

POST-SOCIAL MEDIA

2020 — X

The Future of Community Online

a report by
co—matter

The 2020s didn’t exactly get off to the start we’d hoped for. The pandemic and its ensuing economic crisis, the ongoing environmental emergency, chaotic politics and the intensification of global surveillance – among many other factors – have created a climate of extraordinary uncertainty. Yet out of the turmoil, new and hopeful possibilities are emerging, from the reinvigorated global fight for racial justice to seismic shifts in the way we work and communicate.

Amidst all the noise, our need for safe and productive virtual spaces where we can gather together, communicate, exchange ideas, build new movements, and support each other has never been greater.

“Post-social media” is about the future of building these digital communities. It’s a term we at co—matter have chosen to describe the shifts in how we’ll connect in the next decade: refocusing our attention, moving from open to semi-private platforms, engaging in hyper-niche communities, synchronizing our experiences, participating in the value creation of tools and platforms, and expecting them to take a stand on issues that matter.

To create this report, we’ve gathered insights from community leaders worldwide; strategists, organizers, researchers, activists, entrepreneurs and other like-minded people who use the internet as a tool to bring people together.

The Post-Social Media Report is the result of our conversations, gatherings and annual survey. It describes the shift in mindset and culture that is emerging in the wake of the social media era (2001-2020), and offers a reflection on social media’s downfalls while pointing to new ways of finding community online.

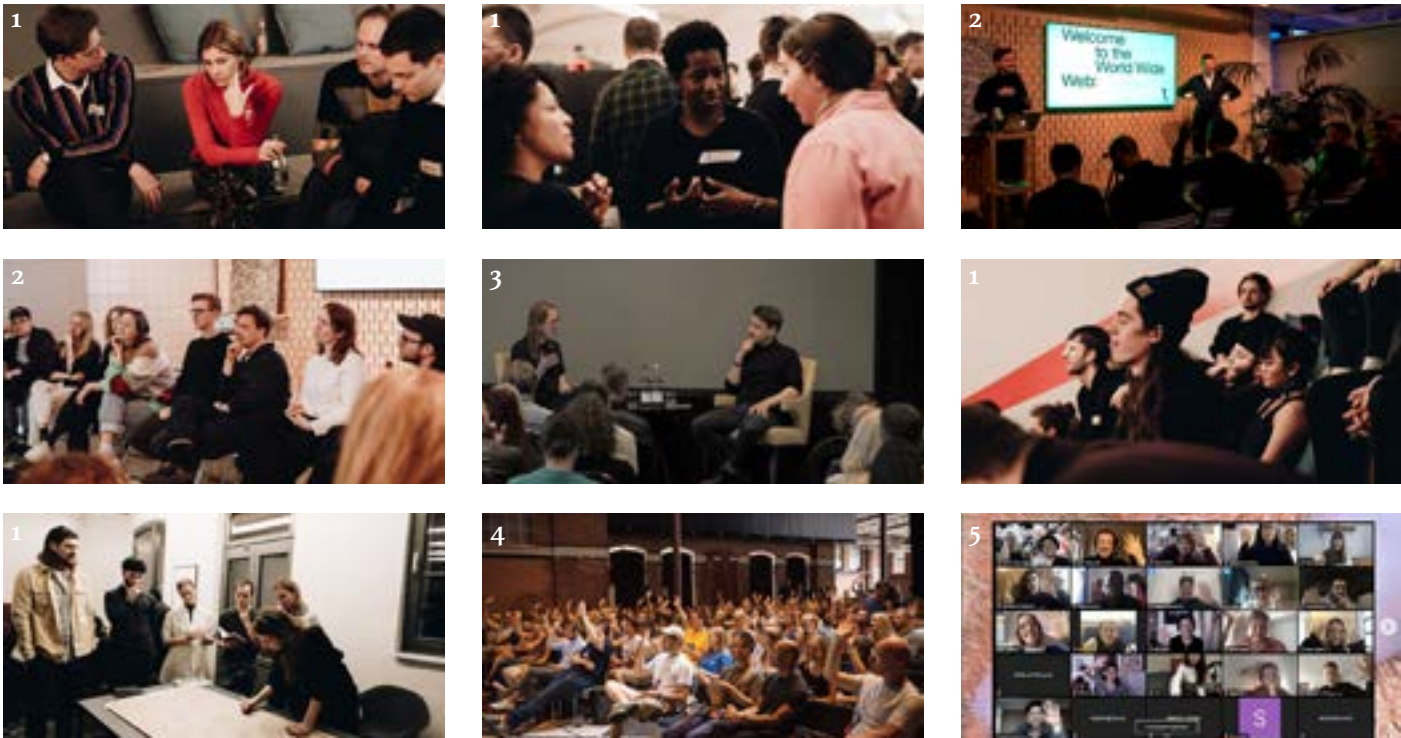
- A. Why are we moving away from social media as we know it?
- B. What defines the post-social media era?
- C. How are we taking control over our feeds – and attention – again?
- D. Why are we shifting from horizontal social networks to vertical, niche micro-communities?
- E. What will the collective experiences of the future look like?
- F. How is the gig economy transforming into the subscription economy?
- G. What are other potential business models that power future communities?
- H. Why can platforms no longer afford to be neutral?
- I. What can you do to shape the post-social media era?

Methodology

To glean insight into what the post-social media era might look like, co—matter embarked on a research journey in early 2019. We first gathered at our summit in Berlin, then surveyed 250 community leaders worldwide and hosted expert discussions through our podcast and conference partners.

The insights in this Post-Social Media Report are gathered through:

- 1. The co—matter summit, where 80 community leaders across industries gathered to discuss the future of building communities in January 2019 in Berlin.
- 2. A community survey of our global network of 250 community organizers, researchers, strategists and activists. Distributed across 38 countries and a wide range of industries – from tech to the arts – all survey respondents use the internet to bring people together.
- 3. Expert discussions with thought leaders in diverse fields, through our podcast and collaborations with conferences and research labs including SPACE10, The Conference, IAM Weekend, and The Future Laboratory.



Some of the gatherings that contributed to shaping this report:

- 1. The Community Leadership Summit, Berlin, January 2019
- 2. Welcome to the World Wide Web at SPACE10, Copenhagen, January-June 2019
- 3. Retail Futures Forum at The Future Laboratory, London, April 2019
- 4. The Future of the Social Web at The Conference, Malmö, August 2019
- 5. IAM Weekend, a global URL X IRL conference, The Internet, March 2020

Welcome to the Post-Social Media Era ^{p10}

Major Shifts
Five transitions paving the way
for the post-social media era

1. Growth → Agency ^{p18}
2. Open → Private ^{p30}
3. Individual → Collective ^{p40}
4. Ad-based → Community-owned ^{p50}
5. Neutral → Responsible ^{p64}

TL;DR: Appendix & further reading ^{p74}

WELCOME TO THE POST-SOCIAL MEDIA ERA

Community on the internet once seemed like the future.
Now it has a past.

Not all that long ago, the ability to connect with everyone on the planet, share information and find the people and causes we truly care about was an exciting promise. For the first time in human history, we were not limited by physical location, background or time constraints; anyone with a working internet connection could go online and find their tribe.

When social media emerged in the early 2000s, it soon took over the task of community building on the internet. We created profiles, chatted with friends and strangers, started groups, and used feeds to stay updated on things we were into.

But soon reality caught up. The platforms that promised to connect us started to capitalize on our desire for connection, belonging and curiosity. Algorithms started to control what we saw in our feeds, data was collected to improve advertising, and platforms were optimized to keep us attached to our screens.

Social media became the new television. It gave us a voice.
It gave us reach. But it doesn't exist to solve our problems.

Our desire to find community and connection hasn't changed. Instead, it's adapting to a new phase, the post-social media era: a future that's emerging from the learnings of the past 20 years of building communities online.

The following report is a close examination of what social media means to us today, and what the guiding principles of the future might look like. It's written for – and from the perspective of – people who use the internet to bring people together.

We hope you'll join us in creating this next era together.

A Very Short History of Community on the Internet

- 1973** Community Memory is the first public computerized bulletin board system. Installed at a record store in Berkeley, California, it let people enter and retrieve messages through a computer.
- 1985** The Well begins as a dial-in bulletin board system and develops into one of the first virtual communities.
- 1990** Echo debuts as a local bulletin board in New York City, where members discuss a variety of topics and attend in-person meetups. More people start to set up online spaces for their communities.
- 1991** AOL (America Online) is launched and creates the largest “walled garden” for online communities so far: its messaging boards are only available to AOL users, many of whom first got online through its dial-up connection.
- 1994** Geocities goes online and provides millions with their first digital homes. Personal guestbooks, forums and chat rooms diversify how people connect online.
- 2003** Friendster goes online, followed by Myspace, followed by Facebook, which soon becomes the world’s largest social network. Widely-available broadband connections replace dial-up modems, allowing people to spend more time online.
- 2010** Instagram makes social media highly visual and ready for the mobile age. Vine, Snapchat, TikTok and numerous other platforms become the channels millions will use to connect with one another.

2020 ...

Pre-Internet

Pre-WWW

Pre-Social Media

Social Media

Post-Social Media

“The major change between the social networks of yore and the social networks of today is capitalism, money. Nobody who was running a BBS system in the ‘80s or ‘70s was doing it for the money...

Creating a place that people wanted to come back to, that felt like their home, like their community that they had some attachment to – that’s how you made money, if at all, in the early social media days.

Whereas now, [social media] is about people coming back, but it’s also about extracting a lot of information about them, too.”



— Claire L. Evans, artist and author, researched how early internet communities evolved, tracing the evolution of their business models from practically non-existent to what is today referred to as “surveillance capitalism”, i.e. the system of gathering and selling personal data for profit.

Quote from a conversation on the co—matter podcast #15.

“We don’t use social media to share cat videos. We’re trying to change the world. It gave us a space at the beginning, and then the same people we were fighting – dictatorships, authoritarian regimes – realized that, and did everything in their power to control that space. Now we’re in their game, we don’t have anywhere else. If I don’t use social media, I don’t exist.”



— Khalid Albaih, activist and political cartoonist. In 2011, Khalid became an important voice of the Arab Spring through his Twitter account – a movement which made him reflect on both the power and the political dimensions of social media platforms.

Quote from a conversation with Khalid Albaih on co—matter podcast #14.

#1 THE GREAT UNFOLLOW – FROM GROWTH TO AGENCY

Growth was the ultimate goal of the social media era. We pursued more friends, more followers and more likes, on as many platforms as possible. A decade later, we're finding ourselves hyper-connected but emotionally unfulfilled. More hasn't made us happy. Instead, we're sadder, lonelier, and anxiety-ridden.

Having realized the cost of our digital habits, and the role that platforms have played in enabling them, we're starting to scale back for the sake of our mental health. We're closing accounts, leaving groups, tracking screen time, turning on flight mode, unfollowing and unsubscribing from the channels that control our attention. No longer considered poor social etiquette, these steps towards mindful reduction are becoming accepted behaviours in service of sanity and focus.

The next decade will be defined by conscious consumption. In this emerging post-growth era, success will reward the platforms and communities that empower us to control our feeds and information intake, rather than keeping us attached to our screens at all costs.

“I delete Instagram after each use so I have to install it again.” — Survey Respondent

Social media platforms were designed to capture our attention and maximize screen time. Now we’re reclaiming our focus by taking control of our digital tools.

74% of survey respondents made a conscious effort to decrease their usage through hacks such as:

- **Deleting and hiding apps**
- **Turning off notifications**
- **Sharing less or no content**
- **Closing accounts**
- **Going offline by turning their phone off or onto flight mode, or simply leaving it at home**

“I’ve actually tried to increase [my use] but in productive, mindful and meaningful ways. How can I connect with people or how can I connect people to each other? I use these platforms more as tools and less as entertainment.” — Survey Respondent

Mindless scrolling is out. The 7% of survey respondents who are actively increasing their social media use are doing so with intentionality, to fulfil specific needs like:

- **Staying updated on specific topics**
- **Finding local events**
- **For research and inspiration**
- **For professional purposes**
- **To engage with brands**

33% of respondents recently left a social media platform.

Reasons why include:

- Fatigued by too much noise and distraction
- Negative effects on mental health and wellbeing
- Disappointed by lack of transparency or ethics
- Mistrust of data use practices

As one survey respondent points out:

“I felt dependent in an unhealthy way, and I wanted to see if the fears I had around loss and lack were true or false. Turns out they were totally false – life is already much better and more interesting.”

We have a love-hate relationship with the social media platforms in our lives.

We depend on them, but they're not serving our needs anymore.

- 42% said their feelings were neutral
- 39% of respondents said they were satisfied or very satisfied with the platforms they use
- 19% expressed dissatisfaction

67% of survey respondents have not recently joined a new social media platform.

Of the 33% who recently joined a new platform, popular reasons included

- For professional purposes
- Out of curiosity
- Because a specific group of people that uses it
- Because it serves a specific need or interest

Reasons for satisfaction	Reasons for dissatisfaction
Opportunity to connect	Platforms aren't inter-operational
Wide variety of purposes	Lack of privacy and data protection
Intuitive and easy to use	Algorithm-driven timeline
Customizable according to preferences	Disagree with platform's values
Good tool for self-promotion	Designed for self-promotion
Free to use	Fear machine
Useful for knowledge sharing	Too much advertising noise
Source of inspiration	Lacks diversity

How to Start Your Own Social Platform

“I wanted to to move the conversation away from ‘Facebook is bad for your privacy – you should move to these other networks because they’re good for your privacy,’ which is true, but not very persuasive. A much more persuasive argument is that Facebook is actually boring, even though you think you’re having fun, and you should move to other networks so you can have real fun.”

— Darius Kazemi



*Quote from a conversation with Darius Kazemi on co—matter podcast #29.

Darius Kazemi is an internet artist and technologist. His research on dismantling network effects (How to incentivise people to leave Facebook?) resulted in “Run Your Own Social”, a guide to building your own social space online.
→ runyourown.social

Network effects:

According to Darius Kazemi, the keys to overcoming network effects lie in:

- A. Recognizing the potential of the decentralized web, which is just beginning to be harnessed (through Blockchain and other emerging tech).
- B. Shifting the way we see our digital spaces – if we treated them in the same way we did our physical ones, we might think twice about accepting their Ts&Cs.
- C. Moving beyond the privacy argument and instead demonstrating the benefits of DIY, self-hosted, and decentralized social networks, so as to incentivize people to create new social networks on their own terms.

Network effects – the idea that people go where others are – have been key to the growth of today’s largest social media platforms; and part of the reason why there’s so little diversity in them. There’s no doubt that network effects are powerful, but they might become less relevant in the post-growth, post-social media era.

The Choice is Yours

How you run your community space is up to you. Here are a few questions worth asking yourself before embarking on the journey:



A. What can members expect?

It's up to you whether and how you collect data, track users, and implement targeted advertising. If you do, tell people why. If you don't, be outspoken about how your practices reflect your values.

B. How will you measure success?

Reconsider just how essential growth or conversion is to what you're trying to achieve. If it's fundamental, great. If not, explore using other metrics such as engagement and quality-based metrics as your key performance indicators.

C. Who controls your space?

While social media platforms are useful for reaching a large number of people, it's never a good idea to build your community exclusively on them. Use social channels to find people, then build your community in a space you have full control over.

#2 THE RISE OF THE NICHE – FROM OPEN TO PRIVATE

The social media era was dominated by large, open platforms. They provided tools for communities, but tightly controlled how they operated. Group features and privacy settings were introduced to work at scale, not to serve the specific interests of individual communities.

The communities of the post-social media era will demand a different infrastructure. Instead of a one-size-fits-all approach, the spaces in which we connect will diversify and be populated by new subcultures that are rawer, weirder and more meaningful.

In order to join, there will be barriers to entry: you might have to be invited, apply, pay or accomplish something to be eligible.

Designed to stay niche, not to scale, the success of these platforms will be based on personal development and identity effects: the ability of people to build deeper connections and stronger identities the more they engage and participate.

“There is a substantial difference in social media use for entertainment or as a pastime versus using it for self actualization or engaging in deeper discussions. This difference often holds me back from posting everything in one place, and instead makes me look for niche or specialized communities.” — Survey Respondent

“I’m excited by the general boom in email newsletters, and see it as reflective of a larger shift in which people are realizing the power of building a connection to an audience they can reach outside of algorithm-driven social media platforms.” — Survey Respondent

“I feel like from 2007 to 2018, social media was centralizing in platforms like Facebook, YouTube or Medium. Now, people are going back to owning their own social media, and decentralizing it through self-hosted blogs, podcasts, forums, etc.”

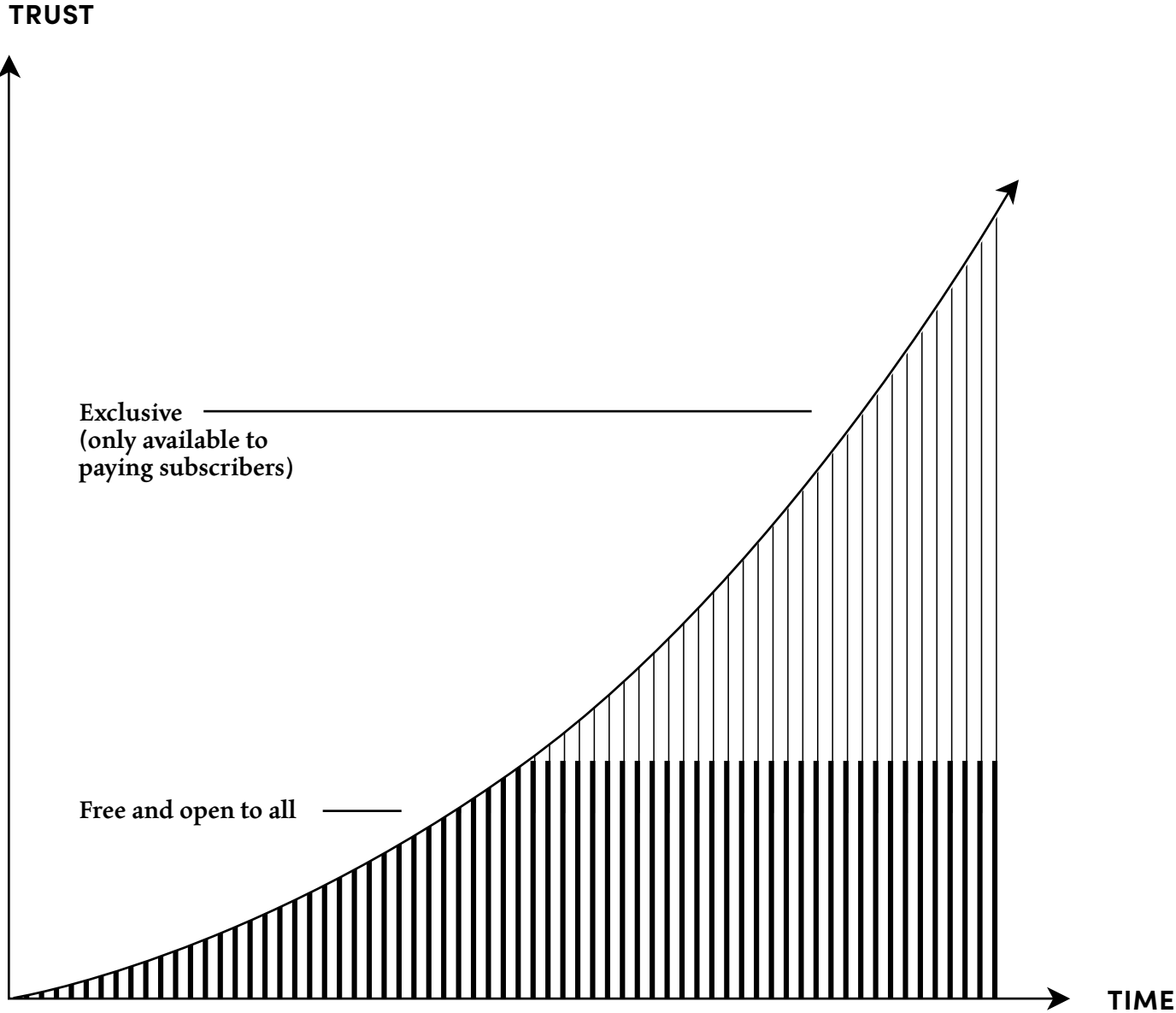
— Survey Respondent

72% of survey respondents would apply at least one selection filter for joining a community today: you either have to be invited, go through an application process, be referred, or pay to become a member.

For 59%, applying one or more of these exclusivity filters is the only way they would start a community today.

29% would keep the community open to everybody.

The Passion Economy



Newsletters and podcasts are booming thanks to their ability to allow creators to directly connect with a specific audience. Many communities begin with a newsletter or podcast first before expanding to other channels (e.g. exclusive content or in-person events) once they have established loyalty and trust amongst their members.

Niche communities will grow in relevance through the highly specific audiences they engage with; platforms like Substack or Patreon offer built-in features that can financially sustain these groups through paid subscriptions by core members.

** Newsletters and podcasts can serve as a first step to building direct, intimate relationships with your audience. Once trust is established, certain members of an audience will progress to accessing exclusive content that they're willing to pay or subscribe for.*

As people are willing to spend more money on things they truly love, creators will be able to sustain themselves with fewer than 100 highly engaged, paying members. This is what the hyped passion economy is about.

How to Build a Media Company for a Niche Audience



“Suddenly, it turns out that young people are much more interested in serious news than people thought. They just want a different tone of voice, and a different relationship with the people who are trying to tell them stories.” — Jakob Moll, co-founder, Zetland

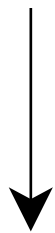
Quote from a conversation with Lea Korsgaard and Jakob Moll on co—matter podcast #30.

Danish media company Zetland is part of a wave of news organizations pioneering quality, digital-first journalism with a platform built not on ad revenue, but the support of a community, which in this case has grown to over 17,000 paying subscribers since its launch in 2016.

How did they do it?

- A. By identifying an unfulfilled niche in their local market, and catering their initiative to an under-served community
- B. By establishing a diverse media portfolio with formats that build a direct connection between community members, e.g. podcasts and live events
- C. By monetizing through subscriptions and strengthening loyalty through direct, ongoing conversations with readers

→ zetland.dk



- A. Exclusivity: The community targets a specific group of people differentiated by one or a combination of factors like interest, age, profession, access, status or expertise.
- B. Access: Community members' journeys take them through several tiers, with access to more features, information, or layers of engagement the higher up they go.
- C. Identity: The community allows members to develop a unique identity and express themselves authentically.

Join co—matter PLUS

If you become a paid member for \$100 per year or \$10 per month you can connect with like-minded community leaders in our private community space, get access to members-only resources, as well as our full archive, profile and member directory. The community is limited to 250 members at a time.

Become a co—matter PLUS member

A fictional ad for the exclusive co—matter member community tier.
Would you be interested?

#3 COLLECTIVE EXPERIENCES – FROM INDIVIDUAL TO TOGETHERNESS

The social media era was about hyper personalization. Algorithms structured information based on our individual behaviour and optimized our attention spans, encouraging us to stream, scroll and share as much as possible at any given time of day.

As much as we've enjoyed aspects of this new reality, the hyper personalization of the internet has led to polarization, filter bubbles and the loss of collective experiences. Previously shared moments have been replaced by individual experiences that each of us perceive by themselves.

In the post-social era, we aim to reclaim collective experiences in the physical and digital space. Third places, the spaces where we meet to perform a certain activity while spending time together, will become key for people to experience time and space together.

The places that enable them – games, collaborative software, streaming platforms, physical environments – will thrive in the post-social media era.

New Third Places



Dance parties are popular pastime activities in Fortnite, a free multiplayer game that's often used as a way to hang out with friends.

In 1989, sociologist Ray Oldenburg coined the term “third place” to describe the semi-public spaces between home and work that instigate community: pubs, coffee shops, libraries and public squares.

Fortnite, Animal Crossing and Roblox are just few examples of virtual gaming environments that are establishing a new kind of third place for people to hang out in. On these platforms, playing the game often becomes a secondary activity.

Real-time collaborative software like Figma, Notion, Miro, or Zoom serves the same purpose for professional needs. As teams become more distributed and working from home the new standard, these platforms have become important tools for working together effectively, but also for connecting with colleagues.

While these new virtual third places open up new spaces for connection with a global community, physical environments will be redefined according to our common desire to disconnect from our screens and connect with people locally.

Collective Experiences: URL x Global

New virtual interfaces enable collective experiences; bringing people from all age groups and backgrounds together online.



Games like Fortnite, Roblox or Animal Crossing allow players to hang out while playing. Concerts hosted by Marshmello or Travis Scott draw in millions for a shared experience.



Streaming platforms like Twitch or virtual sport interfaces like Zwift gather people together for shared activities, like watching games or cycling.



Software like Figma, Notion or Google Docs enables people to work collaboratively in real time, often on shared screens via Zoom or other video chat interfaces.

Collective Experiences: IRL x Local

Physical environments gain new value.
The virtualization of our lives fuels our desire to log off
and connect locally.



Private, exclusive gatherings like dinners and roundtables.



Semi-private activities like sports clubs, book clubs, networking events.



Open collective experiences like demonstrations, coming together to support a shared cause or fight towards a common goal.

“People want to unite around causes and common interests in real life.

I believe that online platforms are a great and important facilitator of offline interaction.”

– Survey Respondent



Mobile devices will remain an indispensable tool for connecting with our communities. Instead of keeping us attached to our screens, post-social media platforms will enable people to log off and connect with the physical environment around them.

#4 COMMUNITY OWNERSHIP – FROM AD-DRIVEN TO COMMUNITY-OWNED

The social media era was built on advertising. At first, platforms offered unprecedented reach to all, but they quickly became the middlemen for advertisers keen to connect with their audiences. As a result, platforms' rules, regulations and functionalities became increasingly optimized to serve the needs of their advertisers, not their communities.

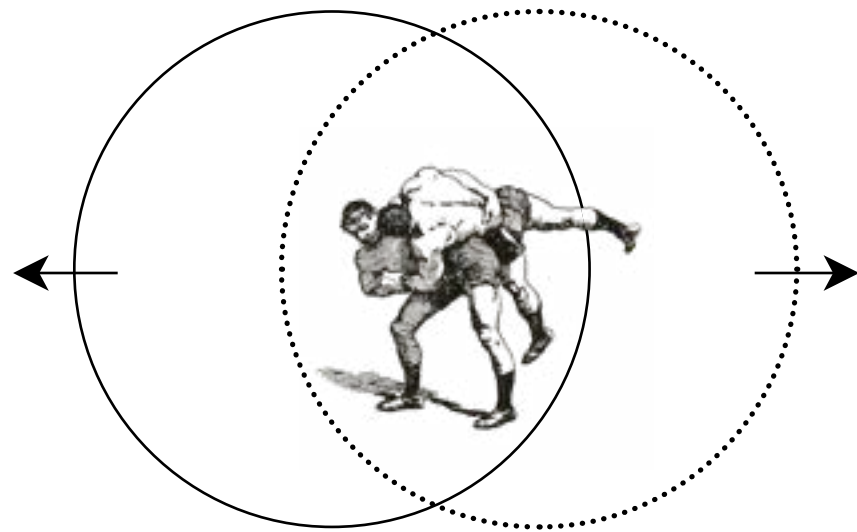
The post-social media era will be shaped by more cooperative models that involve people in the value creation of the platforms they use. Within these models, we will either become paying members (subscription-based model) or contribute a share of the value we create to the platform itself (co-op-based model).

We'll likely see the emergence of more systems that enable people to participate in value creation – both for the platform and for themselves. These business models will allow communities to better align with their members' interests, become sustainable, be more engaged, and offer more intentional interactions.

- 65%** of survey respondents would choose subscriptions as their preferred way to sustain a community
- 82%** would choose other ways of direct-from-community funding, such as donations, merchandise or ticket sales
- 61%** would choose external funding, such as sponsorships or venture investment
- 16%** would choose advertisements

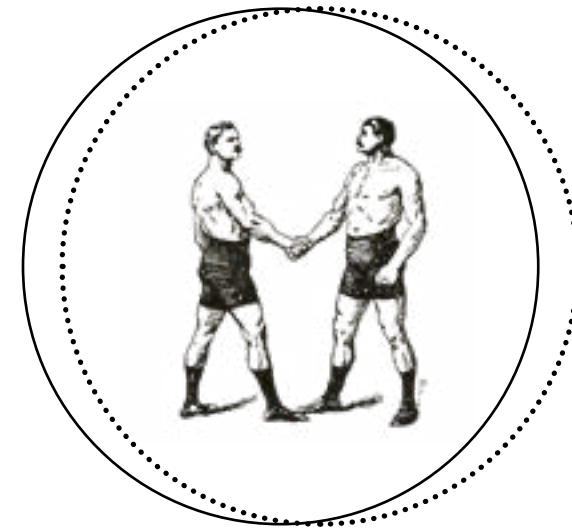
Data taken from the multiple-choice question:
“If you were to start a community today, how would you sustain it?”

Ad-Driven Platforms



Ad-driven platforms find themselves in a constant struggle: while they optimize to enable their clients to grow and increase revenue, they have to keep the (free) platform interesting enough for people to still engage with it. Once that equilibrium is weighted too far towards the former, people will leave and the platform, including all communities it hosts, will collapse.

Membership-Driven Platforms



Membership-driven platforms include members in their value creation. If the people who sustain your platform are also those who engage with, it you're incentivized to design for their needs. In the post-social media era, subscription and co-operative models will aim to create places for communities to become more aligned, sustainable and intentional.

Emerging Platform Ownership Models

“Platforms can be built to serve community interests, rather than being lottery tickets for founders and investors to get rich.”

– Ampled

- A. Subscription: For a recurring monthly fee, creators, communities and platforms engage in a direct relationship with their members. In order to be self-sustaining, the community’s purpose and evolution must stay aligned with the interests of its contributors.

Example → studyhall.xyz

- B. Participatory: People participate in the creation of the platform, encouraged by economic incentives. Most emerging decentralized (crypto) networks allow members to participate in the value creation of a community by owning and trading tokens.

Example → twitch.app

- C. Cooperative: The community cooperatively owns the platform. Ownership and control belong to the people building and using it, and revenue is reinvested in the community and its members, not channeled to external investors or advertisers.

Example → ampled.com

“Here’s how Are.na subscriptions work: there’s a limit to the amount of content you can save, and once you hit that point, you either know whether or not it will be useful. If so, we ask that you pay a small price to help us keep it going. That feels like a fair deal. In this sense, we’re motivated to make the platform as healthy and nice-feeling as possible.”

– Charles Broskoski, co-founder of Are.na*



*Quote from a conversation with Charles Broskoski on co—matter podcast #24.

“Pinterest for nerds,” is how Charles Broskoski, co-founder of Are.na, describes his visual organization platform to his parents’ friends. Since its origins in 2010, Are.na’s slow evolution into a no-frills space for gathering and connecting ideas has earned it a cult following in creative circles.

→ are.na

The building blocks of Are.na’s success:

- A. Find a revenue stream that fits your purpose. Advertising was never an option for Are.na, as its founders believed it was at odds with their goal of liberating information. Instead, they asked themselves, “How can we make a business model that motivates us alongside those who use it?”
- B. Let members get to know the platform before they contribute. Users can spend a lot of time getting to know Are.na before hitting the paying tier – by then, if they love it, they’ll be happy to pay for it.
- C. Strong community leadership is non-hierarchical. “The mistake a lot of people make is thinking they’re on the outside, shaping this thing, when they’re really a participant,” says Charles. “Be around, let people come to you, and take people’s opinions seriously.”

“When I talk to people who are launching membership programs, many of them tell me, ‘We spend so much time talking about those little extras to add to the membership proposition,’ like a tote bag or extra tickets. Yet what we consistently heard was, ‘Please don’t spend my money on that. I want my money to go to the journalism. I want to support the work that I already value.’”

— Amanda Michel, Global Director and Senior Product Manager of Contributions at the Guardian



Quote from a conversation with Amanda Michel on co—matter podcast #26.

Ever since the internet made free the new norm, legacy publishers have been scrambling to stay financially viable. At the Guardian, Amanda Michel has paved the way for a successful subscription model, with over one million readers contributing in 2018. In 2019, the Guardian announced it had broken even through its member subscriptions, marking one of the most significant turn-arounds in recent British media history.

Here’s how they did it:

- A. By asking their members what matters most to them. It wasn’t extra perks and gifts that the Guardian’s members wanted their contributions to be invested in, but quality journalism itself.
- B. By tailoring contribution options to region and culture. While in the UK and Europe, direct debit contributions are popular, the Guardian’s American members prefer to actively make single or recurring donations.
- C. By keeping a feedback channel open. Beyond financial support, members of the Guardian are regularly asked for their opinion, which allows their voices to be heard and their feedback implemented.

→ support.theguardian.com

What Are the Benefits of a Distributed Ownership Model?



A. Intentionality
Members engage with the community in an intentional relationship by actively subscribing and committing themselves to the community's values and purpose.

B. Ownership
The community owns or co-owns the platform it uses to organize itself and share information. Guided by a common interest in keeping your purpose and goals aligned, you're incentivized to design the platform according to your members' needs, not those of external profiteers.

C. Longevity
As a creator or community organizer, a contribution-based community allows you to predict your income more reliably than you could with an ad- or click-driven model.

#5 NOTHING IS NEUTRAL – FROM APATHY TO RESPONSIBILITY

Fake news. Polarization. Manipulation. Racism. Hate speech. Cancel culture. The social media era was defined by platforms refusing to take responsibility for the tangible consequences of connecting everyone on the planet. We've learnt the hard way that technology is not neutral.

We're entering the post-social media era aware that cyberspace is not a utopia, but a mirror and amplifier of the challenges we face in the "real world." Technology embodies the values of those that build it. It affects those that use it. And it can be manipulated and abused in the absence of guidelines, rules and regulations.

In a world that's in a constant state of emergency – facing climate change, a pandemic and widening inequalities – technology companies can no longer afford to be neutral. Their future builders will need to participate in navigating the complex ethical challenges of our time; and those who do so intelligently will be rewarded by widespread user adoption.

A New Infrastructure Based on Values

The digital environment is adapting to models based on values, ethical business practices, and privacy and security features, including:

Non-Neutral Software:

Messaging apps like Signal and Telegram, web browsers like Brave and Firefox, and search engines like DuckDuckGo and Ecosia take a clear stand. Besides pure functionality, they increasingly attract users through their approach to data collecting (or lack thereof), privacy and sustainability.

Non-Neutral Technology:

The larger shift towards decentralization and blockchain make transparency and security an inherent part of the underlying tech stack instead of just an optional nice-to-have.

Non-Neutral Movements:

Initiatives like the Centre for Humane Tech, the Mozilla Foundation, Society-Centred Design, Responsible AI and Zebras Unite make the case for a more responsible, value-driven approach to creating technology.

Non-Neutral Investments:

Venture capitalist funds like Diversity VC, Backstage Capital and Omidyar Network invest exclusively in companies that promote diversity, equality or ethical solutions to tech.

Non-Neutral Brands:

Global brands become aware of the problems and start to take action by withdrawing advertising from neutral platforms or leaving platforms altogether to protest against their practices.

A Movement for Value-Driven Companies

“We could see that these hyper-fueled social media platforms and their business models of advertising were directly breaking democracy. Then there were these companies that were coming in to try and repair what had been broken. In the process of repair, it became clear that we were missing both the corporate structures and capital systems necessary to enable those companies to exist.”

— Mara Zepeda, co-founder of Zebras Unite



Quote from a conversation with Zebras Unite on co—matter podcast #23.

Zebras Unite spans six continents, with 40 chapters and a 4000-strong online community that empowers founders of all backgrounds to align themselves with values that resonate, and to attract the investors who share them.

Here's what they learned in the process:

- A. The traditional VC unicorn model doesn't work for everyone. The values it's based on – disruption, crushing competition, maximizing shareholder value, reaching the “all-time greatest” status – reflect a particular Silicon Valley mindset that isn't shared by all founders and investors, and shouldn't have to set the industry standard.
- B. There's a desire for more ethical, diverse and inclusive investment systems. Hierarchical power structures are being dismantled and replaced with mutually-beneficial communities based on respect and eye-to-eye exchange.
- C. Purpose isn't mutually exclusive with profit. Some of the most successful startups – and communities – are those who find ways to grow ethically.

→ zebrasunite.coop

“Until now, the internet playbook has been: raise a lot of VC money, maximize metrics, go public, cash out, exploit your users. But that’s just one possible storyline of the web. How do the outcomes differ if our core assumptions change?”

— Yancey Strickler, Author, Co-founder and Former CEO of Kickstarter



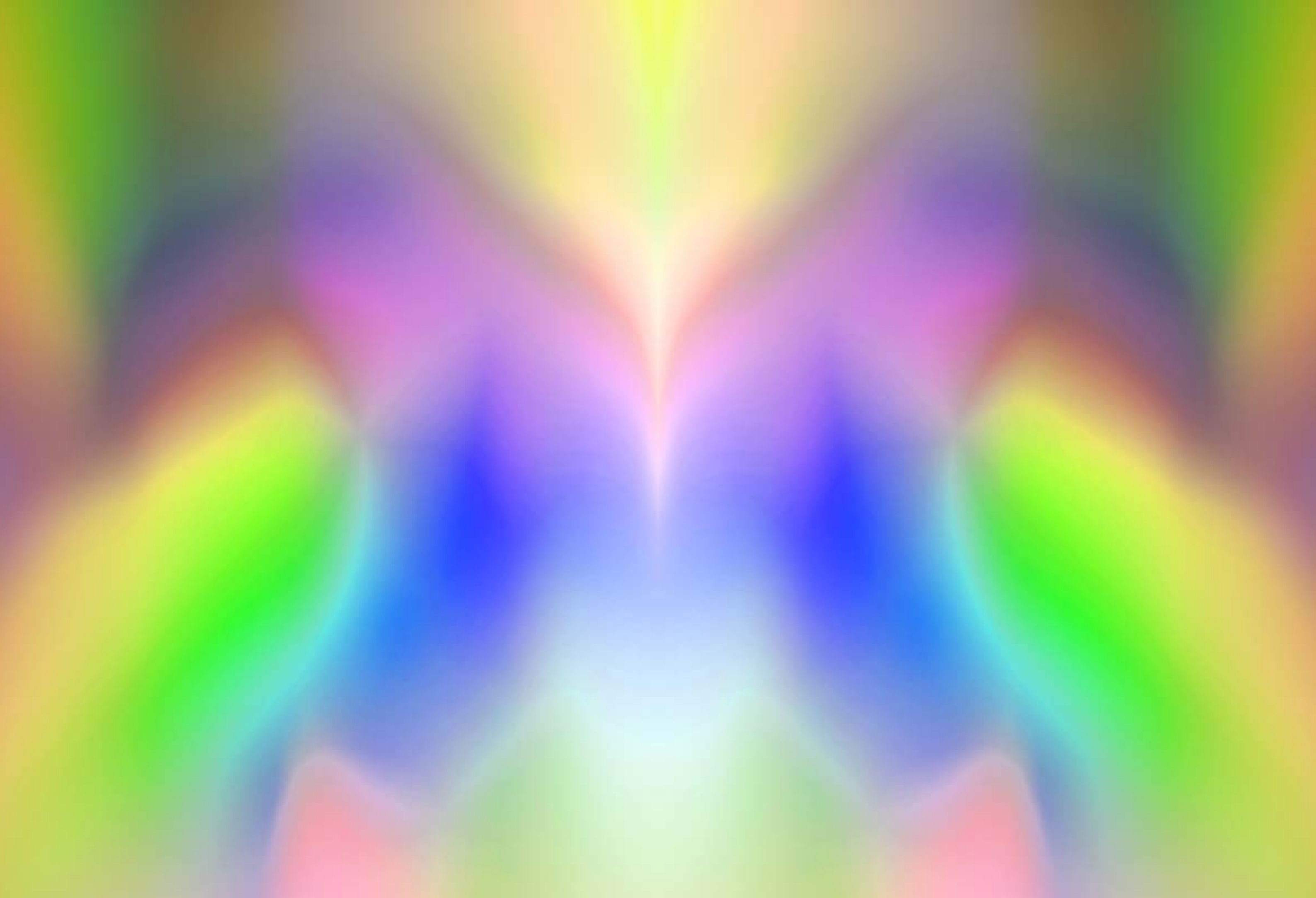
Quote from a conversation with Yancey Strickler on co—matter podcast #27.

After ten years at the helm of Kickstarter, Yancey Strickler stepped away from the pioneering crowdfunding platform he’d co-built to think deeply about what it had taught him about the future of the internet – and the economic models underpinning its development.

What if we’d built internet platforms based on values other than economic growth? Yancey outlines three paths to an alternative future:

- A. It’s time to move beyond pure growth. Over the past decade, the internet’s economic model has been based on rampant growth at all costs. But that doesn’t have to be how it continues.
- B. It’s time for a paradigm shift. Once we break free from the idea that “the only purpose of money is to make more money,” alternative models can emerge.
- C. Cooperative ownership will become the new normal. Platforms that are 100% user-owned and -run ensure the value they create goes directly back to those they were designed to serve.

→ Learn more: bentoism.org



TL;DR — HOW CAN I MAKE MY COMMUNITY THRIVE IN THE POST-SOCIAL MEDIA ERA?

- A. **Give Agency**
Empower people to retain control over their time and attention. Choose channels and platforms that enable them to do so.
- B. **Serve Your Niche**
Be as specific as possible about who your community is for and what you're trying to achieve. Make it private, not open.
- C. **Create Space**
People want to share experiences. Create the spaces and opportunities for them to do so.
- D. **Share Ownership**
Involve people in the value creation of your community. Align your incentives with your members, not external parties.
- E. **Stand for Something**
Define what you stand for and speak (and act) up for it.

TL;DR — SOCIAL MEDIA VS. POST-SOCIAL MEDIA

Social Media Era (2000 –)	Post-Social Media Era (2020 –)
Many connections (1000+), unlimited potential reach	Fewer connections (<100), deep engagement on specialized topics
Open	Exclusive or semi-private communities
Free for all	Barriers to entry
Curated by algorithms	Curated by trusted connections
Revenue through advertising	Revenue through subscriptions and other direct participation models
Extractive platform ownership	Inclusive cooperative ownership
Designed to collect data	Designed for privacy
Platforms are neutral Number of followers as status signaling	Platforms take responsibility Quality of interactions as status signaling
Growth as key success metric	Trust as key success metric

TL;DR — THE POST-SOCIAL MEDIA STACK

Where should we get started?

Direct-to-creator platforms

Patreon

Substack

OnlyFans

Virtual third spaces

Fortnite

Roblox

Animal Crossing

Real-time collaboration tools

Notion

Miro

Figma

Live streaming

Twitch

Discord

Zoom

Closed community platforms

Circle

Commsor

Spectrum

Privacy-focused messaging

Signal

Hey

Wire

and many more...

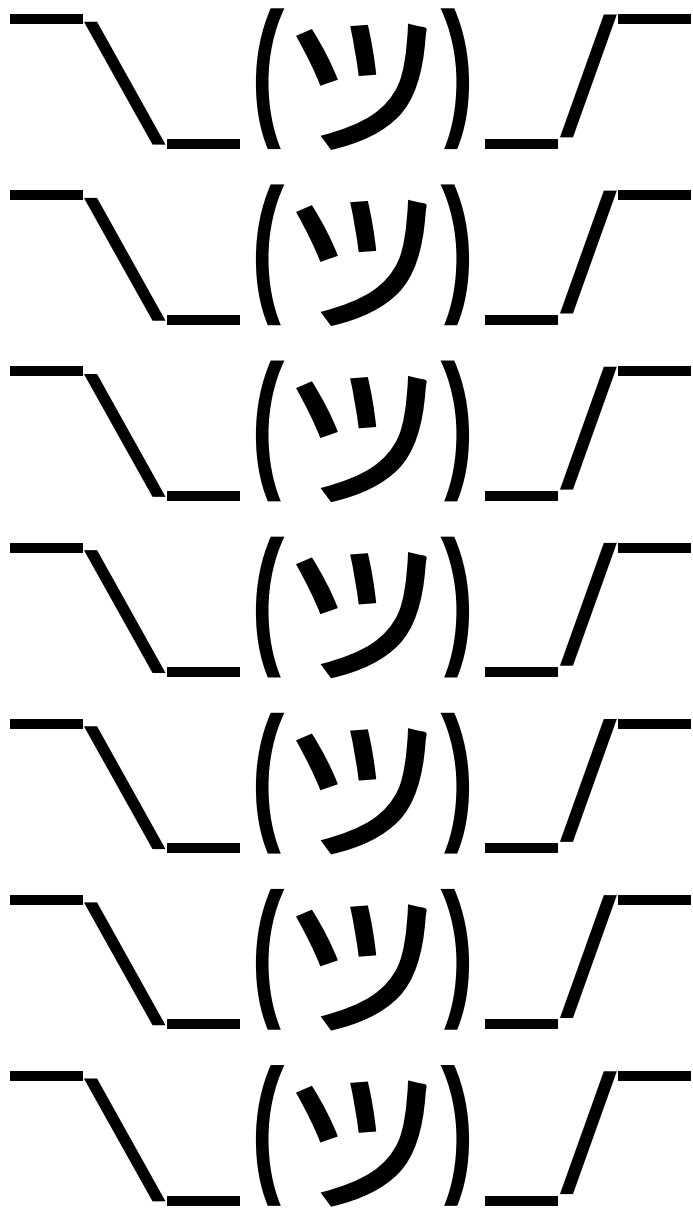
A Letter from the Publisher

I started co—matter in 2017 as a platform to find like-minded people: people who, like me, grew up with the internet and believe in its potential to bring people closer together. Around the same time I started working with companies to help them build communities online. I soon started to see the paradox behind that endeavor. While we seek to find connection and belonging online, the companies and platforms that facilitate these connections often have other motives in mind. Money needs to be made, shareholders pleased. I learned that the Internet is no longer the innocent space we grew up with. It probably never was.

Accordingly, my curiosity about online communities evolved into ongoing research about the internet as such. Through conversations with people I admire (many of whom are included throughout this report) I’ve started to gain a deeper understanding of the economical, political, cultural and societal dynamics that shape the world wide web. I believe their ideas, and those of the people who attended our summit and participated in our survey, are the voices of a new generation. We who grew up with the internet are building a language to describe the world we live in. It’s our responsibility to say and do something with it.

2020 marks the beginning of a new era. Every day we wake up and make choices. As individuals, as members of society, and inhabitants of this planet. More than ever, our actions matter. And yet, there are no individual solutions to the collective problems we face. My hope for this report is that it inspires people and organizations to build communities that give us strength, knowledge and resilience to take on the future – whatever it holds.

Severin Matusek
Founder, co—matter



About

co—matter is a global network and brand consultancy exploring what makes communities thrive.

→ co-matter.com/strategy

Further Reading & Listening

Conversations on the co—matter podcast

- #34 Lea Korsgaard & Jakob Moll:
Zetland, The Future of Community-Based Media
- #33 Darius Kazemi: How to Create your Own Social Network
- #30 Yancey Strickler:
Could This Be Our Future?
- #28 Amanda Michel:
Why Not Ask Readers to Contribute?
- #25 Charles Broskoski:
The Story Behind Are.na
- #23 Jennifer Brandel & Mara Zepeda: How Zebras Unite Make Startup Culture More Inclusive
- #15 Claire L. Evans:
The Women Who Built The Internet
- #14 Khalid Albaih:
How We Lost the Internet

Books

- Lurking: How a Person Became a User - Joanne McNeil (2019)
- How to Do Nothing: Resisting the Attention Economy - Jenny Odell (2019)
- The Age of Surveillance Capitalism: The Fight for a Human Future at the New Frontier of Power - Shoshana Zuboff (2019)
- Trick Mirror: Reflections on Self-Delusion - Jia Tolentino (2019)
- The Trust Manifesto: What you Need to Do to Create a Better Internet - Damian Bradfield (2019)
- This Could Be Our Future: A Manifesto for a More Generous World - Yancey Strickler (2019)
- Broad Band: The Untold Story of the Women Who Made The Internet - Claire L. Evans (2018)

Articles

- 1,000 True Fans?
Try 100 - Li Jin, a16z (2020)
- A Social Resurgence - Rebecca Kaden, USV (2020)
- Premonition - Toby Shorin, Drew Austin, Kara Kittel, Edouard Urcade, Subpixel Space (2020)
- The Passion Economy and the Future of Work - Li Jin, a16z (2019)
- Come for an Action, Stay for the Community - Rebecca Kaden, USV (2019)
- Status as a Service (StaaS) - Eugene Wei, Remains of the Day (2019)
- The Everything Manifesto - Lucy Black-Swan, Andres Colmenares, IAM (2019)
- Fortnite Isn't a Game, It's a Place - Owen Williams, Charged (2018)
- Why Decentralization Matters - Chris Dixon, OneZero (2018)

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