Association Governance and Membership 2025

2nd Joint Survey

MAVENCE

ESAE
EUROPEAN SOCIETY OF ASSOCIATION EXECUTIVES

FOREWORD

In an increasingly volatile environment, shaped by radical geopolitical changes, it becomes more important than ever to understand the way our organisations are structured. Having the right analytical tools, will allow us to support European and International Associations as they become more professionalised, tech and business-savvy, and innovative in the ways they serve their members, and stakeholders. Building on its fruitful partnership with Mavence, the European Society of Association Executives is proud to co-present this insightful Association Governance & Membership Report. We are confident this will be a valuable tool for the Association Community at large.

Ioannis Pallas, Managing Director - European Society of Association Executives

74
ASSOCIATIONS

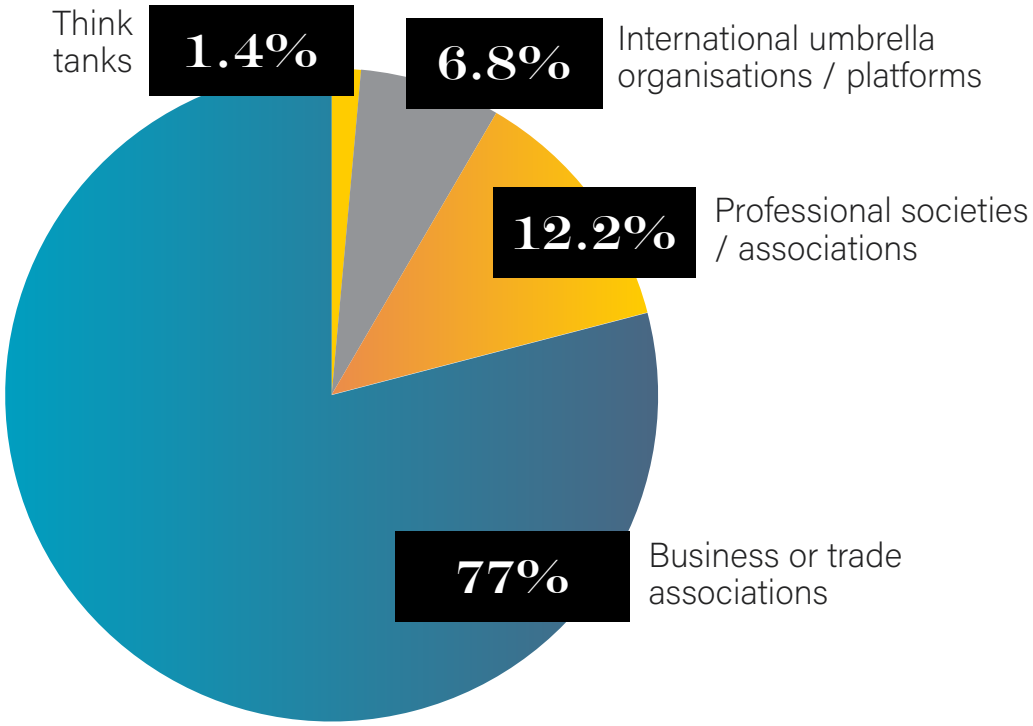
8
CITIES ACROSS THE EU AND NORTH AMERICA

22
DISTINCT INDUSTRIES AND SECTORS

+1000
EMPLOYEES

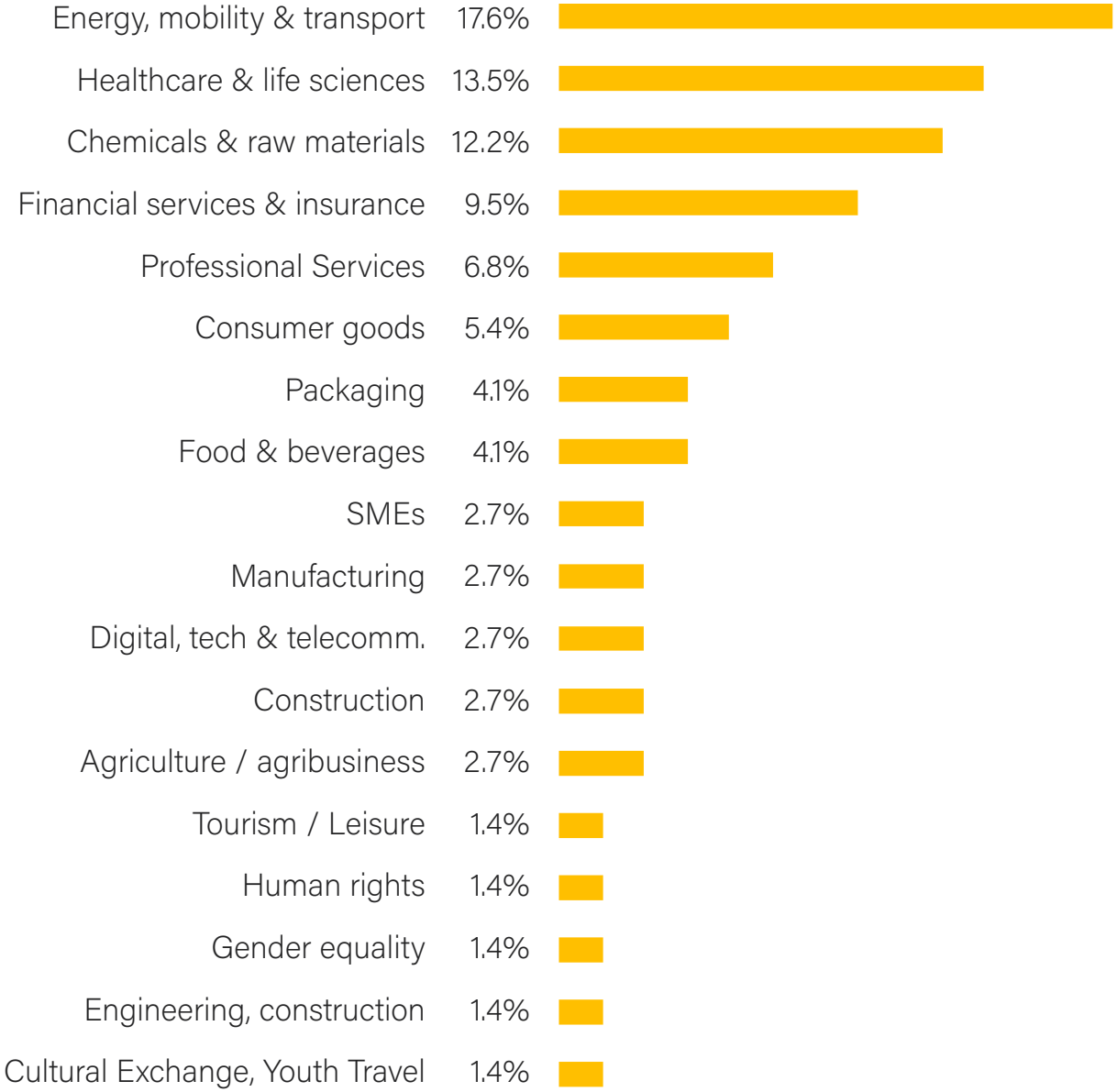
WHO ARE OUR RESPONDENTS?

Of the 74 association leaders who participated in the survey, a majority of them are based in Brussels (+85%), reflecting the strength of the city as the hub of EU activity and the ESAE leadership community. While the focus of the survey was first and foremost European associations, the fact that associations across – and beyond – Europe engaged with this initiative is striking in highlighting the international resonance of the questions we asked.



+85% BRUSSELS-BASED RESPONDENTS

WHO ARE OUR RESPONDENTS?



Our insights come from diverse sectors and organisational structures, not just diverse geographies.

Just **over ¾** of our responses came from **business or trade associations**, with the next largest group composed of professional societies (12%).

In contrast, in terms of industry and policy fields there is a much more eclectic cross-section of sectors represented, with **energy, mobility & transport** (17.6%), **healthcare & life sciences** (13.5%), and **chemicals & raw materials** (12.2%) the three most common sectors, with 22 broadly defined groups captured in all.

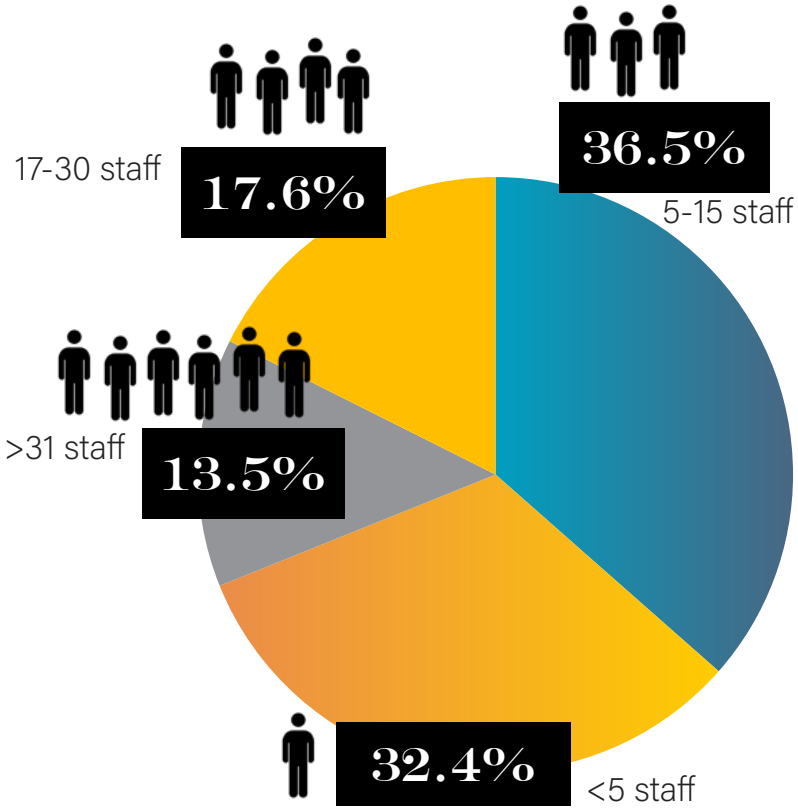
SECRETARIAT & TEAM SIZE:

On average, associations of between 5 and 15 staff were the most represented in our study, closely followed by very small secretariats with fewer than 5 people. Much larger associations, especially those with more than 30 team members, were far less common.

Some sectors, like associations working in chemicals & raw materials, mirrored these general averages. Others, however, stood out for the way they seemed to diverge from the average. Energy, Mobility & Transport associations, for example, tend to be much larger, with small teams (<5) actually making up the smallest group within that subset of respondents.

One last notable group were sectors that showed a lack of a clear "middle" relative to others: Financial Services & Insurance, and Professional Services sector associations both exhibit a relatively stark divide between large and small players.

Likewise, in Professional Services, 40% have fewer than 5, and the same number have greater than 31, while the remaining 20% fall somewhere in the 5-15 range - the size range that on average represents the most associations surveyed.

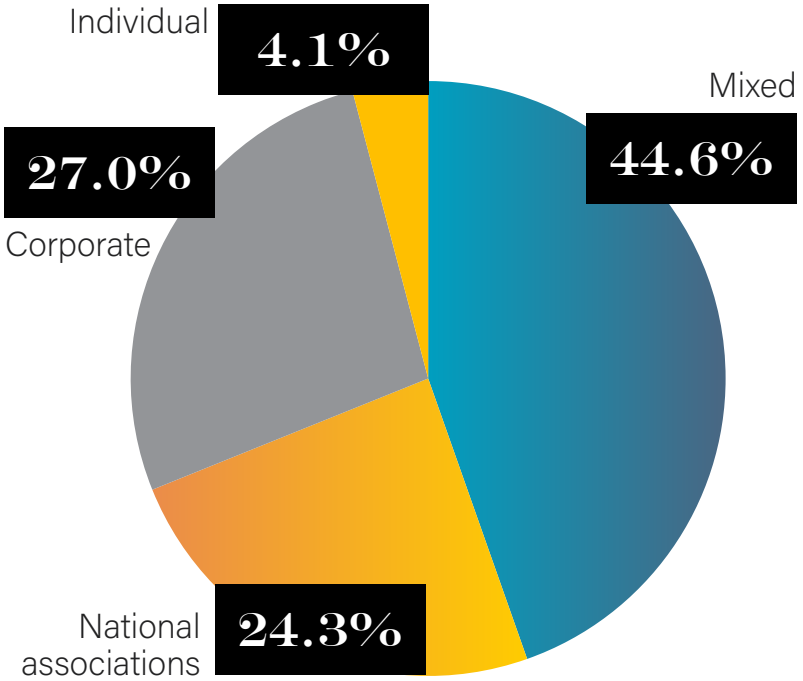


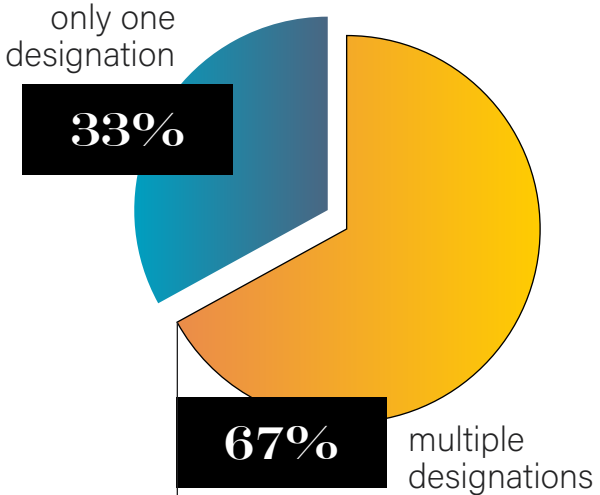
DID YOU KNOW?

Small, medium-sized, and large associations are represented almost equally in our sample pool. This diversity reflects not only the broad spectrum of issues that different organisations can cover depending on their remit and sector, but also the demands required of day-to-day consensus building alongside issue advocacy.

MEMBERSHIP COMPOSITION:

Looking exclusively at the European respondents, nearly half have mixed membership structures, with a majority of these following a similar set-up bringing together corporate members and national associations. There are some mixed membership associations, however, that also include NGOs, consultancies, universities, and public bodies or independent agencies, and which thereby represent exceptionally diverse platforms for discussion and exchange on issues of common interest, with implications for how the typical connection between voting rights and financial contributions operates in practice in these rarer cases.





AMONG THOSE WITH MULTIPLE DESIGNATIONS, FURTHER CLASSIFIED INTO:

- Regional
- Global
- Affiliate
- Observer
- Partner

DID YOU KNOW?

On top of the "full member status" which is the base across associations, close to 70% have an "associate membership" level, with 12.2% having an "observer" type category. In total, nearly a quarter have some sort of additional membership type, typically for affiliate, partner, or project-specific members.

MEMBERSHIP EVOLUTION:

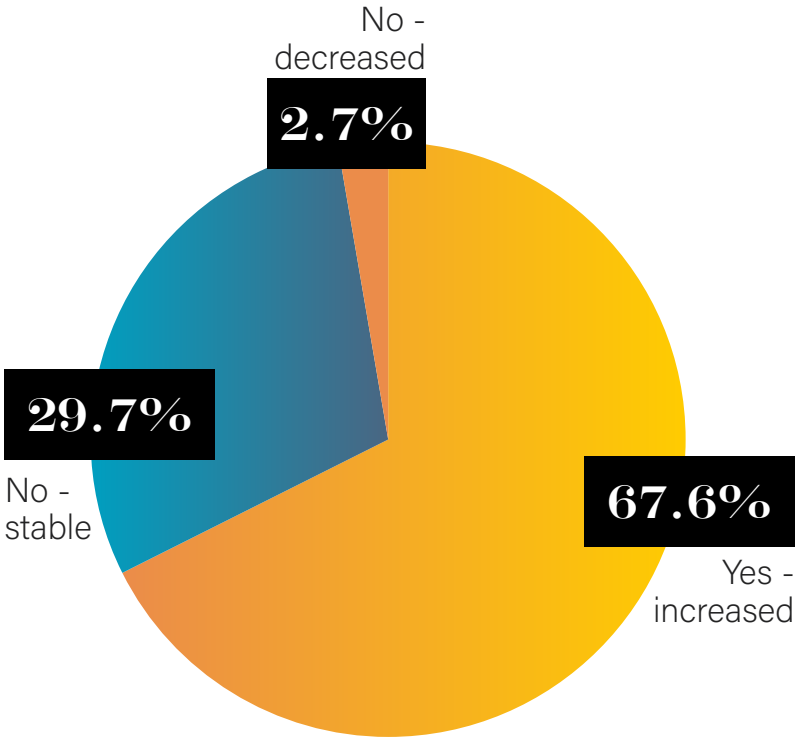
When asked to provide more detailed and individualised information on the trends they've seen in membership over time, association leaders offered insights into drivers of change as well as challenges, highlighting the kind of pressing questions they must navigate in their roles.

Some challenges can be geographic: dedicated growth initiatives targeting specific parts of the EU can be an important factor in ensuring more balanced distribution from underrepresented regions. They can also be geopolitical: some associations lost or suspended members from Russia and Belarus in response to Russia's 2022 invasion of Ukraine.

Conversely, closer EU-third country ties or even EU accessions can see sudden jumps in association memberships. New political mandates or increased drive to regulate in certain sectors can also convince potential members that up until now have been content to try and go it alone to reassess their level of engagement.

Finally, changes within the associations themselves can also influence membership trends: new services or a more robust offering to full members may drive interest, while the incorporation of a single larger member might bring along other members of their ecosystem or supply chain in their wake, shifting both the balance internally as well as the overall weight of the association externally.

Has your membership changed in the last 3 years?



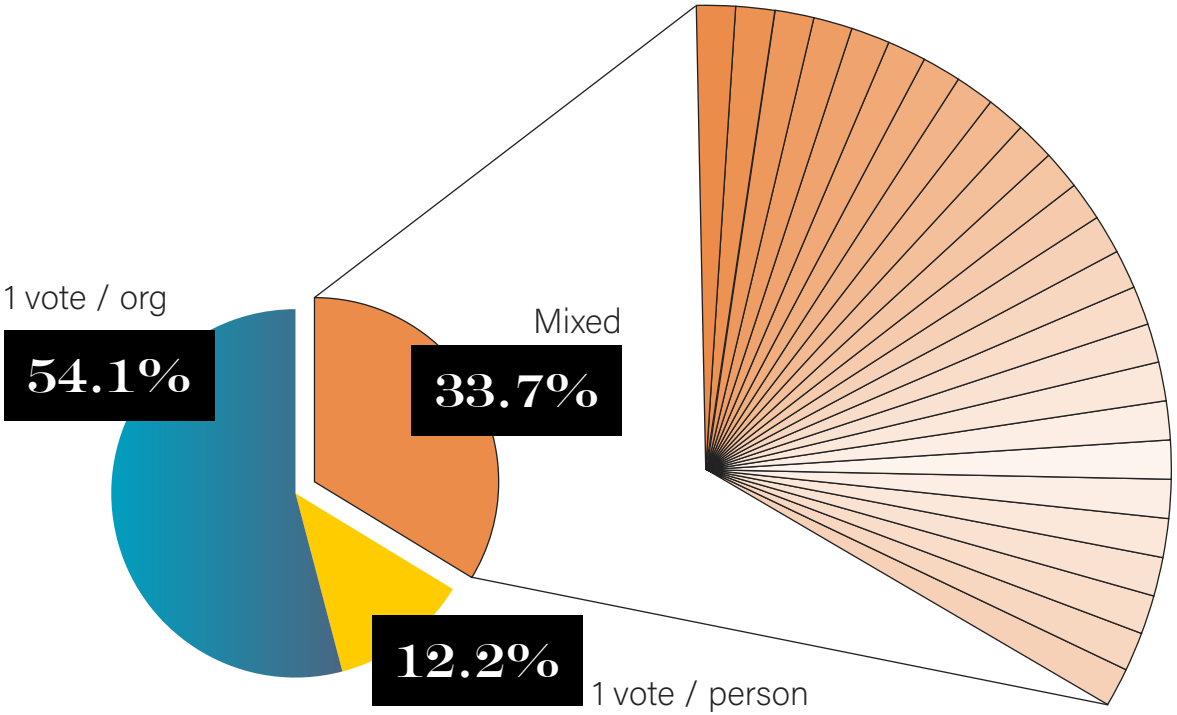
DID YOU KNOW?

67% of associations responded that they had seen their membership grow in the last 3 years. This was due in equal parts to proactive membership development efforts, as well as spontaneous expressions of interest – and in one case, an association made a note of distinguishing members which returned post-COVID. Conversely, fewer than 3% said they had seen it decline.

VOTING RIGHTS:

Our findings here are represented in two ways, to underscore the incredible – and frankly surprising – diversity in practices that emerge when delving into the intersection of membership and voting rights. In many mixed membership associations, the weighing of the votes differs by type of membership, e.g. national associations have a certain number of votes based on the market size, whereas corporate members based on the level of their financial contribution; sometimes it's 1 vote for each member but the big companies that dominate the market get 2 votes.

Whether through linking voting weight to organizational footprint and physical facilities, to headcount, turnover, and size of membership contributions, organisations which employ some kind of proportionality in their voting systems almost universally develop their own take on these approaches.



DIGGING INTO THE DATA

While a majority did adhere to some version of one-member-one-vote, in asking this question we gave respondents the opportunity to contextualise their answers, revealing nuance and individualisation that goes beyond the more straightforward prompts. Here are some of the unique answers they provided:

"1 vote per [X EUR] of membership fee, capped at 10 votes"

"National Associations have between 4 and 15 weighted votes based on market size; companies have 1-4 votes based on financial contribution"

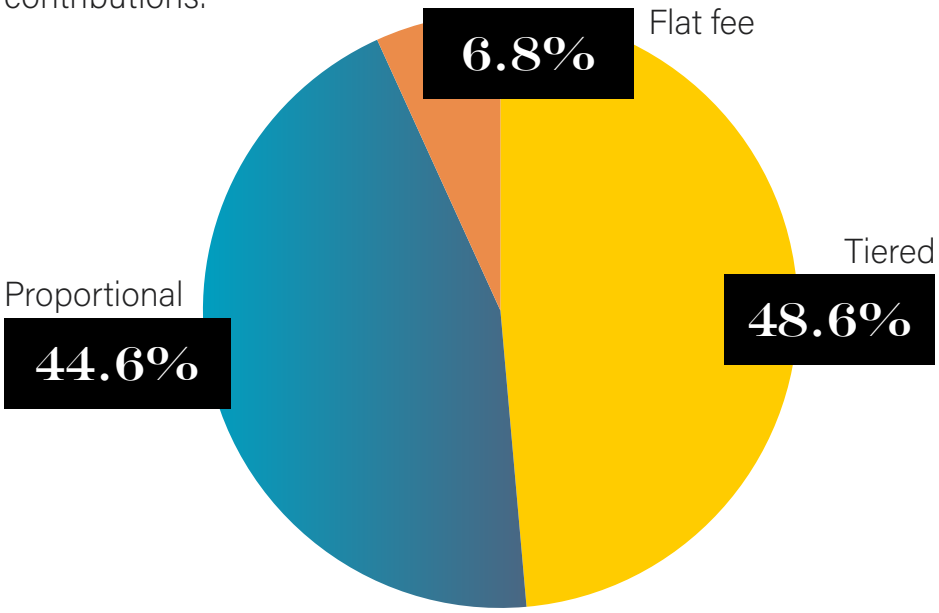
"Affiliate Members join for 2 years on a lower fee. They have no voting rights and become full members after 2 years. It's like a test membership."

"Full members have voting rights in the GA and Board; corporates and sector associations have voting rights in the Board only, not the GA."

MEMBERSHIP FEES STRUCTURES:

Given the insights already seen around membership structures and voting rights, it stands to reason that there would likewise be a link between status, influence, and fees. This is true – to some extent – but the picture is more complicated.

The financial responsibilities of full members can be determined in multiple ways. Just under 7% of associations surveyed have a flat fee for all members, and slightly less than half (48.6%) use a set tier structure per membership type, i.e differentiated, but at fixed levels or increments. The remaining 44.6% have proportional membership fees, typically based against a general set of parameters that attempt to ensure a proportionate framework for contributions.



DIGGING INTO THE DATA

As with voting rights, we asked association leaders to provide further details on what went in to their fee structures and how they applied to members, in particular where proportional fee frameworks or case-by-case decisions were involved. Here are just a few of the interesting approaches that leaders shared with us:

"Associate members have a flat fee, while full members have a flat fee plus a percentage of previous year turnover"

"One portion is a flat fee, the rest is calculated proportionally to the number of operating manufacturing sites in Europe."

"Everyone pays a minimum 3% of the [association's] costs, and the remainder is calculated upon market share."

"Pro rata production volume"

"Fees are calculated according to 3 categories with a fixed percentage for the largest members, a fee according to premium income for the middle category and a minimum fee for markets of a smaller size"

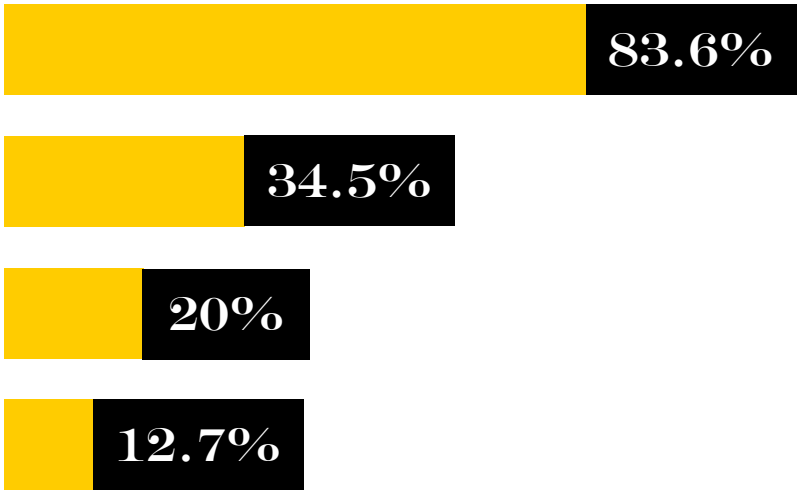
"We use 4 criteria: 2 internal and 2 external: GDP, country market cap, association budget, and size/ number of employees."

FEE REVIEWS & FACTORS:

80% of responses indicated that periodic fee reviews are the norm, which are essential in both adjusting tiers and assessing criteria for proportional contributions, as well as for accounting for shifting macroeconomic trends.

74% reported reviewing fees within the last 3 years, with both external and internal factors:

- Economic factors, e.g. inflation (83.6%)
- Evolving nature of the association's activities (34.5%)
- Industry-specific economic factors (20%)
- New association or secretariat services added (12.7%)

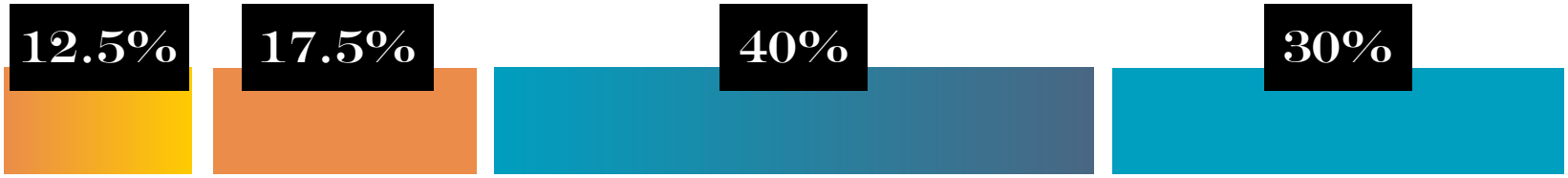


*submitting multiple answers per respondent were permitted

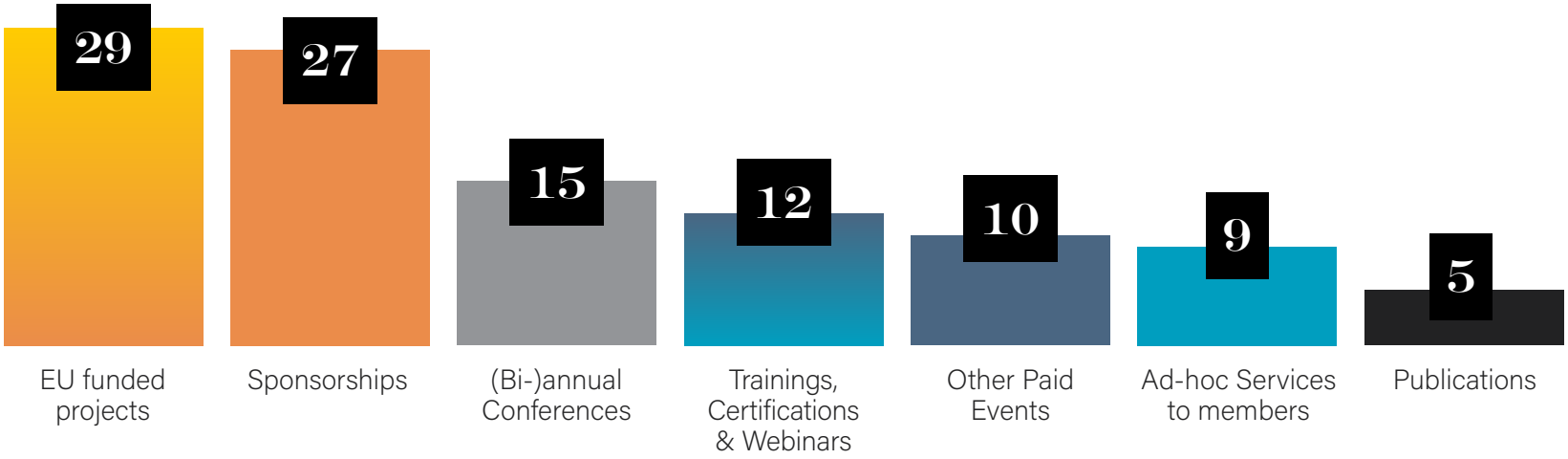
BUDGET:

The attention given to fee structures and membership contributions is essential for association leaders, in large part because of how vital they are to the organisation's overall budget.

The single most important source of an association's financing is through membership fees. For 70% of respondents, membership fees account for at least 80% of their association's overall budget.



For those associations which rely on alternate sources of funding to complement membership fees, EU funded projects and sponsorships remain the top choices.



KEY TAKEAWAYS

Nearly 70% of associations reported

that **membership fees account for more than 80% of their budget**,

with **nearly 30% deriving 100%**

exclusively from membership contributions.

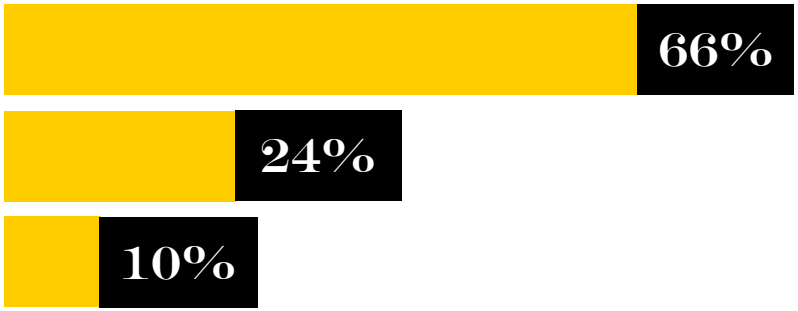
Altogether, **87.5%** of associations surveyed derive **at least half** their budget from membership fees.

GOVERNANCE:

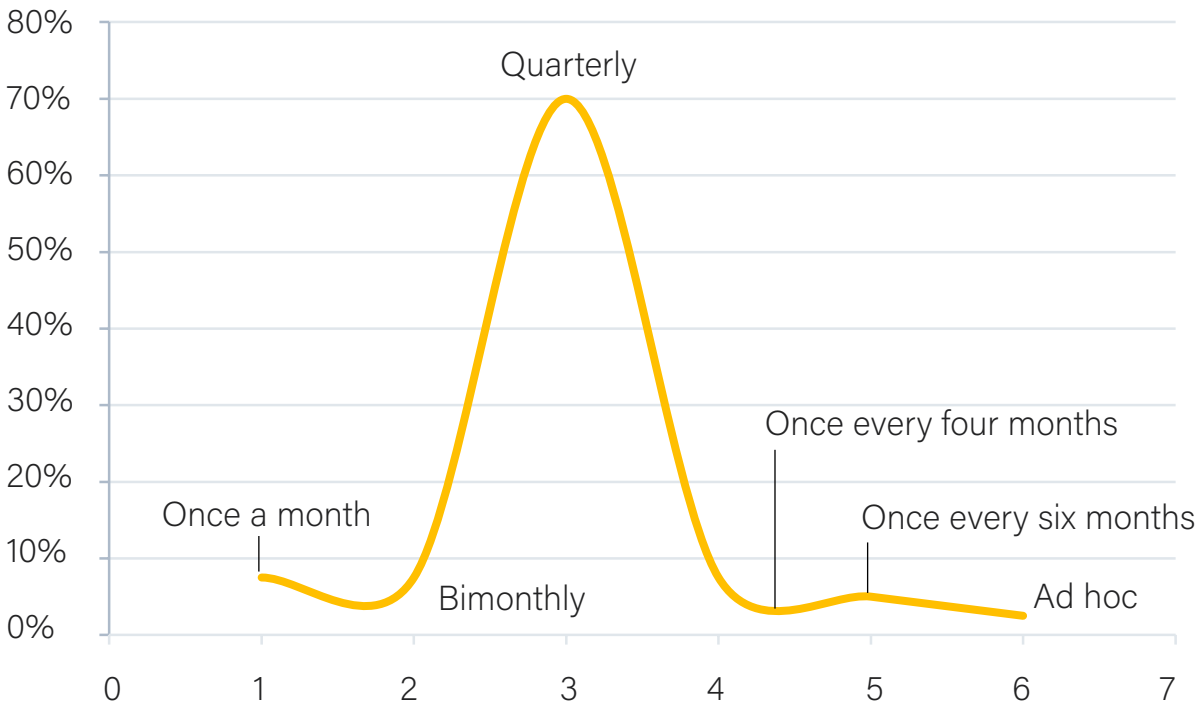
While there are many nuances to governance, association boards do tend to have certain characteristics in common:

- based on the responses received, in **66%** of cases Board Members are nominated,
- in **24%** of cases Board Members are chosen based on a selection process, and
- in **10%** of cases their seat is secured ex officio.

In terms of tenure, a majority hold their seats for a period of 2 – 4 years, and most often meet quarterly: less than 15% meet more often, with a similar number meeting fewer than 3 times a year.



Frequency of Board Meetings

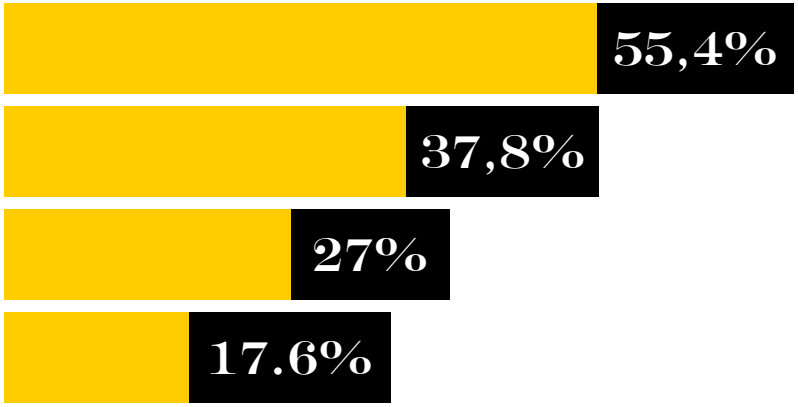


BOARD SELECTION:

Selection criteria varies and can highlight nuances within particular associations:

- **55.4%** highlighted the importance of balancing Board representation between national associations and corporate members,
- **37.8%** emphasised geographical representation as a factor
- **27%** considered specific competencies
- **17.6%** took demographics such as age and gender into account.

In some cases, Board composition is part and parcel of membership. For those that have a selection process (24%, from previous page), when asked about selection criteria and given the opportunity to select any which apply or supply their own, these were the most frequent responses.



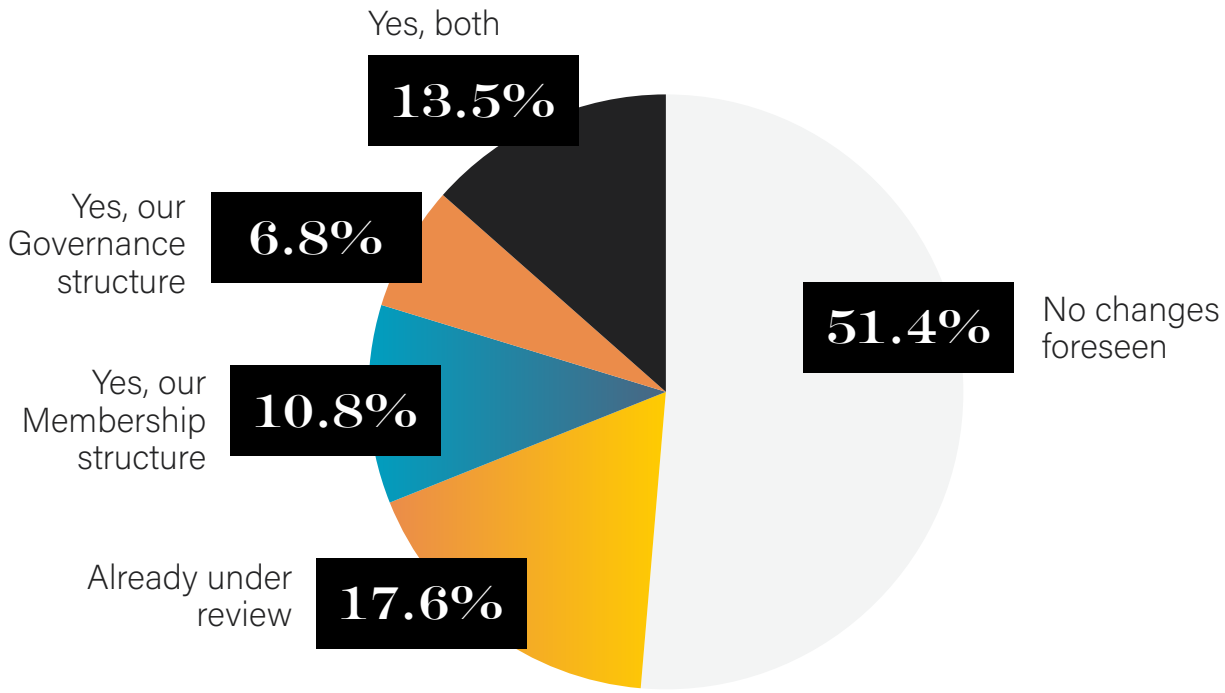
DID YOU KNOW?

One particularly interesting finding was that 12% looked at "personality balance" as a criterion for selecting Board members.

PLANNING FOR THE FUTURE:

We asked Association leaders to look ahead and determine whether they intended to review their **organisational structure, membership, or governance models** in the coming years due to changes in the market or political landscape.

Nearly half said yes, **with over a dozen organisations already undergoing long-term reevaluations**, and almost the same number planning both membership and governance reviews in the near term.



CONCLUSIONS

At the outset of this study, our Mavens sought to provide a comprehensive snapshot of the current landscape of association governance. Having examined the nature of membership and management, the diversity of approaches adopted across sectors, and the complexity that exists within even this particular cross-section of the expansive association world, we have managed to accomplish this in ways that have been informative and, at times, surprising.

Our findings underscore the increasing significance of associations on the international stage, underpinned by a clear trend of membership growth among the majority of respondents. At the same time, the ongoing review and adjustment of membership fees reflect both the evolving nature of associations, as well as the rising expectations placed upon them by their members and stakeholders.

Strikingly, the prevalence of multiple and diverse membership categories point to the intricate web of relationships that associations must manage. These interconnections between key stakeholders reinforce the need for robust and flexible governance structures that can respond to changing demands.

These are reflected in the diversity of governance structures, and the unique approaches developed by many associations - particularly in their efforts to diversify budgets, which remain highly dependent on membership fees - indicate that there is still ample room to further professionalise the sector and to embrace more innovative solutions.

Mavence and ESAE are committed to supporting associations in strengthening their governance, effective management, and enabling sustainable growth. Looking ahead, we will continue to unpack the core themes highlighted in this report through a series of articles, events, and studies, which will further explore growth and evolution in these key areas. Together, we look forward to shaping a more resilient and forward-thinking association sector.

Anna Koj, Managing Director Mavence Brussels

WANT TO GET THE FULL PICTURE?

Follow our Mavens and get in touch to be among the first to receive the full survey report, with insights on the findings above and more.

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