2009 GMAC Application Trends Survey Results:

US MBA Programs

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About the survey

- Survey of admission professionals
- Primary goal: provide statistics on demand for GME worldwide
- Scope:
  - Applications
  - Candidates
  - Recruitment and outreach
  - Marketing budgets
  - Scholarship funds
  - School and program demographic information
- Conducted since 2000. Data collected from June to early July.
- 667 programs/332 schools; 326 US MBA programs/217 schools
Participating MBA programs

- MBA
  - Full-time (n=147)
  - Part-time (n=93)
  - Flexible (n=36)
  - Executive (n=38)
  - Online / distance-learning (n=12)
  - Traditional (n=106)
  - Accelerated (n=41)
Application volume in 3D

APPLICATIONS

RELATIVE CHANGE

ABSOLUTE CHANGE

PER PROGRAM
Applications: all MBA programs

- RELATIVE CHANGE
  - 2008: +72%
  - 2009: +53%

- ABSOLUTE CHANGE
  - 2008: 102,133
  - 2009: 101,417
  - ↓-0.7%

- PER PROGRAM
  - 2008: 538
  - 2009: 534
  - ↓-0.7%

N = 190 US MBA programs provided data both in 2008 and in 2009
Applications by program type

Programs reporting change in application volume

**STRONGEST**
- Accelerated MBA
- Flexible MBA

**STRUGGLING**
- EMBA
- PT MBA
Why application volume changes?

TOP REASONS FOR INCREASE

- Economic conditions
- Marketing efforts
- Reputation, rankings

“Because of the financial crisis, more employees decide to go back to school to sharpen their skills in order to be more competitive in the future.”

TOP REASONS FOR DECLINE

- Economic conditions
- Cost and financing
- Changes in admissions requirements

“Global crisis, applicants think twice before committing themselves with paying a program a significant amount of money.”
# US MBA program candidate profile

<table>
<thead>
<tr>
<th></th>
<th>Full-time</th>
<th>Part-time</th>
<th>Executive</th>
<th>Flexible (on-campus)</th>
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<tbody>
<tr>
<td><strong>Gender (%)</strong></td>
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<td></td>
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<tr>
<td>Female</td>
<td>34</td>
<td>37</td>
<td>27</td>
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<tr>
<td>Male</td>
<td>66</td>
<td>63</td>
<td>73</td>
<td>57</td>
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<tr>
<td><strong>Citizenship (%)</strong></td>
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<tr>
<td>Domestic</td>
<td>53</td>
<td>86</td>
<td>86</td>
<td>67</td>
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<tr>
<td>Foreign</td>
<td>47</td>
<td>14</td>
<td>14</td>
<td>33</td>
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<tr>
<td><strong>Applications submitted per applicant (mean #)</strong></td>
<td><strong>2.7</strong></td>
<td><strong>1.5</strong></td>
<td><strong>1.4</strong></td>
<td><strong>1.4</strong></td>
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International applicants: India & China

Foreign countries from which US MBA programs received the greatest number, the largest increase, and the largest decline in applications

GMAT SCORES SENT IN 2004 FROM
1. India (20,084 / 41,018)
2. Taiwan
3. China (10,028 / 22,440)
4. South Korea
5. Japan

GMAT SCORES SENT IN 2008 FROM
1. India (52,363 / 81,978)
2. China (35,670 / 50,358)
3. Taiwan
4. South Korea
5. Canada
India: relative and absolute change

GMAT scores sent to schools in the United States by Indian citizens

- 2004: 41,018 (77%)
- 2005: 43,088 (75%)
- 2006: 53,163 (71%)
- 2007: 64,716 (67%)
- 2008: 81,978 (64%)

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China: relative & absolute change

GMAT scores sent to schools in the United States by Chinese citizens

- 2004: 22,440
- 2005: 19,196
- 2006: 26,116
- 2007: 36,406
- 2008: 50,358

- % of scores sent to the US:
  - 2004: 64%
  - 2005: 65%
  - 2006: 71%
  - 2007: 75%
  - 2008: 77%
Student visas issued by United States

% change in the number of student visas issued by the U.S. Department of State, 2000-2008
Key observations

BROAD PICTURE

- Application trends vary by program type.
- Growth in volumes masks changes in share.
- Economy is a two-sided coin.

SURVEY RESULTS

- Application growth moderated across most program types.
- Applications to accelerated full-time MBA programs are up.
- Applications to part-time and EMBA programs are down.
- In future, more applications from China and fewer from India.