is a specialised skill-set and it's shocking to me how many organisations that consider themselves digitally savvy and on the cutting edge can't see this."

Understanding of the profession - or lack thereof - also has impacts on community practitioner mental health and wellbeing, with many respondents speaking to the fact their employers don't grasp the relentless nature of their work and the emotional load they carry on behalf of their organisations, and therefore can't provide suitable support structures.

"We need more empathy internally, which might help us achieve a better work-life balance. Community management can be 24/7, but humans can't be, and we need that to be resourced properly."

"We need more mental health awareness and care from our organisations. Many are trying, but they're not really comfortable having honest conversations yet about community management - which is care work at its core."

EVOLVING MEASURES

Community practitioners have long struggled to measure their work. Stakeholders are often concerned with quantitative metrics and look for higher visible volumes of engagement as an indicator of success - however this isn't always the best way to reflect community effectiveness or impact.

Community managers would like better tools and more freedom to measure holistic and qualitative indicators.

"It would be great if we could make it easier to track qualitative human responses to things - just better metrics all round that help us measure meaningful engagement and not just superficial noise."

"Greater measurement of impact for social service and mental health communities that is not just focused on interactions and acquisitions."

"Our platform doesn't show us anything useful in the way of metrics. It's all surface level."

AUTOMATION SUPPORT

"Less manual work to allow us to be more strategic and effective."

Community managers reluctantly concede that the most human aspects of their work - such as building trust, relationships, and shaping culture - are often neglected in favour of demanding repetitive and manual work, such as low-risk moderation, onboarding or posting content. They would like better tools to help them be more strategic and adopt a big picture view on the social environment they are stewarding.

"With better tools we wouldn't have to work 24/7."

"More automation to take over the things we don't need to be doing by hand, so we can get stuck into the real work of relationships and culture."

SOCIAL MEDIA TOXICITY

“It’s impossible to escape. It seems like people are angry all the time.”

The stresses of our polarised society weigh heavily for online community professionals, who are immersed in them constantly - especially if they are working in third party social platforms where they have less control over the experience, and where technical affordances often incentivise toxic behaviour or content (social media based community managers report these incidents more commonly than those working on owned communities).

“The racism, misogyny and hate is out of control. It’s taken all the joy out of the work for me.”

“Our members appreciate the fact we try to be a kind community as they see so little of that online.”

“Online toxicity and the high volumes of hate online, particularly on the mega platforms.”

Community management is cultural mediation work, performed in partnership with members and stakeholders. Practitioners are reporting that it’s taking more effort than ever to carve out psychologically safe and healthy communities amidst rising tempers and tensions. Health misinformation, the treatment of women and people of colour, and climate change were named in comments as the most volatile issues. Several respondents spoke of the prevalence of microaggressions^{4,5} on social media that may not technically contravene community values or guidelines, but still create exclusionary and harmful effects for some members.

⁴ Harmer & Southern (2021) Digital microaggressions and everyday othering: an analysis of tweets sent to women members of Parliament in the UK, *Information, Communication & Society*, 24:14, 1998-2015

⁵ Sue, D. W. (2010). *Microaggressions in everyday life: Race, gender, and sexual orientation*. John Wiley & Sons



THE
NEXT
STEPS



“Community is the future — I think everyone will need these skills.”

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

There is a growing voice in the practice for national accreditation and standards. 27% of respondents called for this in 2021 (up from 19% in 2020). Comments indicate this interest is informed by the increasing sophistication of the work, the diversity of practices and skills involved, and new regulatory burdens.

The desire for continuous learning and improvement is strong amongst community practitioners across sectors, and speaks to the strengthening professionalisation of the practice.

Professional development around strategy and building business cases for communities remains popular. Other areas of need, such as resources and templates, have been tackled proactively by ACM in 2020, so we are pleased to see requests for this drop from 21% in 2020 to 14% in 2021.





ABOUT AUSTRALIAN COMMUNITY MANAGERS

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

We are the membership organisation 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, 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, and celebrated its 10th birthday in 2021.

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



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