SURVEY OF U.S. FIRST-YEAR RETURNING MEMBERS

2018-Q2 Research Brief

Survey of U.S. First-Year Returning Members

SELECT RESULTS

For the past few years, we have sent a survey to returning U.S. first-year members. *Here we will look at the responses to select questions* from three cohorts of returning first-year U.S. members:

- Class 2015 returning in 2016;
- Class 2016 returning in 2017; and,
- Class 2017 returning in 2018.

Note that the number of respondents may seem small, but so is the number of returning first-year members. In each year, the response rate was between 18% and 23%.

Summary Points:

- ✓ Overall satisfaction with membership is high. **Combining the three cohorts**, 94.9% indicated being satisfied/very satisfied. *However, the percent satisfied/very satisfied decreased from 98.4% among the Class of 2016 respondents to 88.4% among the Class of 2017 respondents. Ten Class of 2017 respondents provided comments for this question and six of the ten comments mentioned the early registration closings of the 2017 and 2018 Annual Meetings.*

- ✓ **Combining the three cohorts** of respondents, about 45% said it was easier to qualify, 43% said it was the same (no difference), and about 12% said it was harder to qualify. The number of respondents who said it was harder to qualify is too low to seek a pattern in the use of resources such as the Resource Zone.

- ✓ Members were asked to indicate their agreement level with five statements – again, **combining the three cohorts**:

  - 83.5% agreed/strongly agreed with ... *My MDRT membership contributed to my personal development*.

  - 82.5% agreed/strongly agreed with ... *My MDRT membership contributed to my professional success.*

  - 59.6% agreed/strongly agreed with ... MDRT allowed me to build meaningful relationships with peers around the world.

  - 94.6% agreed/strongly agreed with ... I believe MDRT cares about its members and strives to help them succeed.

  - 97.3% agreed/strongly agreed with ... I would recommend MDRT membership to colleagues.

Summary Points:

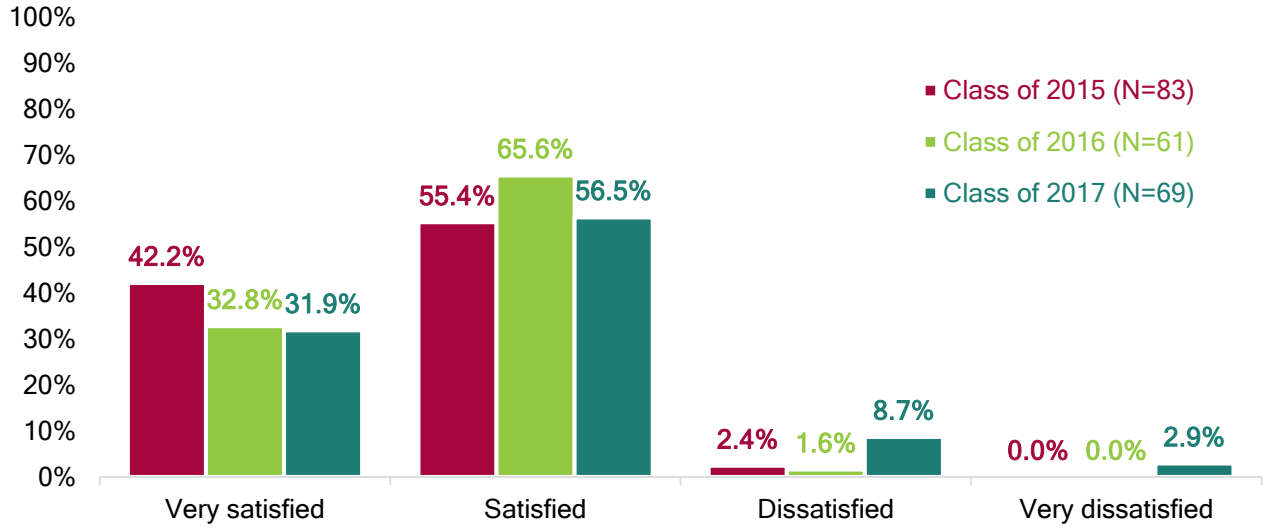
However, similar to the overall satisfaction, the percentage "agree/strongly agree" is lower for Class of 2017 than for Class of 2016.

- ✓ The onboarding initiative for U.S. first-time members started in 2016 and has continued. In terms of these surveys, the 2016 members returning in 2017 and the 2017 members returning in 2018 were asked about their onboarding experience.
  - The Welcome Kit was the most remembered item, followed by the reference of "Class of _____ ", and the special issue of *Round the Table* magazine. The least remembered items were the welcome phone calls and the Class Notes e-newsletters.
  - Among the respondents who remembered the items, more of them said that receiving the items did not play a role in their decision to renew their membership.
  - For each onboarding item, they were given a positive statement regarding the item and asked for their agreement level with the statement. Among each of the two responding cohorts, all statements received high agreement (>70%).

SELECT SURVEY QUESTIONS

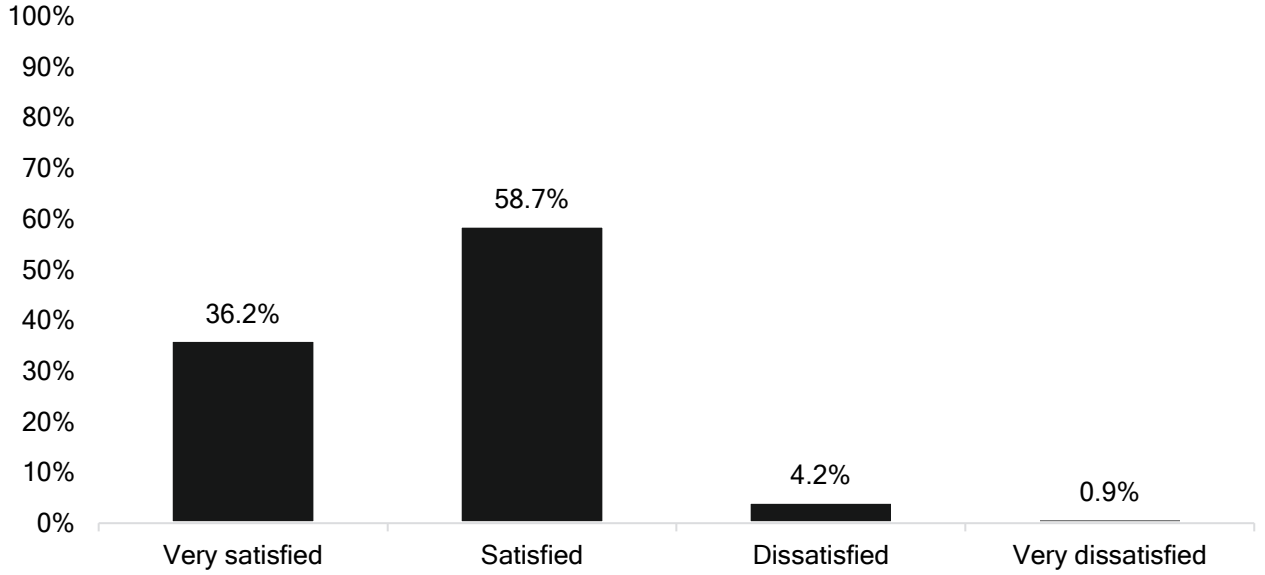
Overall, how satisfied are you with your MDRT membership?

In all three years, the majority are satisfied/very satisfied; however, *the percent satisfied/very satisfied decreased from 98.4% among the Class of 2016 respondents to 88.4% among the Class of 2017 respondents. Ten Class of 2017 respondents provided comments for this question and six of the ten comments mentioned the early registration closings of the 2017 and 2018 Annual Meetings.* Among **Class of 2017 respondents**: total responses were 69, 31.9% (or **22**) said they were very satisfied; 56.5% (or **39**) said they were satisfied; 8.7% (or **6**) said they were dissatisfied; and 2.9% (or **2**) said they were very dissatisfied.



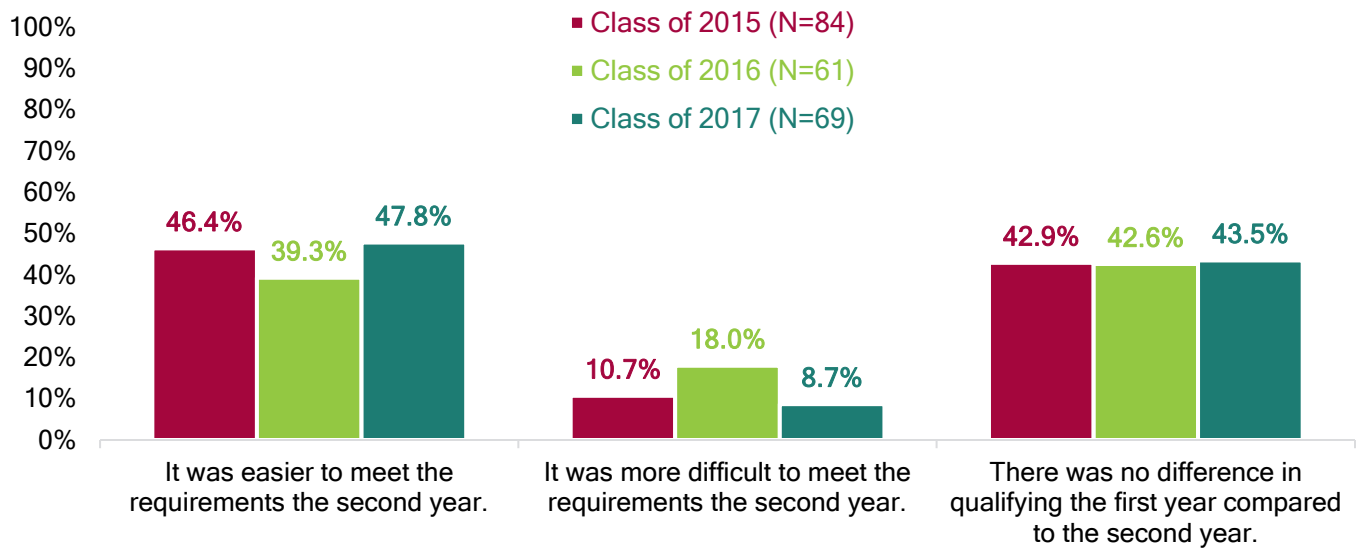
Since these are distinct populations – in other words, each cohort is unique to a specific year/survey – combining them gives us an overall bigger pool (N=213) of first-time U.S. members who returned the next year. Among all of them, 94.9% indicated being satisfied/very satisfied.

All three cohorts combined (N=213)

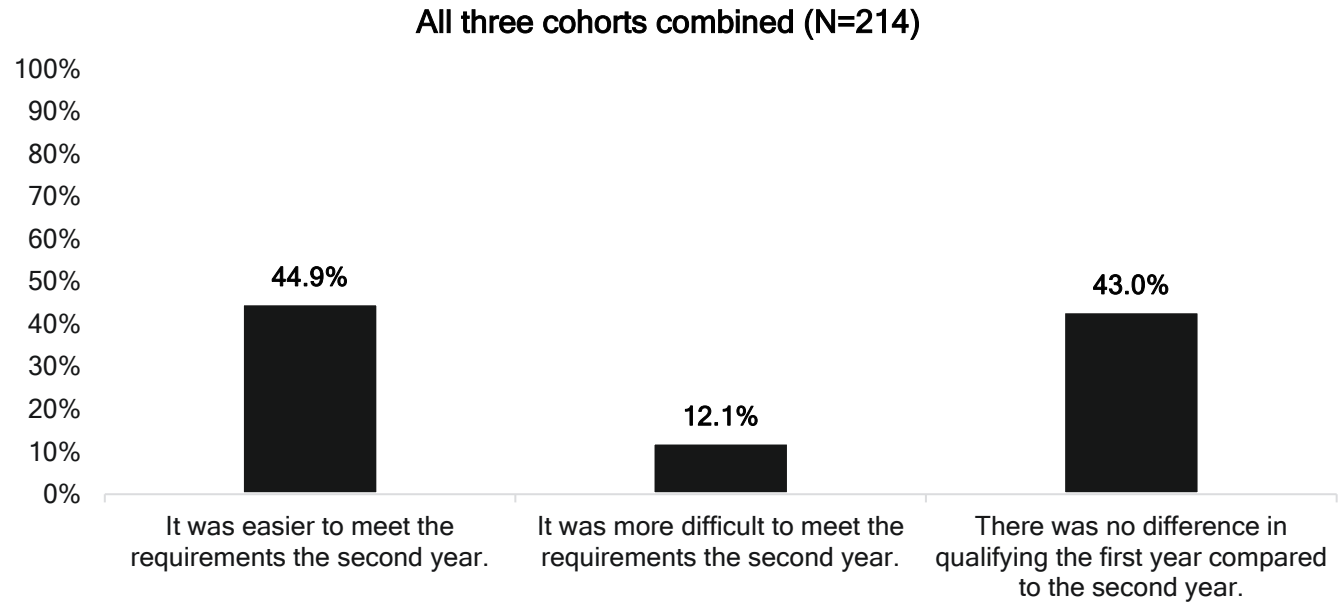


Which of the following describes your experience in becoming a second-year MDRT member?

In all three years, less than 20% said that it was harder for them to qualify for their second year.



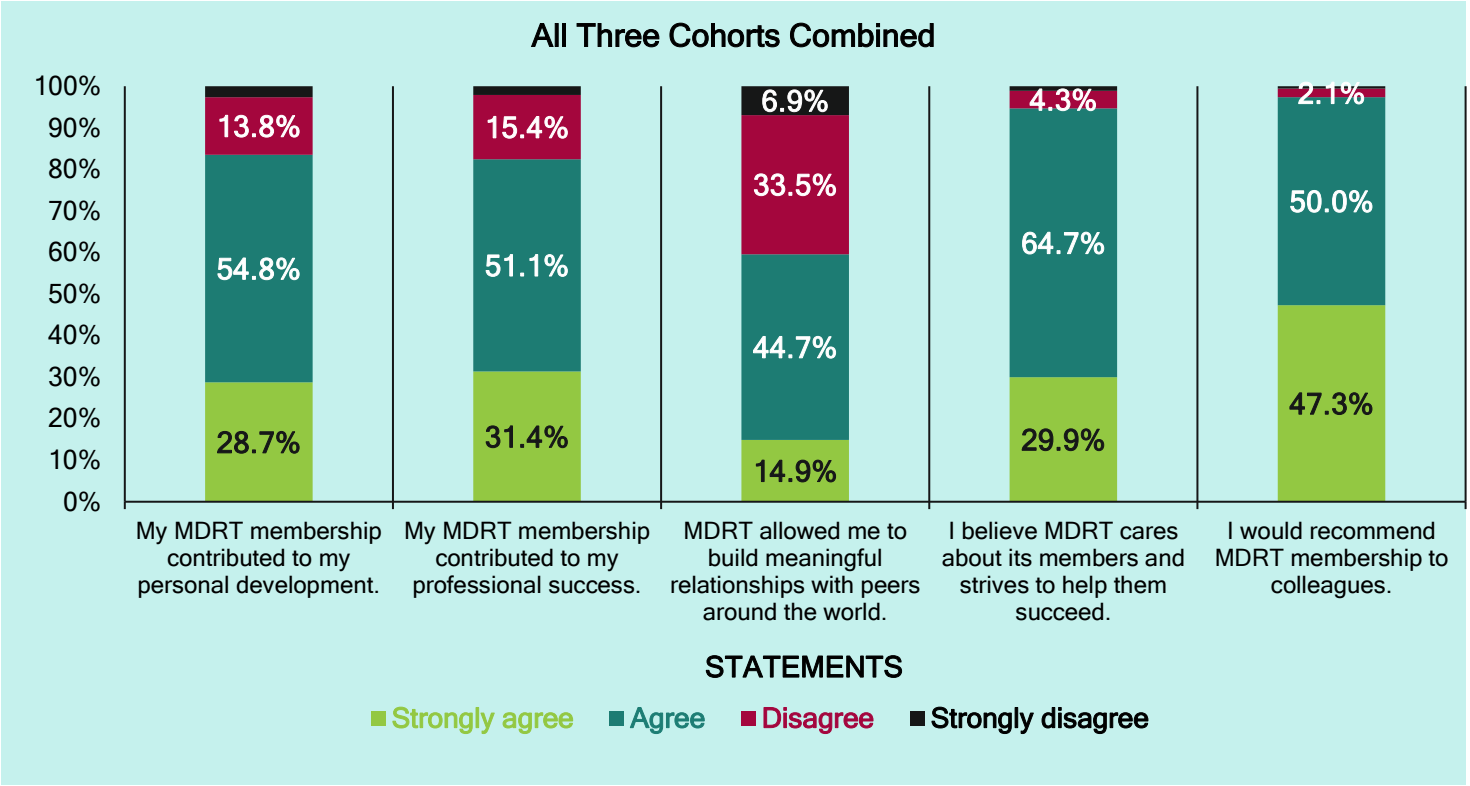
Combining the cohorts, overall, 45% thought it was easier, 43% thought it was the same and 12% thought it was harder to qualify. The 12% represent nine (9) respondents from Class of 2016 and three (3) respondents from Class of 2017. Two of the nine Class of 2016 respondents indicated that they did not use the Resource Zone and all three from Class of 2017 indicated the same.



Members were asked to indicate their agreement level with the following statements:

1. *My MDRT membership contributed to my personal development.*
2. *My MDRT membership contributed to my professional success.*
3. *MDRT allowed me to build meaningful relationships with peers around the world.*
4. *I believe MDRT cares about its members and strives to help them succeed.*
5. *I would recommend MDRT membership to colleagues.*

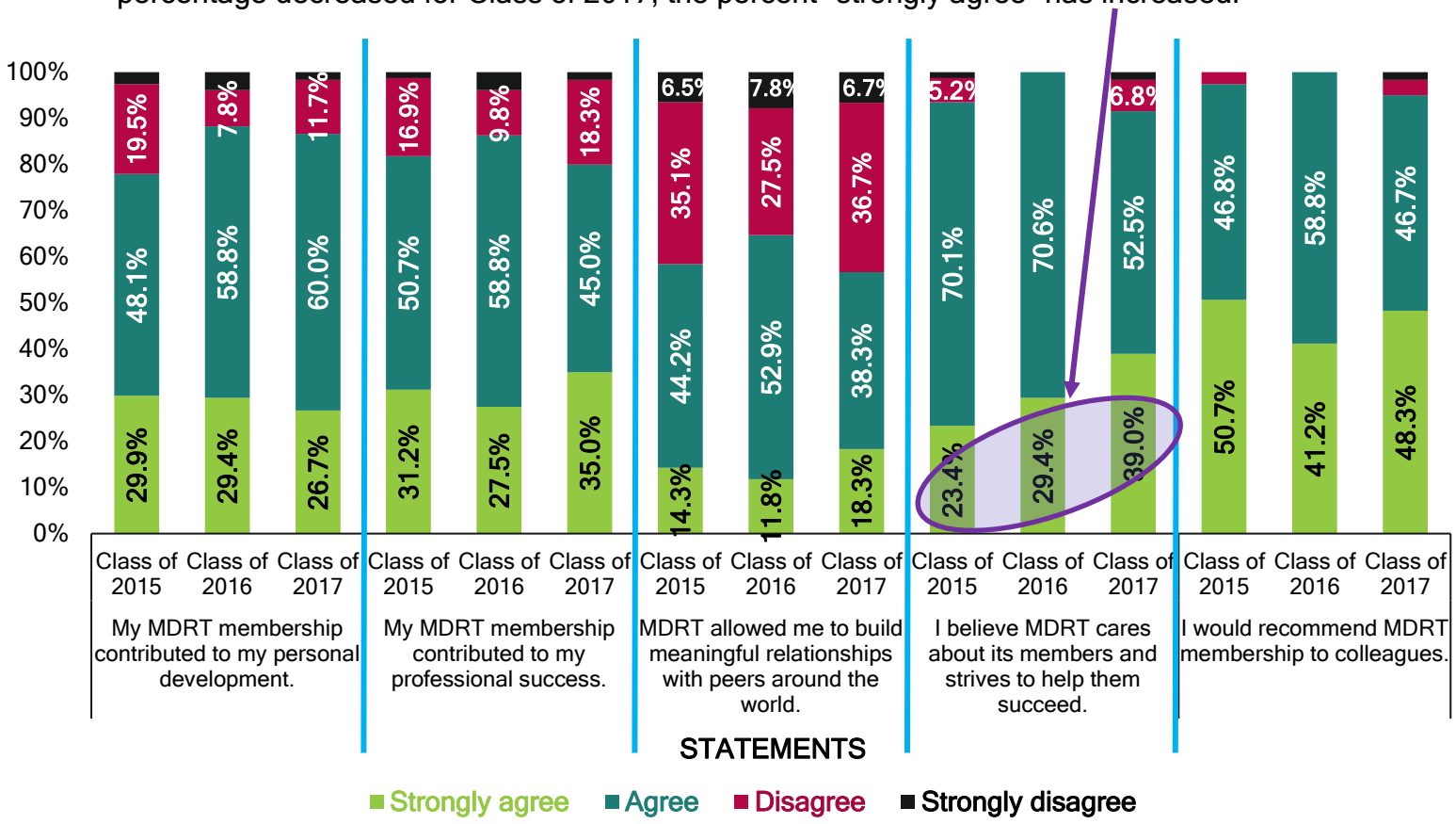
Combining the three cohorts, 40.4% disagreed/strongly disagreed with the third statement regarding MDRT allowing them to build meaningful relationships with peers around the world. In contrast, almost all (97.3%) would recommend MDRT membership to colleagues.



However, similar to the overall satisfaction, the percent agree/strongly agree is lower among Class of 2017 respondents compared to Class of 2016 respondents.

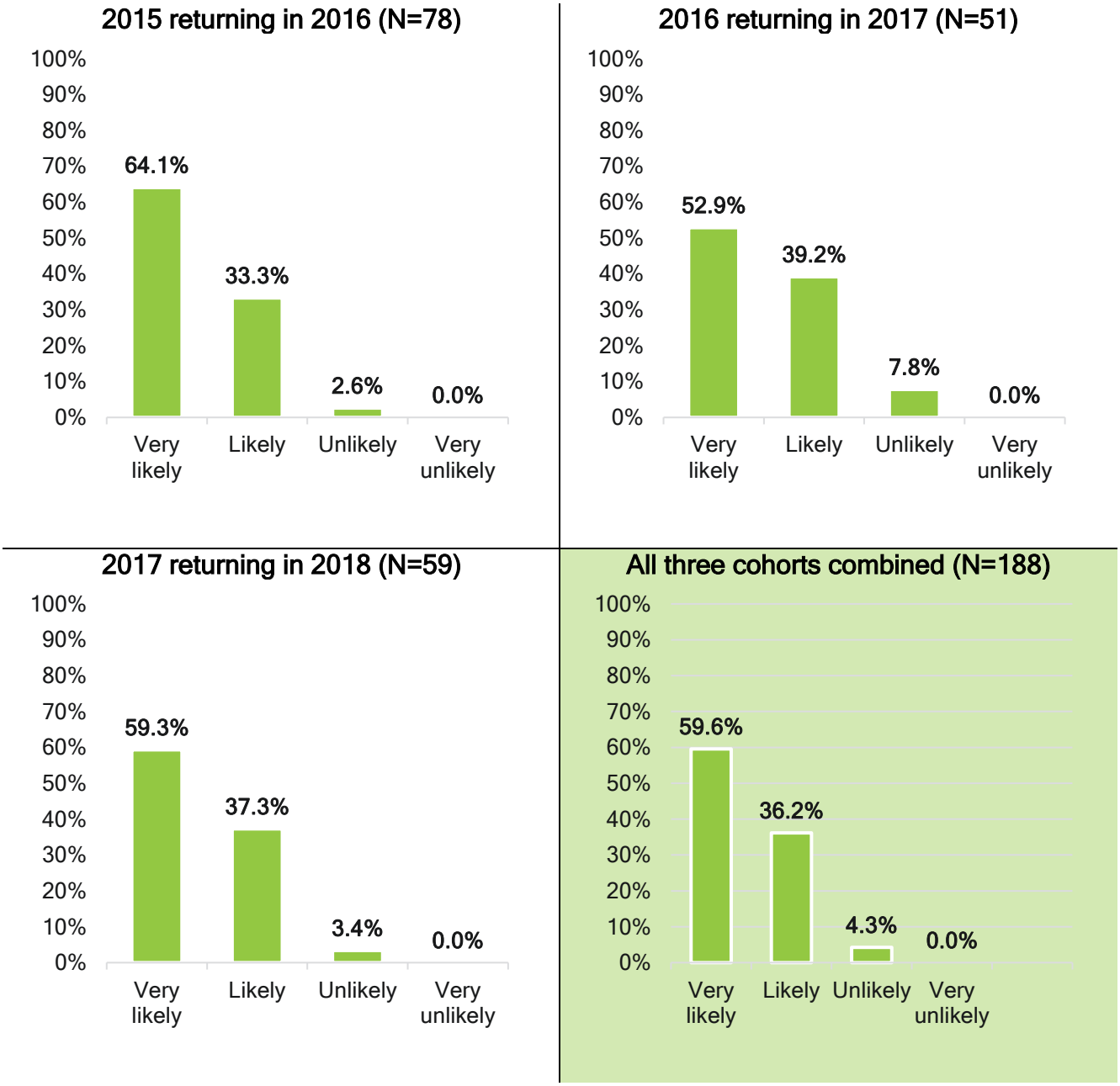
Please indicate your level of agreement with the following statements:	% agree/strongly agree		
	Class of 2015	Class of 2016	Class of 2017
My MDRT membership contributed to my personal development.	78.0%	88.2%	86.7%
My MDRT membership contributed to my professional success.	81.9%	86.3%	80.0%
MDRT allowed me to build meaningful relationships with peers around the world.	58.5%	64.7%	56.6%
I believe MDRT cares about its members and strives to help them succeed.	93.5%	100.0%	91.5%
I would recommend MDRT membership to colleagues.	97.5%	100.0%	95.0%

The graph below shows all the percentages and is a little busy – take one statement at the bottom and follow the percentages relating the agreement level from each cohort of responding members. Note that for statement 4, while the combined "agree/strongly agree" percentage decreased for Class of 2017, the percent "strongly agree" has increased.



How likely are you to continue your MDRT membership?

Combining the three cohorts, 59.6% said they were very likely to continue their membership. While this question may be key among many associations, it's a bit tricky for MDRT. If a member knows that he cannot maintain the requirement needed to qualify for membership, how is he to answer this question and, subsequently, how should an "unlikely" or a "very unlikely" response be perceived by us?



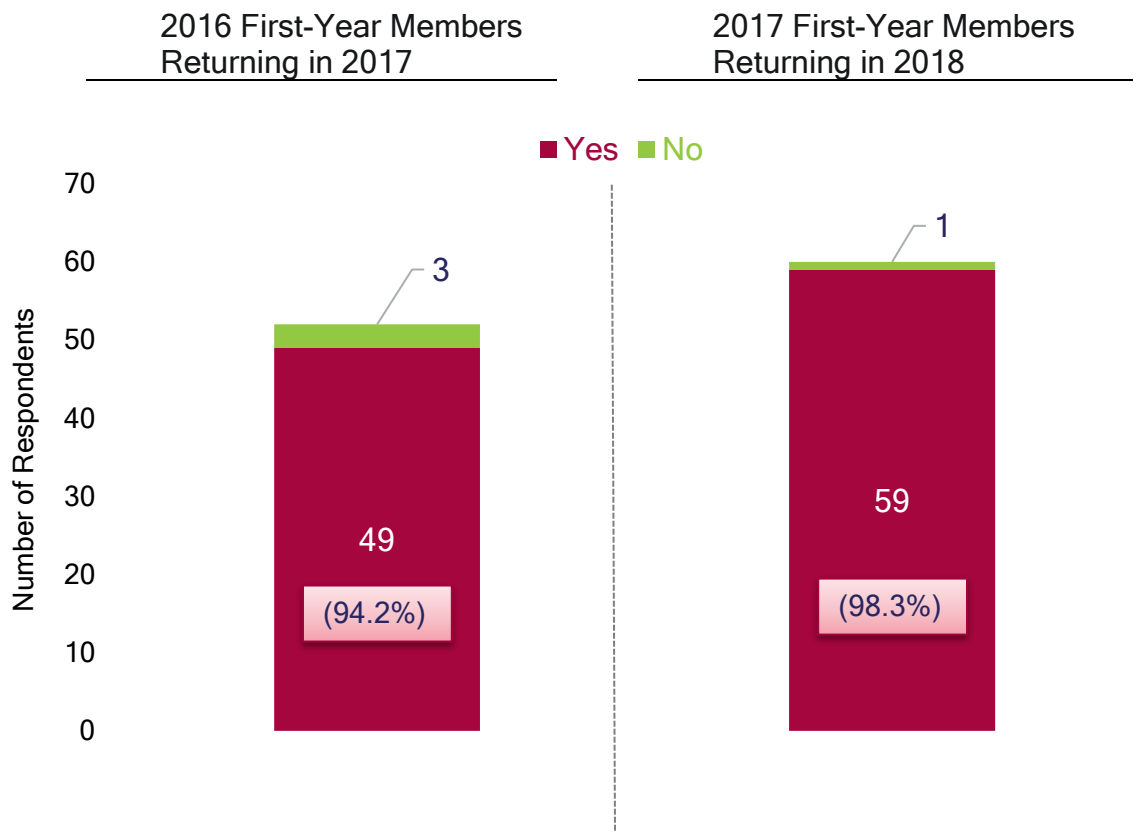
FIRST-YEAR U.S. MEMBER ONBOARDING QUESTIONS

As mentioned previously, in 2016, a new initiative was undertaken to welcome first-year U.S. members. The campaign consisted of:

- A Welcome Kit (a box that was mailed) containing memorabilia as well as information regarding MDRT content;
- The use of the reference, "Class of ____";
- A welcome phone call;
- The Class Notes e-newsletter containing information and links to content; and,
- A special version of *Round the Table* magazine with the member's name appearing on the cover page.

In these surveys of returning first-year members, they were asked about their onboarding experience. Below are the results from the 2017 survey (2016 first-time members that returned in 2017) and the 2018 survey (2017 first-year members that returned in 2018). For example, as shown in the graph below, almost all respondents indicated that they received the Welcome Kit.

Did you receive a Welcome Kit in the mail from MDRT?



The table below summarizes the members' recall regarding ***all the onboarding items***. The Kit is the most remembered item, the calls and the e-newsletter are the least remembered.

"...did you receive/notice [onboarding item]?"

Onboarding Item	Total Answering	Yes	No	% Yes	
Welcome Kit					****Most remembered item*
2016-2017	52	49	3	94.2%	
2017-2018	60	59	1	98.3%	
Both cohorts combined	**112**	**108**	**4**	**96.4%**	
Class of _____ reference					***Second most remembered item*
2016-2017	52	42	10	80.8%	
2017-2018	61	46	15	75.4%	
Both cohorts combined	**113**	**88**	**25**	**77.9%**	
Welcome phone call					*Least remembered (<50%)*
2016-2017	52	24	28	46.2%	
2017-2018	61	22	39	36.1%	
Both cohorts combined	**113**	**46**	**67**	**40.7%**	
Class Notes e-newsletter					*Least remembered (<50%)*
2016-2017	51	21	30	41.2%	
2017-2018	61	24	37	39.3%	
Both cohorts combined	**112**	**45**	**67**	**40.2%**	
Special issue of RTT					**Third most remembered item*
2016-2017	52	34	18	65.4%	
2017-2018	61	40	21	65.6%	
Both cohorts combined	**113**	**74**	**39**	**65.5%**	

Among those that remembered the onboarding item, below is the breakdown of whether they said it played a role in renewing membership (recall that these are members that renewed).

"...did it play a role in your decision to renew your membership?"

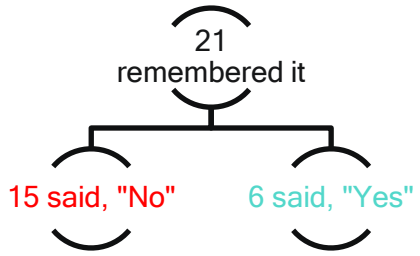
Welcome Kit: 2016-2017	Welcome Kit: 2017-2018	Welcome Kit: Both Cohorts
49 remembered it	59 remembered it	108 remembered it
37 said, "No" / 12 said, "Yes"	35 said, "No" / 24 said, "Yes"	72 said, "No" / 36 said, "Yes"

Class of ____: 2016-2017	Class of ____: 2017-2018	Class of ____: Both Cohorts
42 noticed it	46 noticed it	88 noticed it
28 said, "No" / 14 said, "Yes"	30 said, "No" / 16 said, "Yes"	58 said, "No" / 30 said, "Yes"

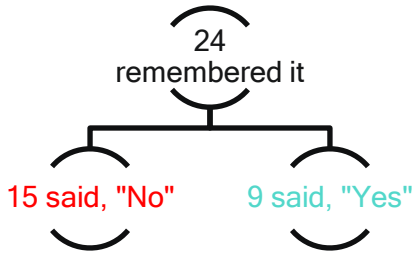
Phone call: 2016-2017	Phone call: 2017-2018	Phone call: Both Cohorts
24 remembered it	22 remembered it	46 remembered it
18 said, "No" / 6 said, "Yes"	13 said, "No" / 9 said, "Yes"	31 said, "No" / 15 said, "Yes"

"...did it play a role in your decision to renew your membership?" (cont.)

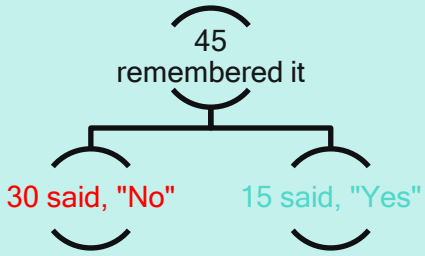
Class Notes: 2016-2017



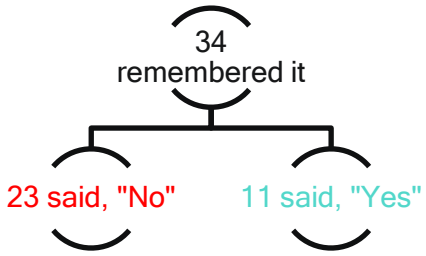
Class Notes: 2017-2018



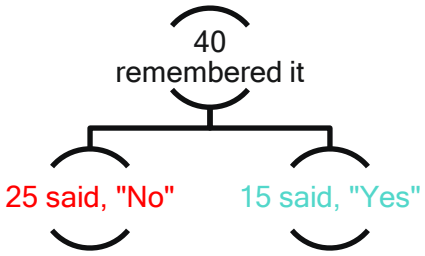
Class Notes: Both Cohorts



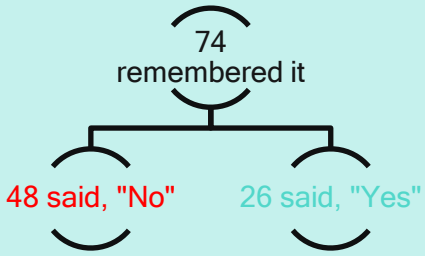
Special RTT: 2016-2017



Special RTT: 2017-2018



Special RTT: Both Cohorts



Lastly, members were given statements regarding the onboarding items and asked to indicate their agreement level. The table below displays the results from the two cohorts – first, it shows the number that remembered the item, and among them, the percent that agreed or strongly agreed with the statement. As illustrated, in both years, there's positive feedback regarding all items.

2016 members returning in 2017		Please indicate your level of agreement with the following statements:	2017 members returning in 2018	
# who remembered the item	% who agreed/strongly agreed		# who remembered the item	% who agreed/strongly agreed
49	95.9%	*"Receiving the Welcome Kit gave me a sense of great achievement."*	59	93.2%
42	88.1%	*"Being identified as part of the Class of 2016 made feel like I belonged to a distinctive group."*	46	73.9%
24	83.4%	*"Receiving the welcome phone call made me feel that MDRT had a personal interest in me as a member."*	22	100%
21	81.0%	*"Class Notes e-newsletters directed me to member benefits."*	24	75.0%
34	100%	*"The special issue of Round the Table gave me helpful information that I needed as a new member."*	40	97.5%