

THE GLOBAL MEMBERSHIP ECONOMY REPORT – 1st Edition

Market landscape, taxonomy and economic sizing
2026

The first authoritative framework for defining, classifying and sizing the global membership sector — spanning professional associations, trade bodies, civil society organisations, institutional membership communities, and commercial subscription memberships.

PRIMARY BENCHMARK MARKETS

United States of America, United Kingdom, Canada and Australia

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Foreword

Throughout my career in the membership sector, I have often asked a seemingly straightforward question: how large is the global membership economy?

As a membership professional and founder of Membership World, I have found it surprisingly difficult to answer. While membership organisations play a critical role in professional development, industry representation, advocacy, knowledge sharing, and community building, there has been no single, authoritative source that defines and quantifies the sector.

Part of the challenge lies in the diversity of membership itself. Professional bodies, trade associations, chambers of commerce, learned societies, charities, unions, alumni networks, and countless other member-led organisations are often categorised differently across industries and countries. This fragmentation has made meaningful measurement difficult.

Membership World is proud to partner with the Research Concierge in producing what we believe is one of the first serious attempts to define and quantify the membership economy. By establishing a clear definition of membership and introducing a practical taxonomy of the different segments that make up the broader membership economy, it provides a foundation for future research and industry discussion. We are pleased to see this work come to fruition and hope it serves as a catalyst for further research, collaboration, and recognition of the sector's true scale and impact.

While a comprehensive global assessment of membership organisations may still be an aspiration for the future, every industry requires a starting point. This report represents that starting point. It provides a thoughtful methodology, a common language, and a set of evidence-based estimates that can be refined and expanded over time.

For membership leaders, policymakers, researchers, technology providers, and the wider community of professionals who serve this sector, I hope this report sparks further discussion, collaboration, and investigation. Most importantly, I hope it helps elevate the visibility and recognition of a sector that plays a vital role in professional development, economic growth, representation, advocacy, knowledge sharing, and community building across the world.

Gordon Glenister

CEO and Founder, Membership World



Executive summary

The membership economy represents one of the most economically significant yet analytically underserved sectors in the global economy. Despite mobilising millions of participants, generating sizeable revenues and performing functions critical to democratic civil society, professional standards and economic coordination, the sector has never been comprehensively defined, taxonomised or sized in a single authoritative study.

This report changes that. Across four markets, we identify between 43,000 and 52,000 active professional and industry associations, employing more than 611,000 people and generating annual revenues of USD \$88–92 billion. Their collective contribution to gross value added — USD \$44–46 billion — rivals sectors that attract far greater policy attention and investment. The numbers are striking. The absence of numbers, until now, is more striking still.

The reason this sector has remained analytically invisible is structural. Membership economy research is scattered across at least six disciplines — association management, charity economics, civil society studies, subscription economy analysis, trade body registries, and platform economics — with no shared vocabulary, no common framework, and no authoritative cross-national synthesis. The consequences are real: policymakers regulate without evidence, investors underestimate scale, association leaders benchmark against nothing, and national accounts routinely undercount the sector's true economic contribution.

This report exists to close that gap. We propose a four-layer taxonomy that, for the first time, brings the full membership economy into a single coherent frame: professional and industry associations; civil society and community organisations; institutional membership communities; and commercial subscription-based memberships. Together, these layers account for a sector of extraordinary breadth, complexity, and consequence.

We offer this as a foundational reference — designed to be cited, challenged, extended, and built upon. The membership economy deserves the rigour and attention long applied to sectors half its size. We hope this report marks the beginning of that conversation. Thank you for your interest in this report. We hope you find it an engaging and thought-provoking read, and that it contributes to further discussion, reflection, and exploration of this important subject.

Yashraj Jain
Founder, Research Concierge



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Section 1: Conceptual framework and taxonomy

1.1 Foundational concepts: Membership, association and community

The word "membership" is among the most semantically overloaded terms in organisational analysis. It has been applied to subscription relationships between consumers and corporations, to legal relationships between citizens and nation-states, to participation relationships between volunteers and charities and to commercial relationships between buyers and loyalty programmes. Before a taxonomy can be constructed, the conceptual foundations of membership must be examined with care.

1.1.1 What constitutes a membership relationship?

This report identifies five defining characteristics of a genuine membership relationship:

Characteristic	Description	Excludes
i) Formal enrolment	The member explicitly affiliates with the organisation through a recognised act of joining, registration or application.	Casual participation; audience relationships; one-time customers
ii) Mutual obligation	Both member and organisation assume reciprocal rights and responsibilities. The relationship is bilateral and ongoing.	Donor-charity relationships; subscription services with no reciprocal obligations
iii) Collective benefit	The member derives benefits that are at least partially collective in nature, shared with other members, rather than purely individual.	Pure subscription services; purely transactional commercial relationships
iv) Identity dimension	Membership confers or reinforces a professional, social or civic identity. The member identifies (at some level) with the collective.	Customer relationships; ticket-buyer relationships
v) Governance participation	Members have, or could exercise, some form of voice in the governance or direction of the organisation	Passive subscription; loyalty programme participation

Importantly, not all five characteristics need to be fully present in every membership relationship. A commercial gym membership may score low on governance participation but high on formal enrolment and identity. A professional body membership may score high on all five.

1.1.2 Membership–subscription boundary

One of the most commercially important definitional questions concerns the boundary between "membership" and "subscription." This boundary has been deliberately blurred by commercial actors — Amazon Prime is marketed as a "membership"; Costco describes its paying customers as "members"; gym chains and streaming services routinely use membership language in contexts where subscriptions would be more accurate. This report draws the following analytical distinction:

Membership vs. Subscription: The analytical distinction
SUBSCRIPTION MODEL: Primary value is access to a service, content or product. The "membership" relationship is instrumental — it exists to enable consumption. Governance participation is absent or purely nominal. Collective identity is incidental rather than core. Exit is primarily a function of consumption preference. MEMBERSHIP MODEL: Primary value includes collective benefits, representation, credentialing, community and/or identity that are intrinsically membership dependent. The relationship involves mutual obligations. Governance participation is at least formally available. Collective identity is a material part of the value proposition. Exit implies disaffiliation, not merely cancellation.

1.2 Four-layer membership economy taxonomy

The taxonomy introduced in this report organises the membership economy into four layers, differentiated by primary mission orientation, economic model, legal structure, governance character, and the nature of the membership relationship. The layers are not exhaustive silos — significant organisational overlap exists and many organisations have characteristics spanning multiple layers. The taxonomy is designed to be analytically useful rather than definitive.

The four-layer membership economy taxonomy
Layer 1: Professional bodies and industry associations
Professional bodies, trade associations, chambers of commerce, standards bodies, learned societies, certification and accreditation organisations.
Layer 2: Civil society and community organisations
Trade unions, membership charities, advocacy organisations, religious congregations, mutual aid societies, community and hobby clubs, civic and fraternal organisations.
Layer 3: Institutional communities
University alumni associations, parent-teacher associations, museum memberships, corporate alumni networks, cultural institution memberships, employee affinity groups.
Layer 4: Commercial subscription memberships
SaaS communities, loyalty programmes, retail memberships, creator communities, premium subscription ecosystems.

1.2.1 Layer 1 — Industry, professional and trade associations

Layer 1 comprises organisations whose primary purpose is to represent and serve the collective interests of a defined professional, industry, or trade community. These organisations are the primary focus of quantitative analysis in this inaugural report, for three reasons: they are the largest and most economically measurable segment of the membership economy; they have the strongest formal regulatory footprint (making registry-based counting feasible); and they are the most directly relevant to the association management software industry, a key audience for this research.

Layer 1 sub-groups
- Professional bodies and institutes — credentialing, standards, CPD and representation for specific professions (e.g. medical councils, bar associations, engineering institutes, accountancy bodies) - Trade associations — representing collective interests of businesses or companies in a defined industry or sector - Chambers of commerce — representing general business interests at local, regional, or national level; particularly important in North America, Europe, and Australasia - Industry federations — umbrella bodies coordinating multiple trade associations within a broad sector - Standards and accreditation bodies — developing and maintaining technical or quality standards (may be membership-based or statutory) - Certification organisations — issuing professional certifications and credentials, often membership-linked - Learned societies and academies — advancing knowledge in academic or scientific disciplines; membership often by election or achievement - Sector institutes and research associations — combining membership with applied research and policy functions
Typical legal forms:
- USA: 501(c)(6) (business leagues), 501(c)(3) (educational/scientific), nonprofit corporation. - UK: company limited by guarantee, registered society, Royal Charter body, statutory body.

- Canada: federal/provincial nonprofit corporation.
- Australia: incorporated association, company limited by guarantee, statutory authority.

1.2.2 Layer 2 — Civil society and community membership organisations

Layer 2 encompasses the broad civil society membership sector — organisations whose primary orientation is social, civic, advocacy-based, mutual-aid, cultural or recreational, rather than professional or commercial. This layer is substantially larger than Layer 1 in terms of the number of organisations and aggregate membership but is considerably harder to quantify due to the prevalence of informal, unregistered and volunteer-led entities.

Layer 2 sub-groups
• Trade unions and labour federations — collective bargaining, worker representation and advocacy; • Membership charities — charities whose operational model includes a formal membership base (distinct from fundraising donor relationships) • Advocacy and campaigning organisations — formal membership-based policy advocacy bodies (environmental groups, consumer associations, etc.) • Religious congregations and faith communities — formal membership participation in organised religious bodies;
• Mutual aid societies and friendly societies — historic and contemporary mutual-benefit organisations providing financial and social support to members
• Community and cultural societies — arts, heritage, cultural and ethnic community associations • Sporting and recreational clubs — from elite sport governing bodies to grassroots community sports clubs; enormous range of size and formality • Civic, fraternal and service organisations — Rotary, Lions, Freemasons, Scouts and analogous civic participation organisations
• Consumer cooperatives — member-owned enterprises; governance is membership-based even when primary interaction is commercial

The boundary between Layer 2 and the broader for-purpose/voluntary sector is highly porous. Not all charities are membership organisations. This report uses the five-characteristic membership test to determine inclusion but acknowledges that application of this test at scale is impractical and that aggregate statistics for civil society organisations will systematically include some non-membership entities and exclude some informal membership bodies.

1.2.3 Layer 3 — Institutional membership communities

Layer 3 covers membership communities that are embedded within or attached to larger institutions — universities, cultural institutions, corporations and employers. These communities often have characteristics of both Layer 1 (professional identity, networking) and Layer 2 (community, social capital) but are distinguished by their institutional host and their typically hybrid position between membership organisation and service delivery unit.

Layer 3 sub-groups
• University alumni associations — formal post-graduation membership communities; often with separate charitable registration but institutionally affiliated
• Parent-teacher associations — school-level membership bodies with civic and educational functions; • Museum and gallery membership programmes — formal paying membership with access, identity, and community dimensions; • Other cultural institution memberships — performing arts organisations, botanical gardens, science centres, zoos with structured membership programmes

- Corporate and employer alumni networks — formal networks of former employees; increasingly strategic tools for talent, business development and brand building
- Employee affinity and resource groups — formally constituted internal membership communities within larger employers
- Cooperative and mutual institution members — formal membership of building societies, credit unions and mutual insurers

Layer 3 organisations typically have mixed funding: a combination of membership fees, institutional subvention, donations and programme income. The membership fee component is often relatively small; the non-fee membership value proposition (access, identity, donor relationship) is typically primary.

1.2.4 Layer 4 — Commercial subscription memberships

Layer 4 occupies the convergence zone between the traditional membership economy and the commercial subscription economy. It includes organisations and platforms that use membership language, governance or community architecture in a primarily commercial context. This layer is growing rapidly as digital platforms discover that "membership framing" drives retention, engagement and willingness-to-pay.

Layer 4 sub-groups

- Premium SaaS communities — subscription software platforms that embed community, certification or advocacy functions alongside software access
- Retail memberships — warehouse clubs (Costco, Sam's Club), subscription retail and retail loyalty programmes with genuine membership characteristics
- Paid creator communities — Substack, Patreon and analogous platforms where paying members access exclusive creator content and community
- Professional online communities — LinkedIn Premium, industry-specific platforms with paid membership tiers and community functions
- Loyalty programmes with membership architecture — airline alliances, hotel programmes, and retail reward schemes with genuine status and community dimensions

Layer 4 analysis does not extend to the full subscription economy. Pure streaming services, pure SaaS subscriptions without community dimensions, and subscription boxes without meaningful membership characteristics are excluded. Layer 4 represents a subset of the wider subscription economy where membership characteristics are materially present.

Section 2: Global market overview

2.1 Membership economy in global context

The membership economy, as defined and taxonomised in this report, is a global phenomenon of substantial economic and social scale. This inaugural edition focuses detailed quantitative analysis on four primary benchmark markets. This section provides the best available directional Layer 1 estimates for UK, USA, Canada and Australia, with appropriate caveats regarding data limitations.

- **United States of America:** The largest and most mature market, with 21,161 organisations generating \$52.88B revenue and \$25.41B GVA, underlining its dominant share of both activity and economic contribution across all four markets.
- **United Kingdom:** A sizeable but more variable market (8,615–10,681 organisations) producing £16.04B (\$21.65B) in revenue, demonstrating strong economic output relative to its organisational base and high employment density.
- **Canada:** The widest uncertainty range (4,706–11,500 organisations) reflects data challenges yet still contributes a meaningful \$3.01–7.36B in revenue and \$1.48–3.61B GVA (USD), signalling a fragmented but economically relevant sector.
- **Australia:** A comparatively concentrated ecosystem (8,631 organisations) delivering \$10.24B revenue and \$5.12B GVA (USD), indicating strong per-organisation productivity within a smaller market.

Global market overview	United States of America	United Kingdom	Canada	Australia	Four-market combined
Active Layer 1 organisations	21,161	8,615-10,681	4,706-11,500	8,631	42,843-51,973
Direct employees (FTE)	197,434	116,765	186,000	110,903	611,102
Annual revenue (domestic currency)	USD \$52.88B	GBP £16.04B	CAD \$4.13–10.09B	AUD \$14B	-
Annual revenue (USD equivalent based on exchange rates in May 2026)	USD \$52.88B	USD \$21.65B	USD \$3.01–7.36B	USD \$10.24B	USD \$87.78–92.13B
GVA contribution (domestic currency)	USD \$25.41B	GBP £8.99B	CAD \$2.02–4.94B	AUD \$7.11B	-
GVA contribution (USD equivalent based on exchange rates in May 2026)	USD \$25.41B	USD \$12.15B	USD \$1.48–3.61B	USD \$5.12B	USD \$44.16-46.29B

Source: The Global Membership Economy Report, 2026, Research Concierge

Section 3. Conclusions and Key takeaways

The membership economy is a foundational layer of how modern economies self-organise — setting professional standards, representing industry, and sustaining the civic architecture on which democratic governance depends. Yet it remains one of the most poorly measured sectors in economic life. That gap carries direct implications for every stakeholder with an interest in the sector.

3.1 Policymakers: Governments regularly make decisions affecting the membership sector — on tax treatment, professional licensing, industry consultation, and standards governance — without a reliable evidence base. The immediate priority should be adopting the OECD non-profit satellite account framework with a dedicated sub-category for membership organisations. A cross-government working group with statistical agencies across the four benchmark markets, tasked with developing a common measurement standard, would be a low-cost, high-value intervention. Beyond data, existing regulatory frameworks — charitable status criteria, competition law as applied to standards bodies, professional licensing rules — were not designed for a platform-mediated professional economy and are overdue for review.

3.2 Investors and technology providers: The association management software market is larger and more strategically significant than most investors recognise. The four benchmark markets contain an estimated 35,000 to 70,000 active Layer 1 organisations, the majority underserved by current technology. The convergence of community architecture and software-as-a-service is the defining commercial trend in this space. Platforms that credibly serve engagement, credentialing, and advocacy functions — what distinguishes genuine membership organisations from pure subscriptions — will capture disproportionate value. Market consolidation is inevitable in a highly fragmented vendor landscape. AI integration is already a competitive differentiator, not a future consideration.

3.3 Association leaders: The membership value proposition cannot be taken for granted. Every data point on generational behaviour and platform competition points the same way: associations that thrive through the 2030s will be those that have made an honest diagnosis of what members value and redesigned their model accordingly — not around institutional habit. Most associations cannot currently answer basic questions about member engagement, renewal risk, or programme ROI. Building the data infrastructure to answer those questions is a governance priority. The opportunity is real: credentialing authority, regulatory legitimacy, and deep professional community are assets no commercial platform can replicate. The challenge is mobilising them before disengagement becomes structural.

3.4 Future research: next steps

The most valuable next steps are not more analysis of existing data — they are the creation of new data that does not yet exist. Three priorities stand out.

First, a structured survey of Layer 1 organisations across the four benchmark markets, capturing revenue, employment, membership, and digital maturity on a consistent basis, would replace triangulated estimates with direct evidence. Second, engagement with ONS, Statistics Canada, ABS, and the BLS to establish a formal membership sub-category within non-profit satellite accounts would create permanent, annually updated infrastructure. Third, geographic expansion to Western Europe and Asia-Pacific in future editions would enable the comparative analysis the sector currently lacks.

Section 4: Research methodology

4.1 Research design

This study employs a multi-method, triangulated research design across each of the four benchmark markets. Five complementary approaches were combined: analysis of regulatory and registry data from government and statutory bodies; mapping of official industry classification codes to the Layer 1 taxonomy; review and synthesis of existing sector surveys and academic literature; bottom-up estimation using known reference points where direct administrative data was insufficient; and expert-informed confidence assessment applied to all headline figures.

4.2 Limitations

Four systematic limitations apply across all markets. First, regulatory registries include dormant, deregistered, or shell entities, inflating active organisation counts — mitigated through activity filters, revenue screens, and the presentation of figures as ranges with conservative lower bounds. Second, industry classification codes do not perfectly align with the Layer 1 taxonomy, creating both inclusion and exclusion errors — addressed through scope adjustment factors. Third, federated organisations appear as multiple entities across local, regional, and national levels — counted at entity level. Fourth, official revenue data may lag current conditions by two to four years — addressed using the most recent available data and modest extrapolation where time-series evidence supports it.

The four headline metrics — number of organisations, employment, revenue, and gross value added — were derived through market-specific approaches, each shaped by the data infrastructure available in that jurisdiction. Where direct administrative data existed, it was used. Where it did not, transparent model-based estimation was applied.

4.3 Gross value added

Gross value added was calculated by applying a value-added-to-revenue ratio to the revenue estimate for each market. For the UK, US, and Canada, this ratio was derived from OECD Output and Value-Added data for the relevant industry classification, providing an empirically grounded basis that reflects the cost structure of the membership sector as observed in national accounts. For Australia, where OECD data was not available at the required level of disaggregation, a conservative ratio of 50% was applied — consistent with the range observed across the other three markets.

4.4 Currency conversion

All figures are reported in domestic currency as the primary denomination. Cross-market comparisons are expressed in US dollars, converted at May 2026 exchange rates. USD equivalents should be treated as indicative of relative scale; domestic currency figures should be used where precision matters.