

WHITEPAPER

Benchmark Report: Small-Staff Associations

Insights and tips to help your small association grow



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Surveys conducted by: Edge Research



Overview and key findings

For nine years, Momentive Software (formerly Community Brands) has conducted surveys to uncover insights into the behaviors and viewpoints of association members and professionals. This report offers insights pulled from the 2024 Association Trends Study about trends that impact small associations – those with annual revenue of less than \$5 million.

It shows that both small and large associations face significant challenges. And, it offers insights into how your small association can work more efficiently, boost member engagement, increase revenue, and advance your mission.

A few notes about the 2024 Association Trends Study

This report is based on parallel surveys conducted with 1,005 members of professional membership organizations in the United States and 211 professionals who work at those organizations (referred to in the report as “Members” and “Pros,” respectively). The online surveys took place between June 20, 2024, and July 18, 2024. In the report, “small organizations” refers to organizations with annual revenue of less than \$5 million. “Large organizations” refers to organizations with annual revenue of \$5 million or greater.

Key findings:



Small associations’ focus could pose a risk to their top goals

The top priorities for small associations are increasing membership and improving membership retention. However, small associations place less emphasis on areas including upgrading and/or integrating new technology and driving innovation – which are key areas that impact member engagement and the member experience. They also undervalue some benefits that are most important to members, especially in the area of career advancement.



Small associations feel technologically unprepared for the future

Few association professionals say their organization has a digital council, formal digital transformation plan, nor a policy for artificial intelligence (AI). In these key areas, small organizations are less technologically prepared than large ones.



Few small associations are using technology to the fullest

Association professionals from small organizations are less likely than those from larger ones to agree that technology is transforming their organization for the better and more likely to agree that not keeping up with the pace of technology is holding their organization back.

Top priorities for small associations

The top priorities for small associations are putting on successful events, increasing membership, and improving membership retention. They place less emphasis on areas including upgrading and/or integrating new technology and driving innovation – which are key areas that impact member engagement and the member experience.

Importance of each for small associations (top priority / important)

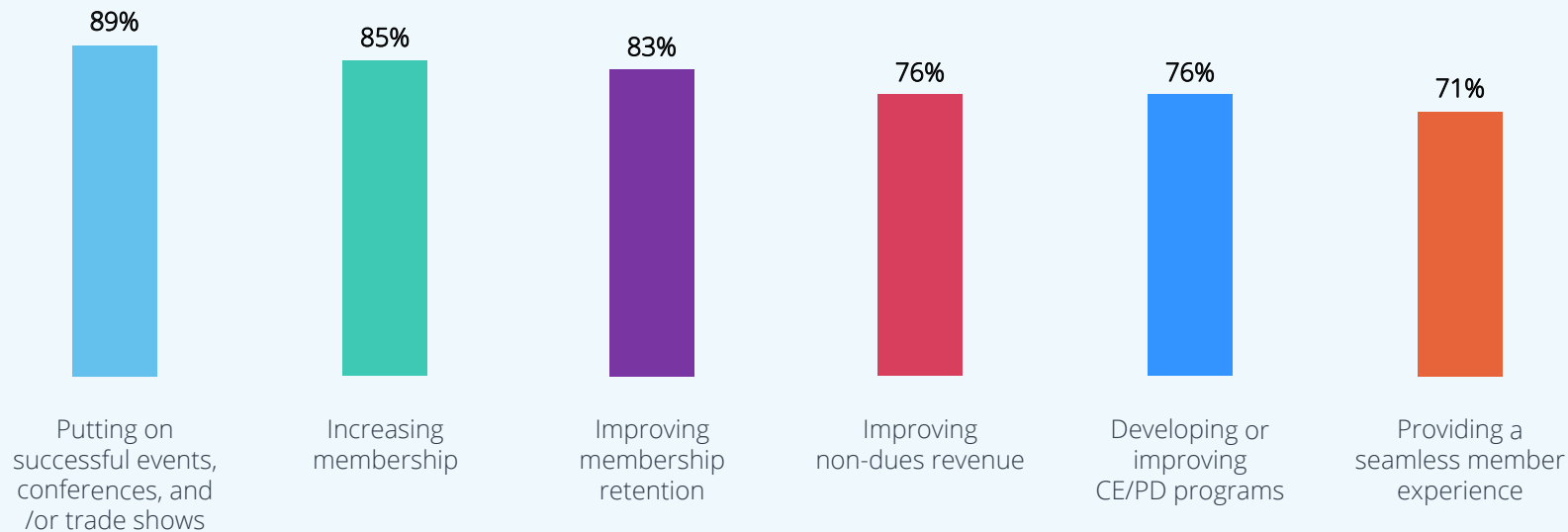
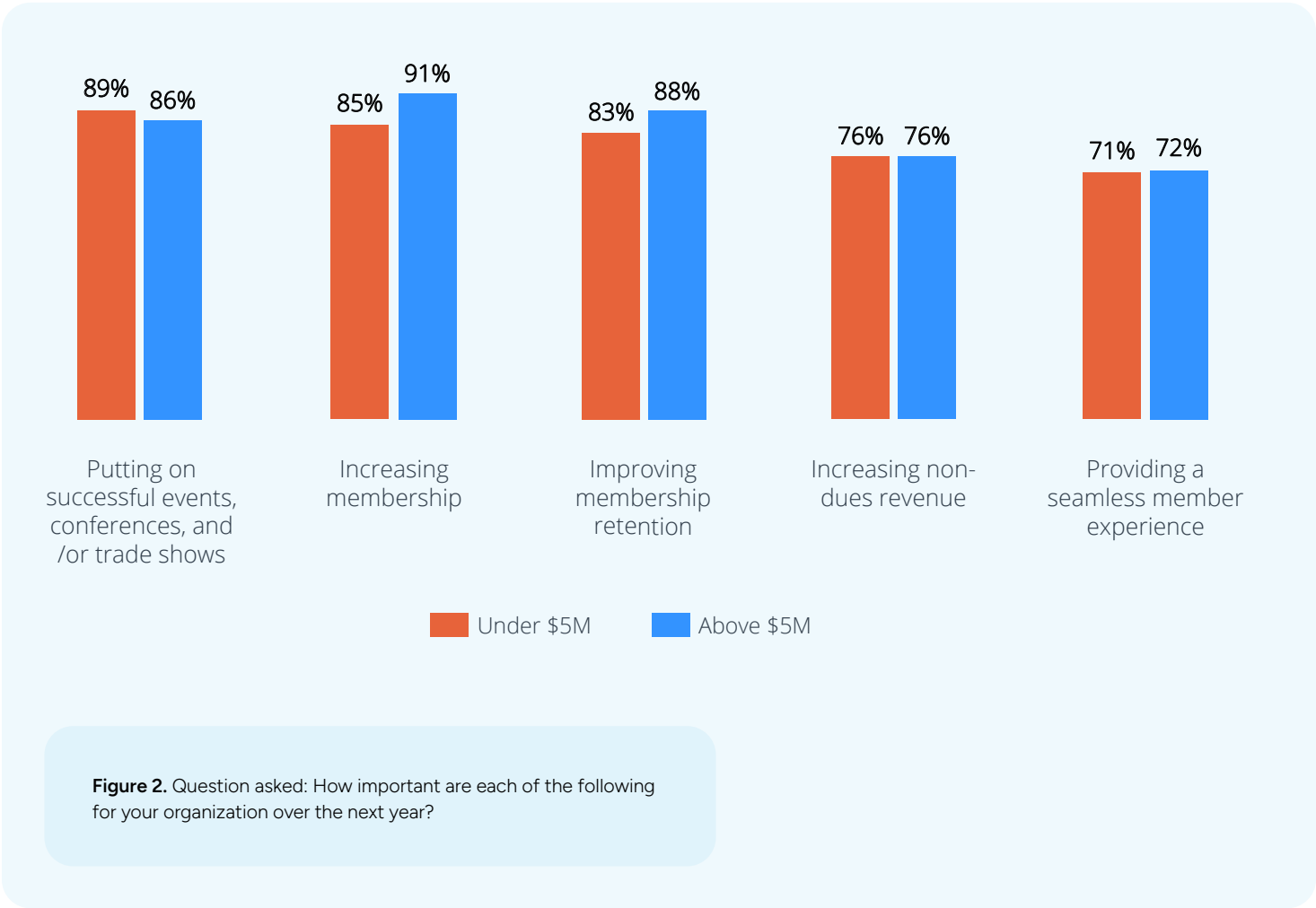


Figure 1. Question asked: How important are each of the following for your organization over the next year?

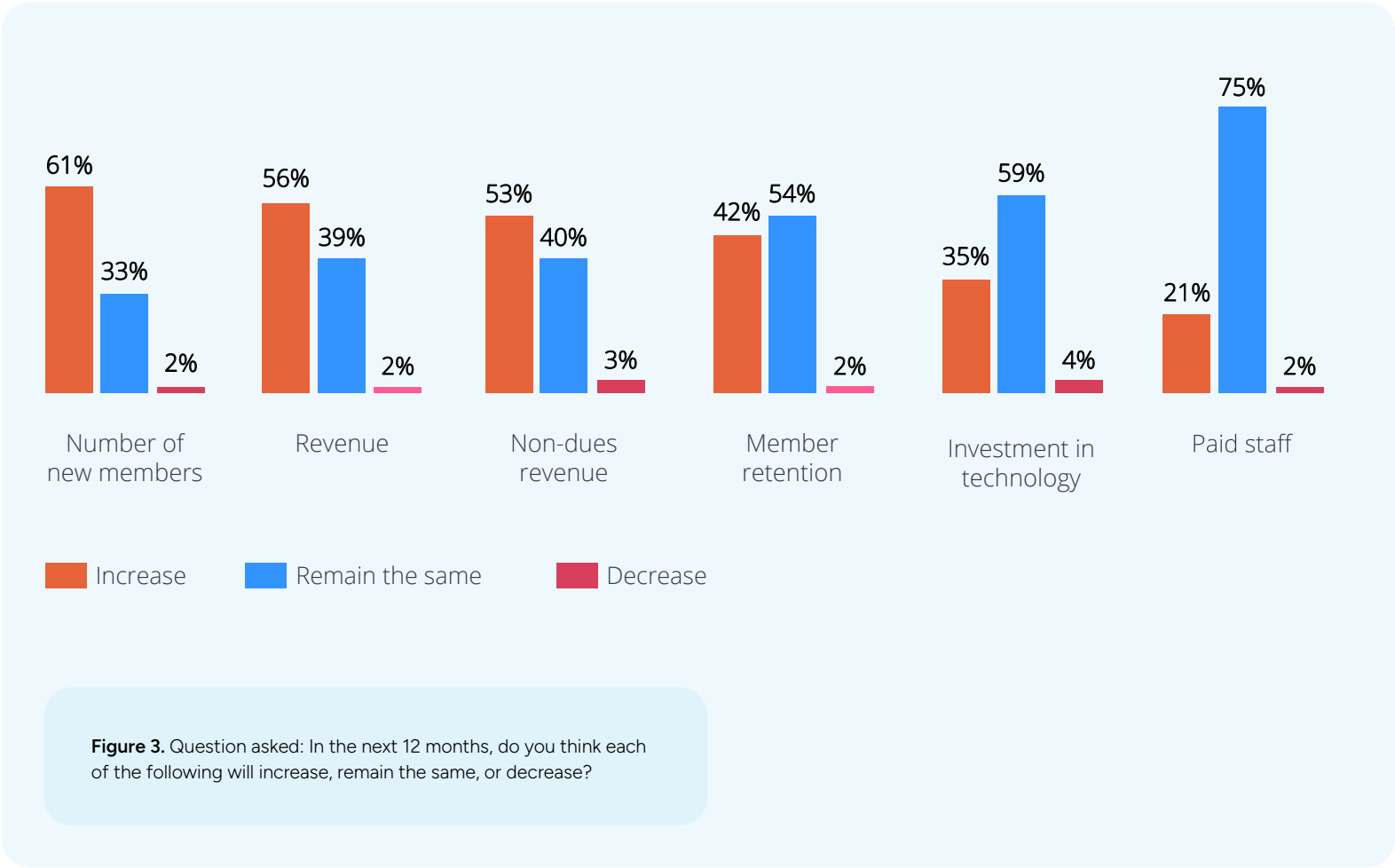
The priorities of small associations (revenue of \$5 million or less) are similar to those of large associations (those with revenue over \$5 million). Both put a large emphasis on events, membership, and non-dues revenue.

Importance of each for small and large associations (top priority / important)



When asked about the next 12 months, small associations are more optimistic about member acquisition and revenue than they are about member retention.

Expected changes in small associations in the next 12 months



How small associations are meeting member needs

As previously mentioned, meetings/conferences/tradeshows top the list of priorities for professionals at small associations. Yet, in the 2024 Association Trends Study, when Members and Pros from all organization sizes were asked to rate the importance of key benefits provided by their organization, Members place greater importance on areas including job opportunities, keeping up with the latest industry technology, help with career advancement, professional standards, certifications, and training.

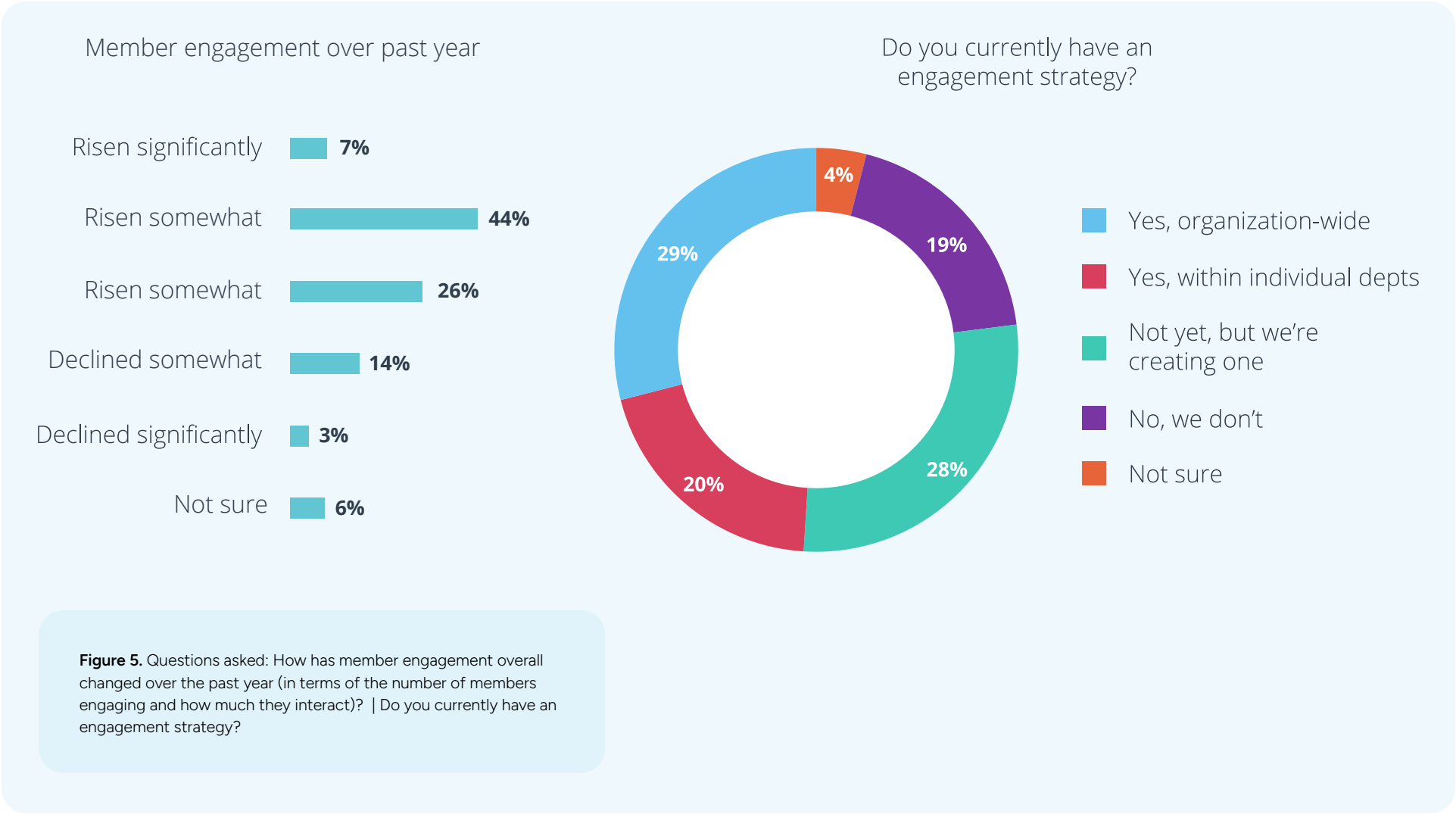
Figure 4. Questions asked: Below is a list of benefits that being a member of a professional membership organization might provide. For each, please indicate how important that benefit is to you. | Below is a list of benefits that a professional membership/trade organization might provide to its members. For each, please indicate how important you feel that benefit is to your organization's members. Would you say it is...

Top 14 important benefits (viewpoints of Members and Pros from all organization sizes)



About half (49 percent) of small associations report having a member engagement strategy, while a quarter are in the process of developing one. Half report that their member engagement is on the rise, while the other half are facing stagnant or declining member engagement – this aligns with the 49 percent who report currently having an engagement strategy either at the department or organization level.

Organization’s member engagement strategy status (Pros’ perspective)



Small associations and technology

Majorities of professionals from small associations agree that technology is transforming their organization for the better and that professional organizations that don't transform technologically within the next few years won't survive. Yet nearly half (49 percent) say that not keeping up with the pace of technology is holding their organization back.

A comparison by organization size indicates that professionals from small organizations are less likely than those from large organizations to agree that "Technology is transforming my organization for the better," and more likely to agree that "Not keeping up with the pace of technology is holding my organization back."

Sentiments about technology (Pros' viewpoints)



Figure 6. Question asked: How much do you agree or disagree with each of the following statements? (agree strongly/somewhat)

Only five percent of Pros from small associations say they feel very technologically prepared for the future.

How technologically prepared Pros feel for the future

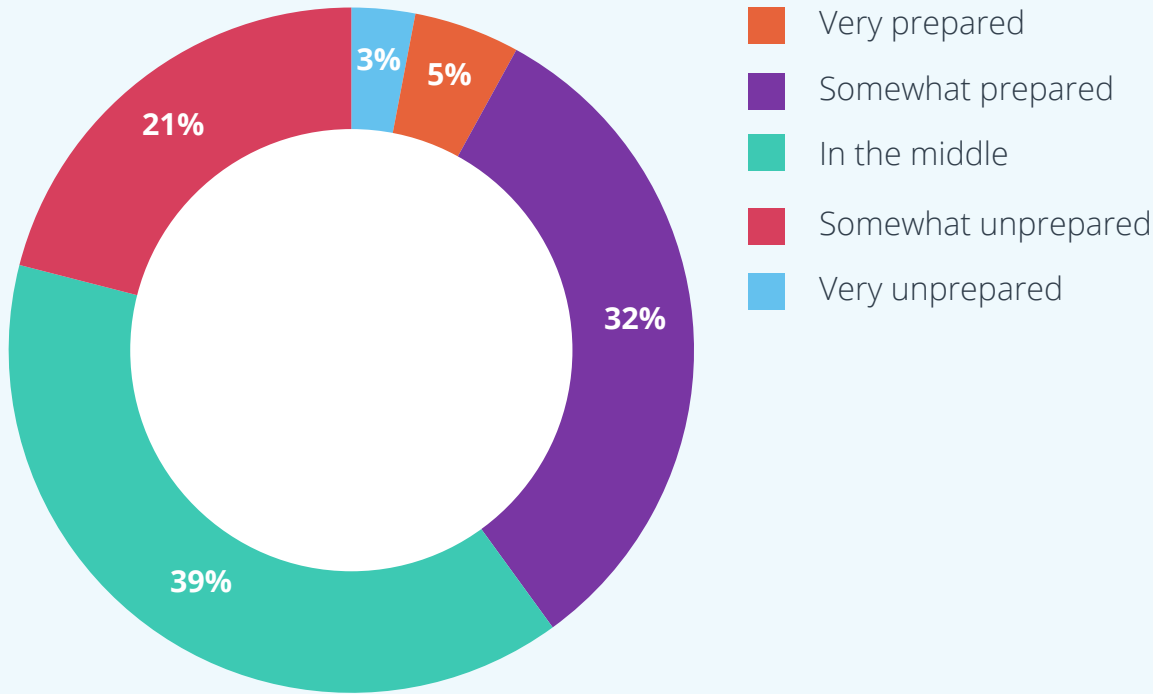
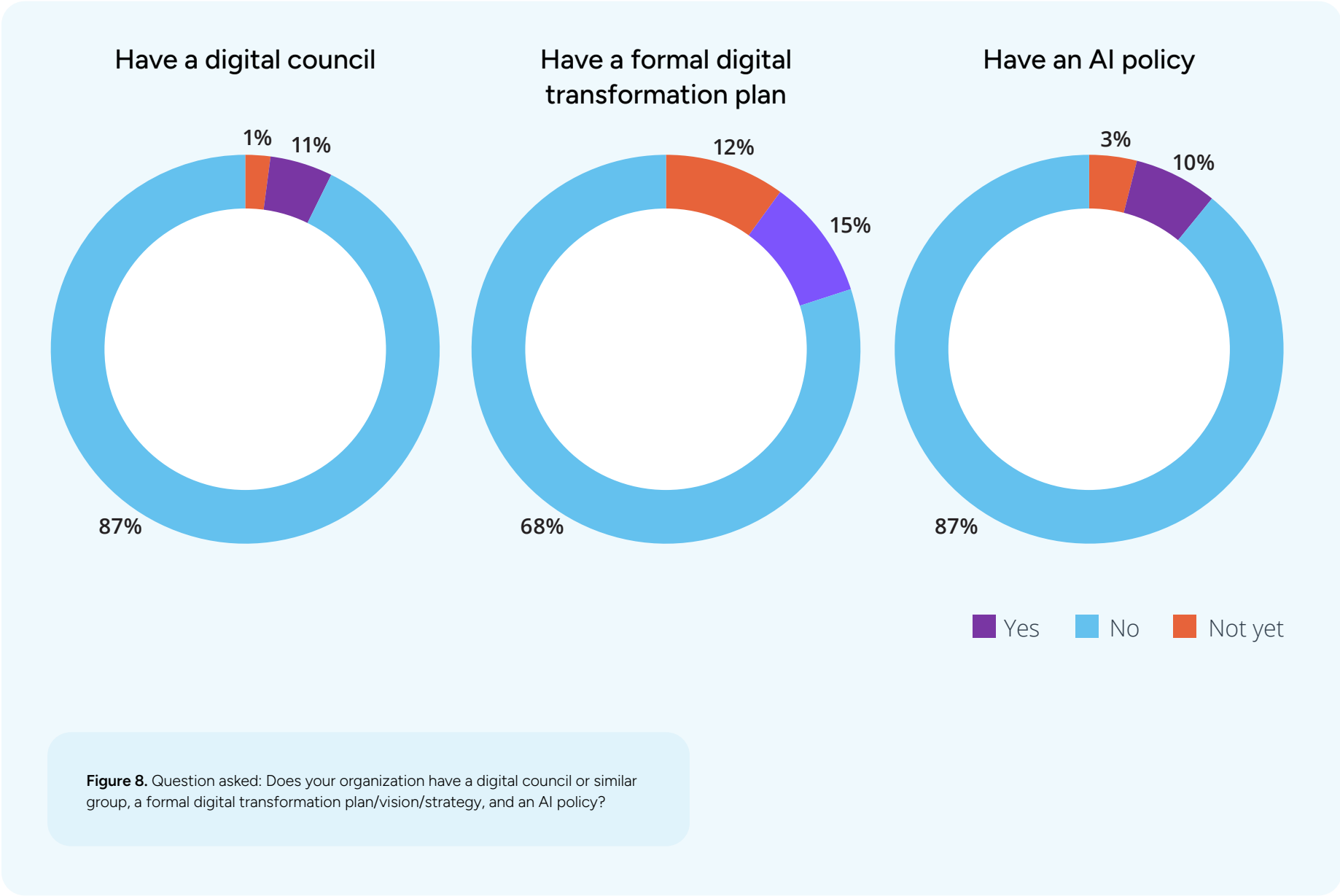


Figure 7. Question asked: How technologically prepared do you feel your organization is for the future?

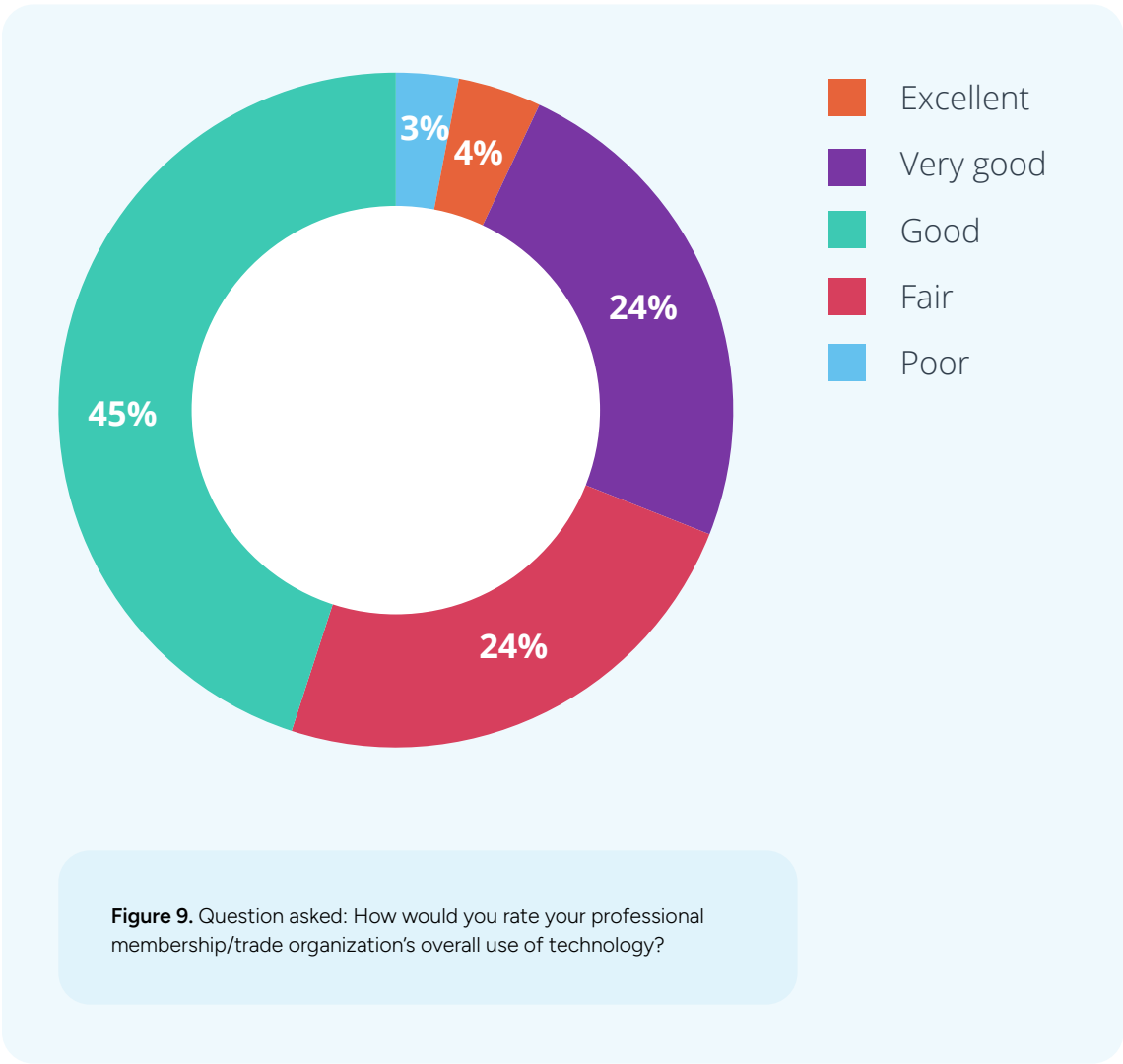


That's perhaps not surprising, considering that few professionals from small organizations say their organization has a digital council, formal digital transformation plan, nor an AI policy. In these areas, small organizations are less technologically prepared than large ones.

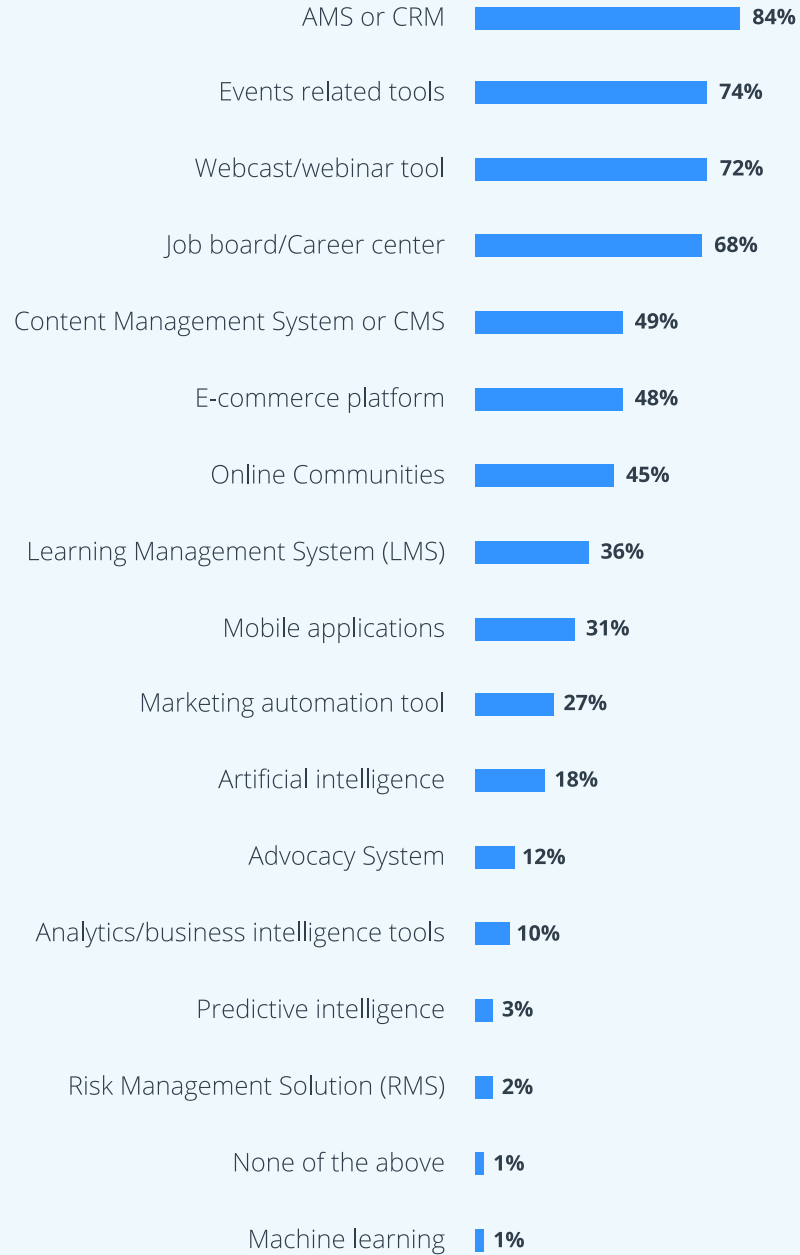


In addition, less than a third of small associations rate their organization’s overall use of technology as excellent or very good.

Technology usage by organization (Pro viewpoint)



Technology/solutions used



In terms of what technology they are employing, small associations report using association management software (AMS), event related tools, and webcast/webinar tools the most.

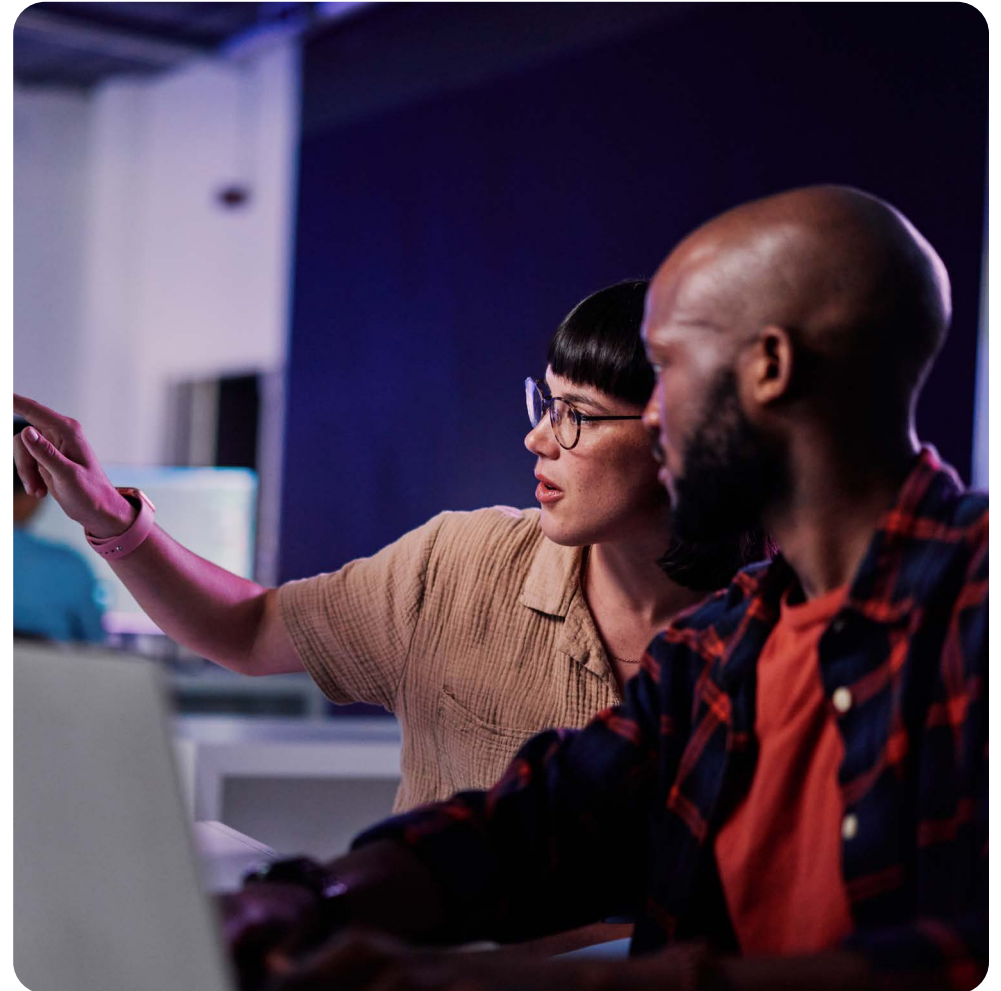
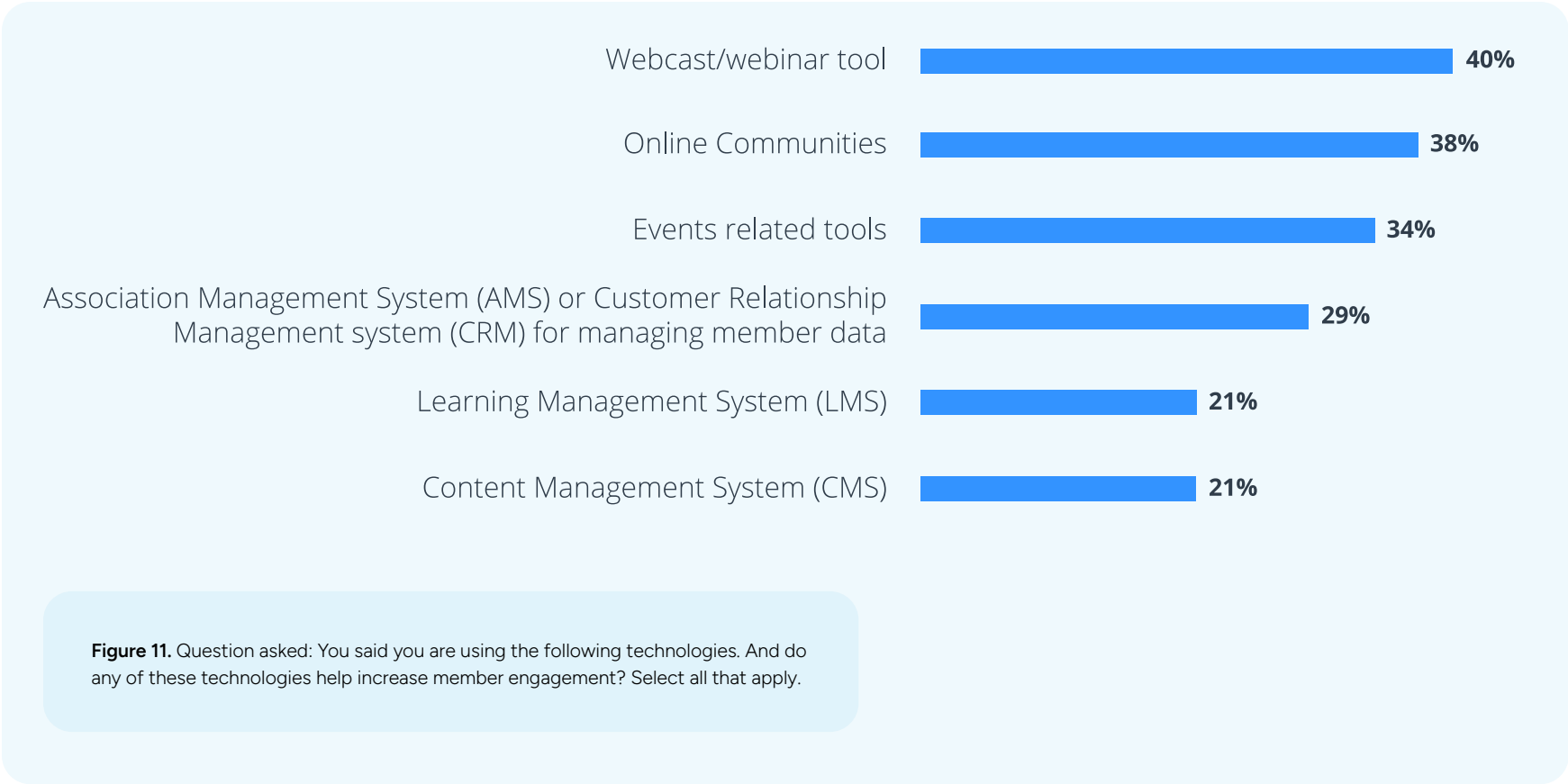


Figure 10. Question asked: Which of the following technologies/solutions does your organization use? Select all that apply.

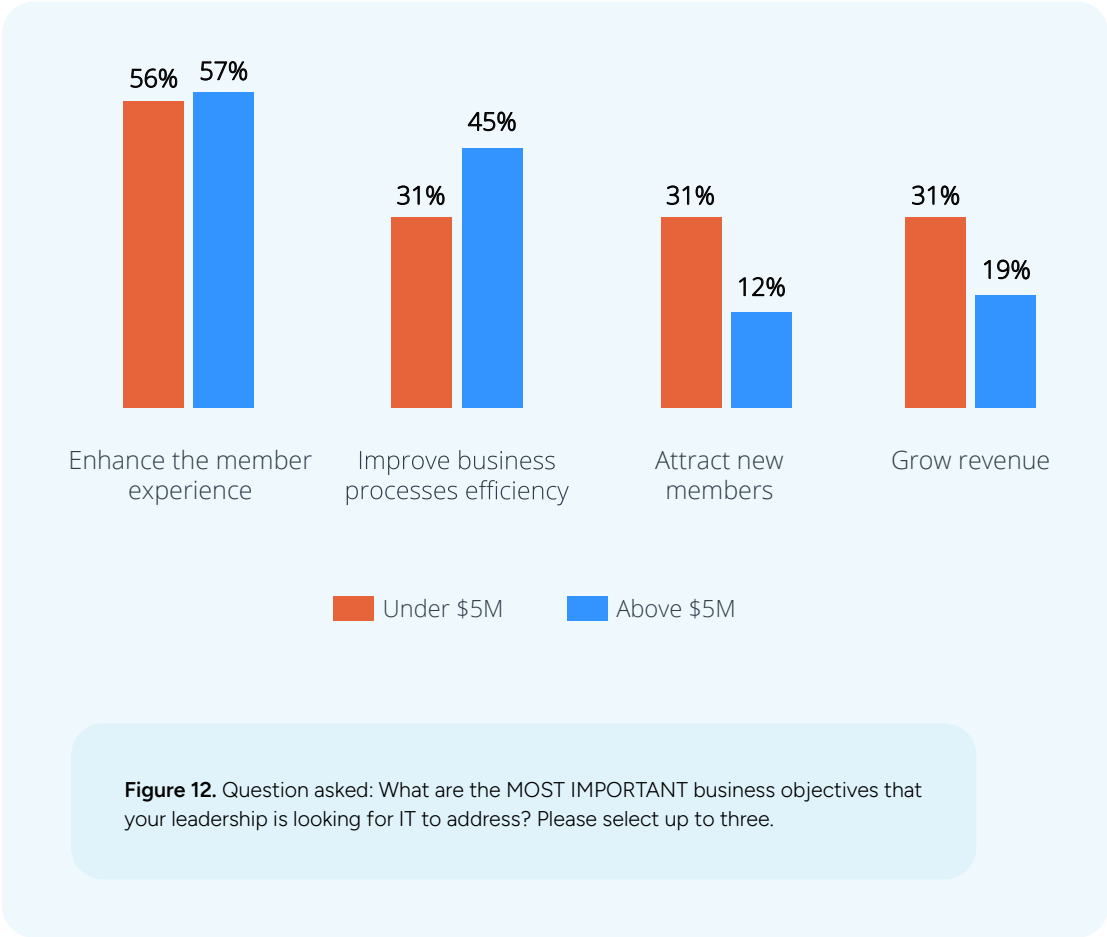
More specifically, to engage members, the top technologies small associations are using include webcast/webinar tools, online communities, events related tools, association management software (AMS) or customer relationship management (CRM) software.

Top technology to increase member engagement



Small associations see enhancing the member experience, improving business process efficiency, attracting new members, and growing revenue as top business objectives for their tech team to address. Compared with large organizations, small organizations place less emphasis on improving process efficiency and more emphasis on attracting new members and growing revenue.

Business priorities for technology purchases at small and large associations



Greatest technology challenges

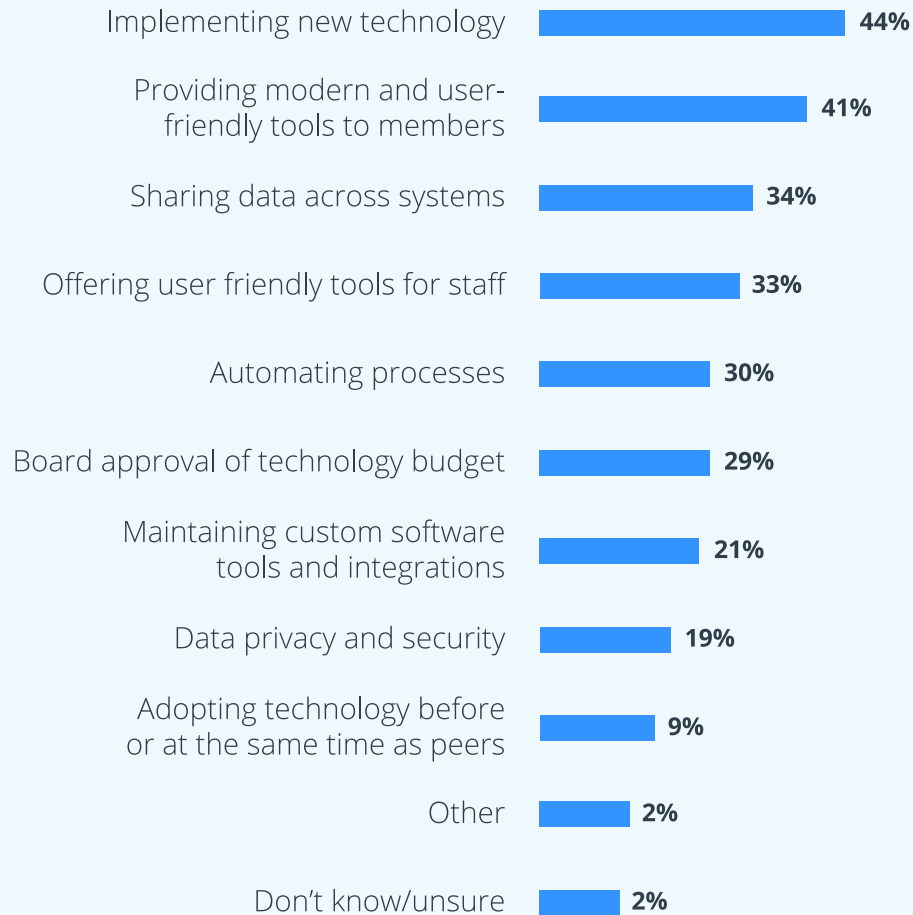
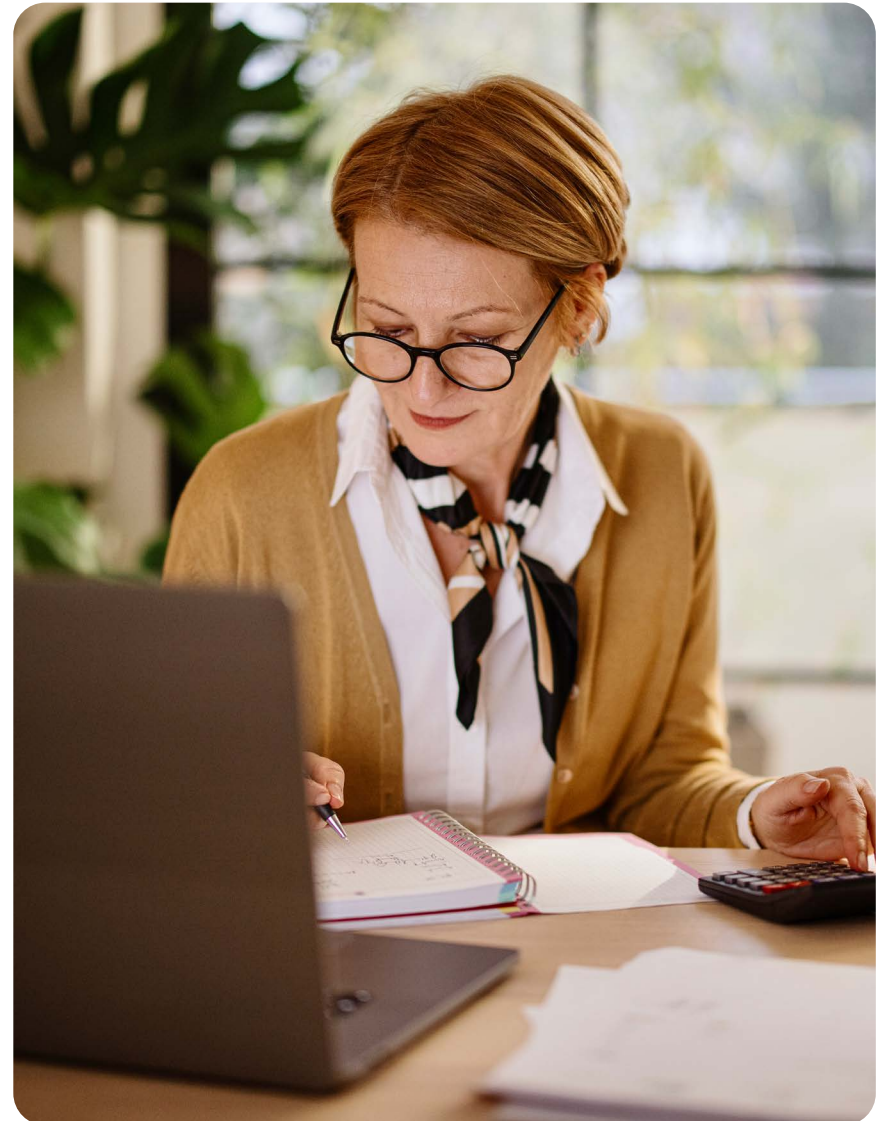
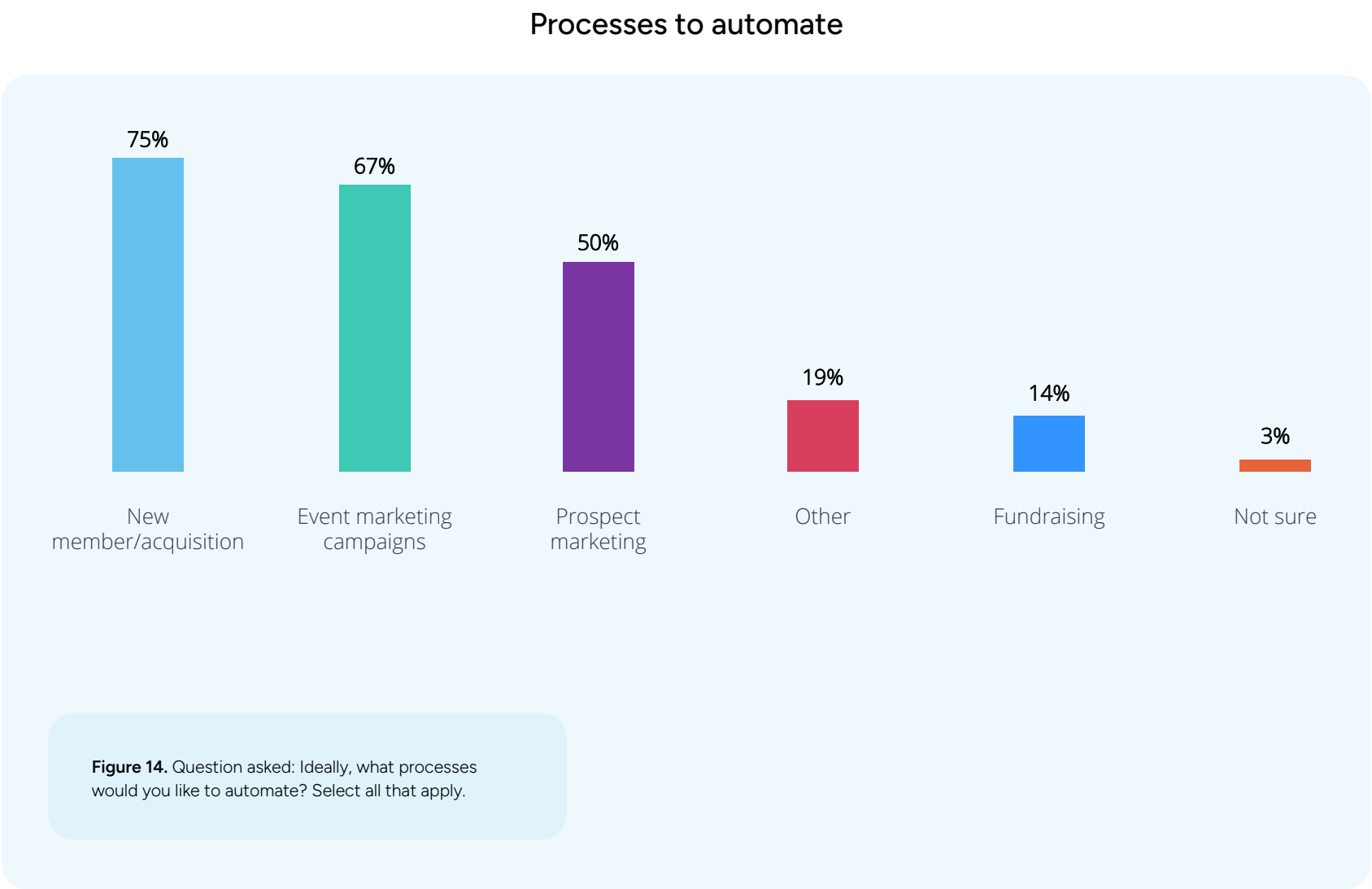


Figure 13. Question asked: And which of the following best represents the greatest technology challenges for your organization? Please select up to three.

Small associations report that their top technology challenges are implementing new technology, providing modern and user-friendly tools to members, and sharing data across systems. In comparison with large organizations, small ones struggle more with implementing new technology and gaining board approval of new technology budget.



For the processes they would be interested in automating, small associations rate new member campaigns and event marketing campaigns highest.



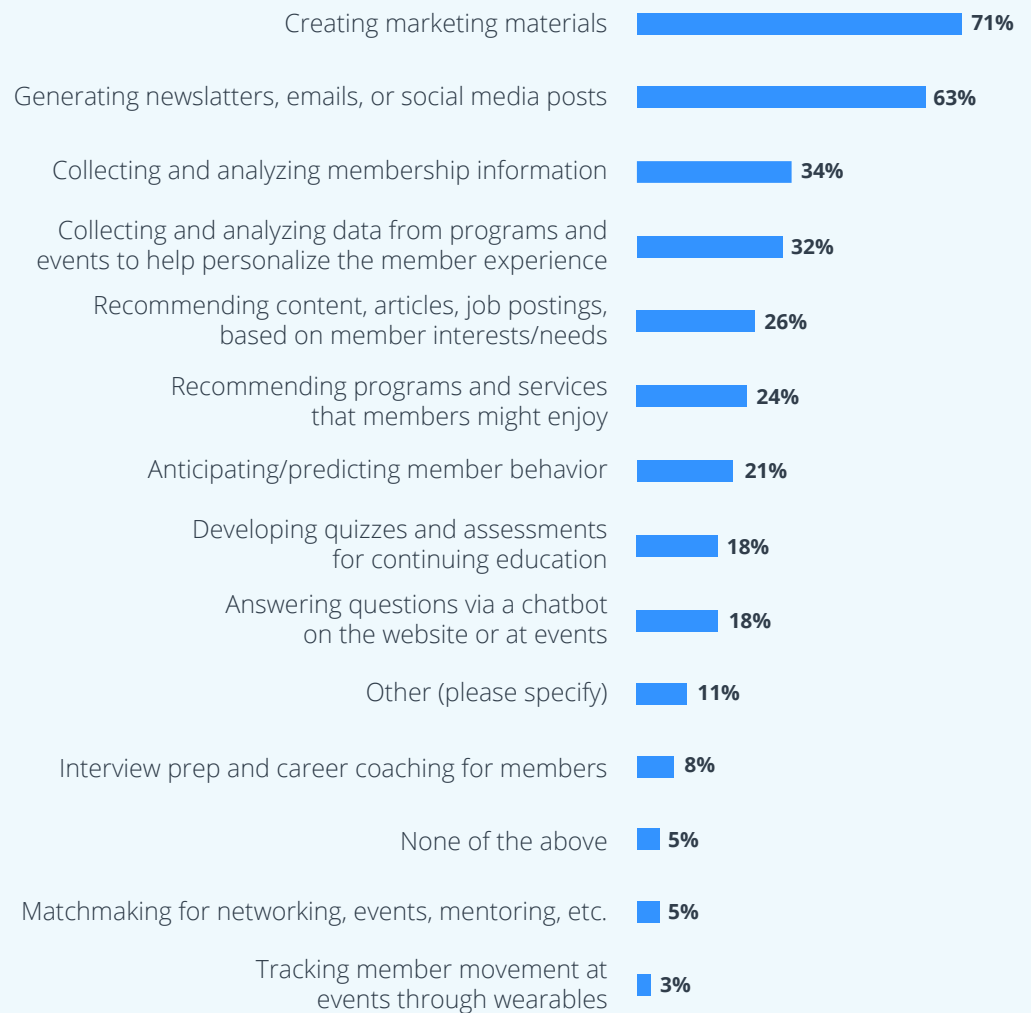
Spotlight on Artificial Intelligence

This year's Association Trends Study took a look at the growing area of AI. When looking at all sizes of organizations, few association professionals say their organization is using AI. For those that are using AI, the top ways they're putting AI to work is in creating marketing materials and generating newsletters, emails, or social media posts.



Figure 15. Question asked: In which of the following ways is your organization using artificial intelligence? Select all that apply.

In which of the following ways is your organization using AI?



Responses to the study also indicate that associations' boards may be hesitant to move forward with AI. Sixty-three percent of boards for small associations have not discussed AI or are still determining their organization's use of AI.

Which of the following best describes your board's position on the use of AI by your organization?

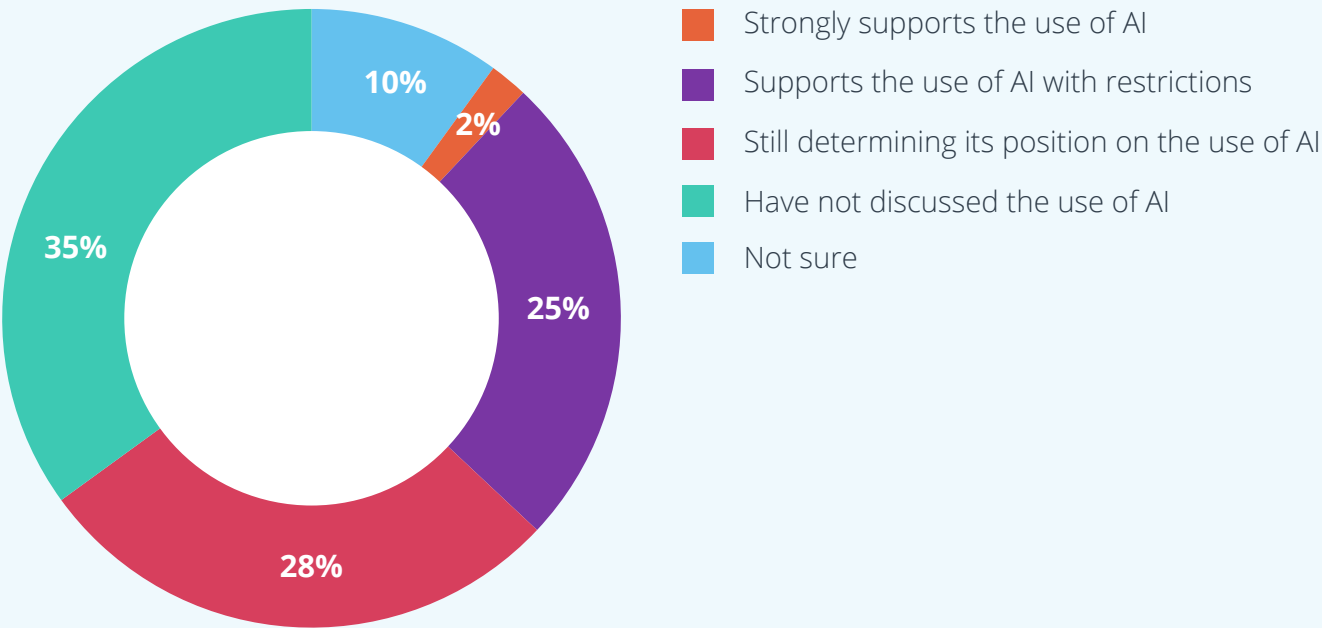


Figure 16. Question asked: Which of the following best describes your board's position on the use of AI by your organization?

Where to go from here: 3 tips for small associations

Your association's staff may be small, but you still have big opportunities. Here are three tips on how to use data from this report to more effectively meet your strategic priorities and grow your association.

1. Close gaps in member value to grow membership and improve retention

This report shows that top priorities for small associations are putting on successful events, increasing membership, and improving member retention. Yet there are multiple areas in which small associations undervalue some of the benefits that are most important to members – especially when it comes to career advancement. Small associations also place lower emphasis on areas that impact member engagement and the member experience, including upgrading and/or integrating new technology and driving innovation.

Providing your members with more of the career-building resources they seek will demonstrate greater member value, leading to greater member engagement and loyalty. Plus, using modern technology can make it easier to deliver the value members seek.

Here are some ideas for using modern technology to help close the gaps in member value:

- ✓ Use job board software to create an online career center that gives members the resources they need to grow professionally, including industry-specific career advice, online career coaching, career insights, city-specific data, an online career planning tool, and a mentor board.
- ✓ Use a modern learning management system (LMS) to help you deliver year-round high-quality online professional educational experiences.
- ✓ Offer an online community to help members connect with each other and grow their network of contacts in your industry (helping them to further their careers) and to help you keep members more engaged with your organization (leading to greater member loyalty).
- ✓ Use association management software (AMS) that integrates with your job board, LMS, and online community to create more cohesive and valuable member experiences that drive member acquisition and engagement.

2. Prepare (technologically) for the future

Only five percent of small associations feel technologically prepared for the future. To move more confidently into the future, give your tech strategy a boost.

For example:

- ✓ Build a digital council, or a team within your organization that can connect, collaborate, learn, and share ideas about how to incorporate modern tools, such as an AMS system, an LMS system, and an online job board to help you manage member data more efficiently, streamline work, and provide a modern member experience.
- ✓ Incorporate AI into your plans. Document some of the ways AI can help you work more efficiently -- such as more quickly generate content and deliver 24/7 customer service. Also, start discussions about AI with your board and begin to develop an AI policy that is consistent with your organization's security, privacy, and technology standards.
- ✓ As you work on your tech strategy, turn to your members who are early tech adopters for input. They can help you develop a technology strategy that keeps up with your members' needs and expectations.

3. Amp up your use of technology

Nearly half (49 percent) of small associations say that not keeping up with the pace of technology is holding their organization back.

Here are some examples of how to take your use of technology up a notch:

- ✓ Reduce technology costs
The cost of technology is a top priority for new tech purchases for small associations. Consider moving to an all-in-one AMS solution that is built for small associations, which reduces the number of systems you must pay for and maintain. Also, opting for an AMS solution that is hosted in the cloud means you won't have to install software or pay for costly upgrades.
- ✓ Refresh your website
Make sure your website is modern and updated so that your organization appears relevant and more attractive to members and prospective members. Use a website editor that makes it easy to create, edit, and design pages with no technical skills needed.
- ✓ Improve efficiency using process automation
When you simplify and streamline your association's day-to-day operations, it frees valuable staff time so they can focus more on attracting new members and creating a great member experience. Use software that helps you easily automate manual processes so your small staff can get more done.

Put the insights from this study into practice

Learn how Momentive Software can help your small association grow and thrive.

Let's chat

Research methodology

Commissioned by Momentive Software, formerly Community Brands, Edge Research conducted an online survey of 1,005 U.S. Members who self-reported they are 18 years old or older and are currently a member of a professional membership organization. Survey respondents were recruited through an online non-probability sample, meaning findings are not projectable to the larger population of members. The term "Members" refers specifically to those who were surveyed. Quotas were set so the survey is representative of key demographics. A parallel online survey was conducted among 211 professionals who work in these types of organizations. Survey respondents were recruited using Community Brands lists and online panel providers, which, too, is a nonprobability sample. The terms "Professionals" or "Pros" refers specifically to those who were surveyed. The surveys were in the field during June and July of 2024.



About Momentive Software, formerly Community Brands

Momentive Software (formerly Community Brands) amplifies the impact of over 30,000 purpose-driven organizations in over 30 countries. Mission-driven organizations and associations rely on the company's cloud-based software and services to solve their most critical challenges: engage the people they serve, simplify operations, and grow revenue. Built with reliability at the core and strategically focused on events, careers, fundraising, financials, and operations, our solutions suite is bound by a common purpose to serve the organizations that make our communities a better place to live.

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