

WORLD

2004-2008

Geographic Trend Report for GMAT® Examinees



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This World Geographic Trend Report for GMAT® Examinees identifies migratory trends among GMAT examinees applying to and attending graduate business school. Geographic and background data collected before each test taker completes the GMAT exam are used and combined with score-sending patterns. Together they illustrate which countries and schools are of interest to citizens of various world regions. Data from the most recent testing year are compared against data from four years prior to identify changes in examinee preferences.

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KEY FINDINGS	2
METHODOLOGY	3
GLOBAL TESTING ENVIRONMENT.....	3
Location of GMAT® Examinees.....	4
Citizenship of GMAT® Examinees.....	5
Score Reports.....	6
REGIONAL SCORE-SENDING PATTERNS.....	7
Worldwide	8
US Citizens.....	9
Canadian Citizens	10
Western European Citizens.....	11
Eastern European Citizens	12
East and Southeast Asian Citizens	13
Central and South Asian Citizens	14
African Citizens.....	15
Middle Eastern Citizens	16
Australian and Pacific Island Citizens.....	17
Mexican, Caribbean, and Latin American Citizens	18
FREQUENTLY ASKED QUESTIONS.....	19
AUTHORSHIP	20
CONTACT INFORMATION.....	20
Acknowledgements.....	20
APPENDIX: REGIONAL CATEGORIES	20

This report presents analyses of student interest in graduate management education by examining data collected from respondents taking the Graduate Management Admission Test® (GMAT®) during the 2004 and 2008 testing years (TY), including the destination of their score reports.

The GMAT score-sending data studied reveal two important types of information relating to the geographic program preferences of examinees. First, *absolute* change in the overall number of GMAT score reports that are sent each year reflects the physical size of the annual student pipeline. Absolute change tends to fluctuate widely depending on yearly testing volume. Second, *relative* change measures the proportion of total scores sent to a given country or region and reveals structural changes in market share. Relative change is generally more stable over time. Understanding both types of information—absolute and relative—enhances a school’s ability to navigate the student pipeline and recruit effectively.

Major differences in score-sending behavior were observed between TY 2004 and TY 2008 for many regions in this report. This is not surprising given the global nature of higher education today, which is characterized by innovation and constant change. Many factors influence the attractiveness of certain programs to students and also the ability of students to pursue management education. This report identifies the aggregate effects of such dynamics.

Key Findings

- GMAT examinees sent nearly 750,000 score reports to schools around the world in TY 2008. This marks a 25% increase from TY 2004 due to both broad increases in global testing and a marginal increase in the average number of scores sent by examinees from 2.9 to 3.0.
- More score reports were sent by non-US citizens (382,377) when compared with US citizens (362,657) in TY 2008. Thus, non-US examinees represented 51% of all scores sent, a proportion up from 46% in TY 2004.
- Although programs in the United States remained the preferred destinations for 81% of GMAT examinees in TY 2008, the propensity of non-US citizens to send more of their score reports to non-US business programs continued to increase. The proportion of scores sent by non-US citizens to the United States has fallen from 75% in TY 2000 to 67% in TY 2004 and 65% in TY 2008.
- Indian and Chinese citizens were responsible for rapid increases in the number of scores sent from Central and South Asia and from East and Southeast Asia. There are differences, however, between these groups. East and Southeast Asian citizens were more likely to send their score reports to US programs, and Central and South Asian citizens were increasingly interested in regional programs and other opportunities in Western Europe.
- Canada was one of the few study destinations to receive fewer score reports in TY 2008 when compared with TY 2004. The market share of those interested in Canadian programs eroded broadly in several of the world regions identified in this report.

Methodology

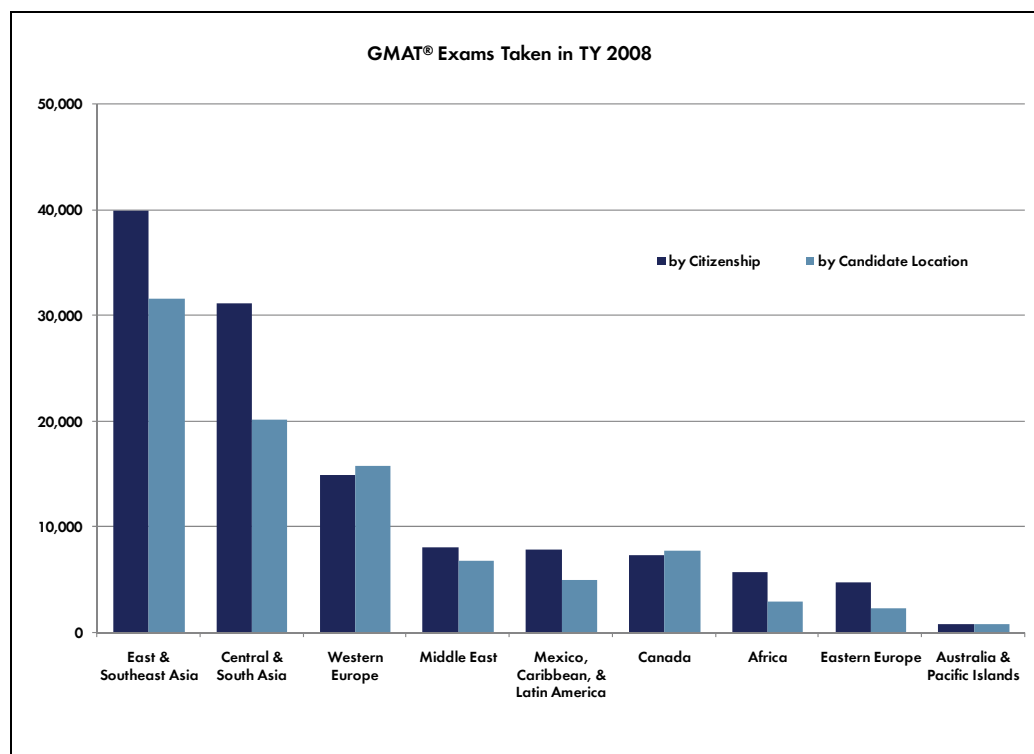
Score report submissions in 10 world regions for testing year 2008 were compared with corresponding score report submissions for testing year 2004. The figures presented in this report summarize TY 2004 (206,852 exams) and TY 2008 (246,957 exams) records data for test takers who took the GMAT exam one or more times during the testing years. (Each testing year begins July 1 and ends June 30.) These examinee data were obtained from the background information questionnaire (BIQ) administered as part of the GMAT exam, score report information from examinee records, and registration information. From these data, both country of citizenship and GMAT score-reporting behavior were used to gauge potential regional trends and changes in examinee preferences with regard to school location.

Up to 10 instances of score report data are stored for every GMAT test taken. For this report, these score reports were aggregated and grouped by school location for both TY 2004 and TY 2008. Geographic region was also used for analysis with examinees grouped into 10 citizenship categories.¹ These categories are shown in the Appendix of this report.

Global Testing Environment

Geographic data collected from TY 2004 to TY 2008 included the examinee’s mailing address at the time of registration and country of citizenship.

Figure 1: GMAT® Exams Taken in TY 2008 (Excluding the US)



¹ In previous versions of this report, Turkey was classified under Western Europe. Due to a change in test vendors and classifications, however, Turkey has been reclassified under the Middle East category. Also, Andorra was previously classified as part of Eastern Europe but has been reclassified as part of Western Europe for the purposes of this report.

Location of GMAT® Examinees

When examinees registered for the GMAT exam in TY 2008, 62% of them resided in the United States, a proportion that decreased from 68% in TY 2004. Globally, Asian residents—including those in East and Southeast Asian countries and Central and South Asian countries—combined to take 21% of worldwide exams in TY 2008. The next-largest proportion of examinees came from Western Europe (6%), Canada (3%), and the Middle East (3%).

In terms of absolute growth, Central and South Asia was the only region to experience four consecutive years of positive testing growth, but every region studied had a higher number of exams taken in TY 2008 when compared with TY 2004.

Table 1: GMAT Exams Taken by Location – TY 2004 to TY 2008

Rank	TY 2004	TY 2005	TY 2006	TY 2007	TY 2008	Percent of TY 2008 Total
1. United States	141,063	135,636	135,303	141,726	153,358	62.1%
2. East & Southeast Asia	22,824	22,612	24,531	26,834	31,610	12.8%
3. Central & South Asia	7,055	8,018	10,162	14,291	20,212	8.2%
4. Western Europe	14,342	14,326	13,552	14,058	15,822	6.4%
5. Canada	7,178	6,413	6,709	6,933	7,761	3.1%
6. Middle East	5,806	5,377	5,578	5,888	6,869	2.8%
7. Mexico, Caribbean, & Latin America	4,026	3,661	4,046	4,352	5,043	2.0%
8. Africa	2,057	2,251	2,191	2,349	2,951	1.2%
9. Eastern Europe	1,947	1,670	1,934	1,879	2,382	1.0%
10. Australia & Pacific Islands	533	526	499	753	868	0.4%
No Response	21	13	4	14	81	0.03%
Total Number of Exams Taken	206,852	200,503	204,509	219,077	246,957	100%

Citizenship of GMAT® Examinees

Clear differences emerge when examining testing data by citizenship, as opposed to candidate location. One of the most significant distinctions was the lower proportion of GMAT exams taken by US citizens in TY 2008. In TY 2008, only 51% of exams taken were by US citizens compared with the 62% of exams taken by US residents.

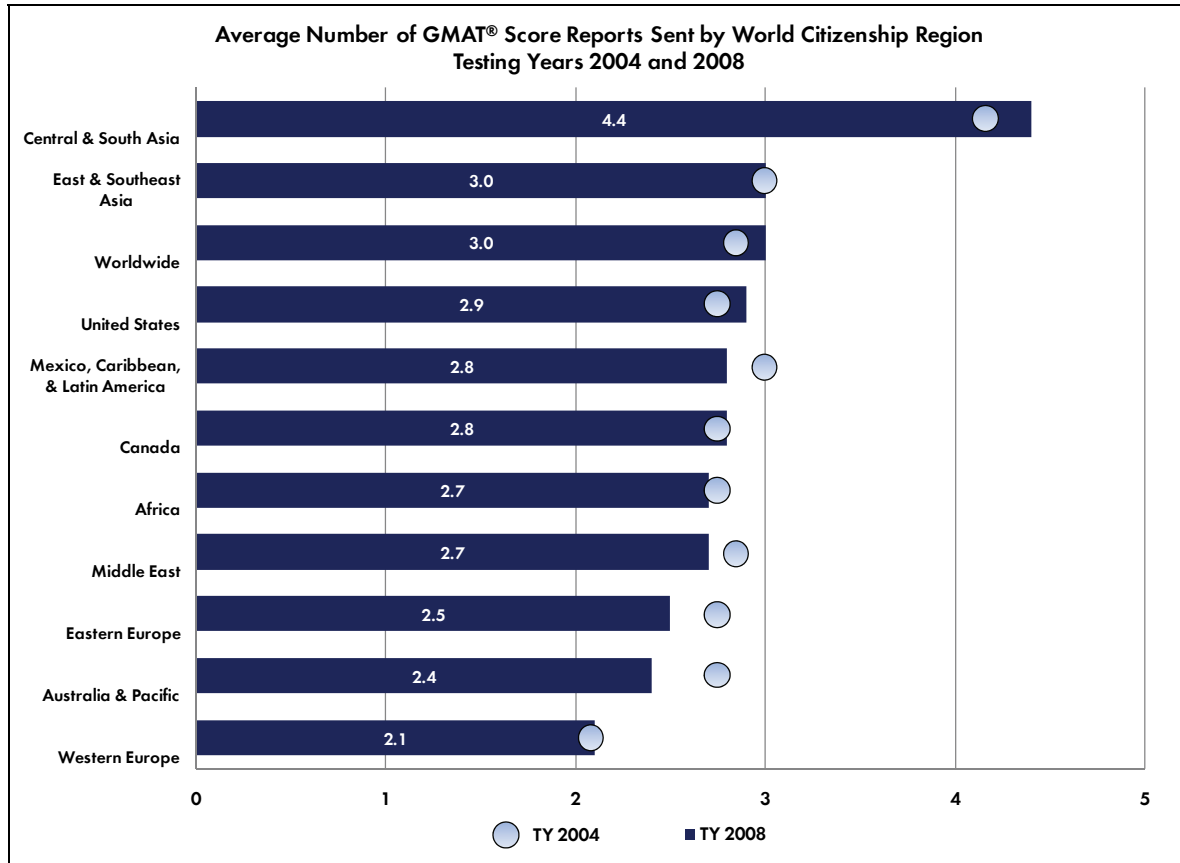
Measured as a proportion of all examinees, the next-largest student pipelines in TY 2008 were citizens of countries in East and Southeast Asia (16%), Central and South Asia (13%), and Western Europe (6%).

The African region and Central and South Asian region both experienced four consecutive years of positive testing growth—and are the only two regions that can boast a continuous increase in the number of tests taken by their citizens since TY 2004. But as with examinee data by location, every citizen region analyzed had a greater number of exams delivered in TY 2008 than in TY 2004.

Table 2: GMAT Exams Taken by Citizenship — TY 2004 to TY 2008

Rank	TY 2004	TY 2005	TY 2006	TY 2007	TY 2008	Percent of TY 2008 Total
1. United States	114,763	110,922	110,696	117,321	126,132	51.1%
2. East & Southeast Asia	30,518	29,770	31,817	34,548	39,986	16.2%
3. Central & South Asia	14,147	15,469	18,636	23,642	31,163	12.6%
4. Western Europe	14,047	13,910	13,022	13,274	14,956	6.1%
5. Middle East	6,615	6,315	6,534	6,996	8,060	3.3%
6. Mexico, Caribbean, & Latin America	7,458	6,673	6,923	7,057	7,923	3.2%
7. Canada	6,283	5,761	6,074	6,400	7,332	3.0%
8. Africa	4,632	4,705	4,748	4,903	5,723	2.3%
9. Eastern Europe	4,145	4,023	4,167	4,079	4,611	1.9%
10. Australia & Pacific Islands	754	615	570	857	874	0.4%
No Response	3,490	2,340	1,322	0	0	0.0%
Total Number of Exams Taken	206,852	200,503	204,509	219,077	246,957	100%

Figure 2: Average Number of GMAT® Score Reports Sent in TY 2004 and TY 2008



Score Reports

The data and analyses in the remainder of this report are based on citizenship of GMAT examinees. Significant regional differences in the average number of score reports sent per GMAT examinee were observed in TY 2008. As a consequence, some citizen groups sent a greater number of score reports relative to others, despite having taken fewer exams in comparison.

Figure 2 shows the average number of score reports sent per examinee in TY 2004 and TY 2008. The extreme examples noted were among citizens of Central and South Asia and Western Europe. Central and South Asian examinees sent, on average, 4.4 score reports per each exam taken in TY 2008. At the other extreme, Western European examinees only sent an average of 2.1 score reports. This behavior explains how Central and South Asian citizens could represent 13% of TY 2008 tests taken, but 18% of total score reports sent.

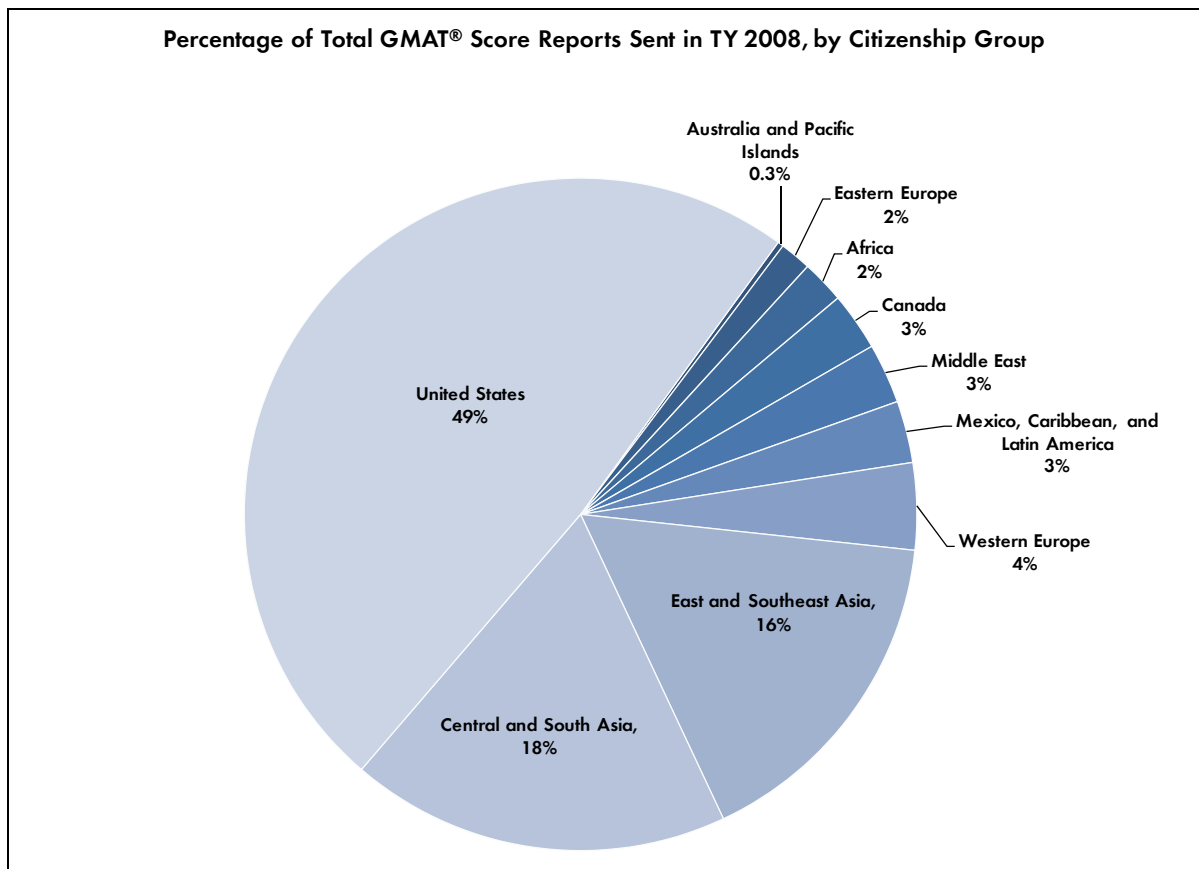
Regional Score-Sending Patterns

The remainder of this report details score-sending patterns for all GMAT examinees worldwide—who collectively sent a total of 745,034 score reports in TY 2008—as well as breakdowns for the following 10 regional subgroups:

- Africa (15,436 scores sent in TY 2008)
- Australia/Pacific Islands (2,096)
- Canada (20,793)
- Central and South Asia (136,061)
- East and Southeast Asia (121,461)
- Eastern Europe (11,313)
- Mexico/Caribbean/Latin America (22,144)
- Middle East (21,499)
- United States (362,657)
- Western Europe (31,090)

Figure 3 shows the percentage of score report submissions in TY 2008 from each of the 10 regional groups studied. A comprehensive list of the countries that make up each region is available in the Appendix.

Figure 3: Citizenship Representation Among GMAT® Score Report Submissions



Worldwide

Nearly 750,000 score reports were sent to schools worldwide by GMAT examinees in TY 2008. This marks a 25% increase from TY 2004 that is due to both broad increases in testing around the globe and a marginal increase in the average number of scores sent by examinees from 2.9 to 3.0.

Table 3: Top 10 Countries by School Location* – All Examinees					
TY 2004 All Examinees			TY 2008 All Examinees		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	501,568	84.05%	1. United States	604,555	81.14%
2. Canada	25,814	4.33%	2. United Kingdom	27,249	3.66%
3. United Kingdom	17,839	2.99%	3. Canada	24,617	3.30%
4. France	10,102	1.69%	4. India	17,762	2.38%
5. Israel	7,417	1.24%	5. France	16,070	2.16%
6. Hong Kong	3,170	0.53%	6. Singapore	10,913	1.45%
7. India	3,117	0.52%	7. Israel	6,450	0.87%
8. Spain	2,831	0.47%	8. Spain	5,112	0.69%
9. Singapore	2,696	0.45%	9. Hong Kong	4,924	0.66%
10. Netherlands	2,676	0.45%	10. Australia	3,397	0.46%
Total Number of Score Reports Sent: 596,767		Avg. # 2.9	Total Number of Score Reports Sent: 745,034		Avg. # 3.0

* Based on number of score reports received.

- GMAT examinees continued to send the majority of their GMAT score reports (81%) to programs in the United States in TY 2008, but the overall proportion of scores sent to the US has declined in recent years. This decline was primarily driven by increased propensity among non-US citizens to send more score reports to non-US schools.
- When excluding US citizen score-sending data (48.7% of total scores sent), the proportion of scores sent by non-US citizens to the United States fell from 75% in TY 2000 to 67% in TY 2004 and then to 65% in TY 2008.
- Programs in India and Singapore experienced the largest absolute increases in number of score reports received between TY 2004 and TY 2008 at 470% and 305%, respectively.
- Western European programs in the United Kingdom, France, and Spain also made substantial gains.
- The only destinations in the top 10 that received fewer score reports in TY 2008 when compared with TY 2004 were Israel (-13%) and Canada (-5%).
- US citizens sent the greatest number of GMAT scores in TY 2008, followed by Indian and Chinese citizens.

Table 4: Top 5 Score-Sending Citizen Groups Worldwide		
Citizen Group	Scores Sent in TY 2008	Percentage of Total
1. United States	363,186	48.7%
2. India	127,916	17.2%
3. China	65,732	8.8%
4. Canada	20,809	2.8%
5. Taiwan	15,496	2.1%
Region Total	745,034	100.0%

US Citizens

US citizens taking the GMAT exam sent the overwhelming majority of their score reports to programs within the United States in TY 2008. The proportion of scores sent to US programs by US citizens has remained greater than 98% in every World Geographic Trend Report that has been released.

Table 5: Top 10 Countries by School Location* — US Citizens					
TY 2004 All US Citizens			TY 2008 All US Citizens		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	315,800	98.43%	1. United States	355,865	98.13%
2. United Kingdom	1,586	0.49%	2. United Kingdom	2,173	0.60%
3. France	899	0.28%	3. France	1,111	0.31%
4. Canada	472	0.15%	4. Spain	773	0.21%
5. Spain	460	0.14%	5. Canada	440	0.12%
6. Switzerland	163	0.05%	6. Switzerland	266	0.07%
7. Netherlands	149	0.05%	7. China	206	0.06%
8. Australia	145	0.05%	8. Italy	180	0.05%
9. Israel	144	0.04%	9. Australia	173	0.05%
10. Italy	120	0.04%	10. Hong Kong	171	0.05%
Total Number of Score Reports Sent by US Citizens: 320,847		Avg. # 2.8	Total Number of Score Reports Sent by US Citizens: 362,657		Avg. # 2.9

* Based on number of score reports received.

- Although US citizens sent a high proportion of their scores to programs inside of the United States in TY 2008, they still sent nearly 7,000 scores to programs outside of the United States.
- Programs in Western Europe successfully attracted many of these scores. Four of the top five non-US countries to which US examinees sent scores in TY 2008 were in Western Europe. The United Kingdom, France, and Spain, for example, captured 60% of US examinee scores sent to programs outside the United States.
- In TY 2004, no Asian countries were among the top 10 destinations for US score reports. By TY 2008, both China (7th) and Hong Kong (10th) made the list by replacing Israel and the Netherlands.

Canadian Citizens

Canadians were one of the few citizen groups in the world that sent a majority of their score reports to domestic programs in TY 2008. The proportion of scores sent to programs in Canada in TY 2008, however, decreased to 60.5% from 64.0% five years earlier. This relative loss in market share by Canadian programs was caused by proportional gains made by programs in other countries, including the United Kingdom, the United States, and France.

Table 6: Top 10 Countries by School Location* – Canadian Citizens

TY 2004 All Canadian Citizens			TY 2008 All Canadian Citizens		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. Canada	11,456	64.09%	1. Canada	12,587	60.53%
2. United States	5,232	29.27%	2. United States	6,243	30.02%
3. United Kingdom	379	2.12%	3. United Kingdom	651	3.13%
4. France	254	1.42%	4. France	426	2.05%
5. Hong Kong	170	0.95%	5. Hong Kong	236	1.13%
6. Spain	66	0.37%	6. Spain	148	0.71%
7. Australia	49	0.27%	7. Switzerland	88	0.42%
8. Netherlands	46	0.26%	8. China	79	0.38%
9. Switzerland	41	0.23%	9. Australia	59	0.28%
10. Germany	22	0.12%	9. Netherlands	59	0.28%
Total Number of Score Reports Sent by Canadian Citizens: 17,874		Avg. # 2.8	Total Number of Score Reports Sent by Canadian Citizens: 20,793		Avg. # 2.8

* Based on number of score reports received.

- Not a single destination in the TY 2008 top 10 experienced an absolute decrease in number of scores received by Canadians between TY 2004 and TY 2008; this is due to a 16% increase in the total number of scores sent over that time.
- In TY 2008, Germany was no longer on the Canadian top 10 list and was replaced by China, which joined Hong Kong as the only other Asian destination on the list.

Western European Citizens²

The score-sending habits of Western European citizens have exhibited significant shifts over the last five years. Most notably, the proportion of scores sent to programs in the United States by Western Europeans continued to decline.

Table 7: Top 10 Countries by School Location* – Western European Citizens					
TY 2004			TY 2008		
All Western European Citizens			All Western European Citizens		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	12,931	42.87%	1. United States	12,368	39.78%
2. United Kingdom	4,553	15.10%	2. United Kingdom	4,547	14.63%
3. France	3,571	11.84%	3. France	4,157	13.37%
4. Greece	1,749	5.80%	4. Spain	1,872	6.02%
5. Spain	1,201	3.98%	5. Netherlands	1,350	4.34%
6. Switzerland	1,029	3.41%	6. Greece	1,227	3.95%
7. Netherlands	994	3.30%	7. Switzerland	1,075	3.46%
8. Portugal	655	2.17%	8. Italy	953	3.07%
9. Canada	639	2.12%	9. Germany	626	2.01%
10. Ireland	515	1.71%	10. Portugal	562	1.81%
Total Number of Score Reports Sent by Western European Citizens: 30,162		Avg. # 2.1	Total Number of Score Reports Sent by Western European Citizens: 31,090		Avg. # 2.1

* Based on number of score reports received.

- Programs in the United States received 4% fewer scores despite a 3% increase in the total number of score reports sent by all Western European examinees in TY 2008 relative to TY 2004.
- Programs in Portugal and Greece also encountered a diminished market share and received fewer score reports from Western European examinees, while gains were realized by programs in Spain, France, and the Netherlands during the period.
- For the first time on record, Canada failed to appear as a top 10 destination for Western European citizens. This left the United States as the only non-Western European destination on the list in TY 2008.
- Score-sending volume was more evenly distributed across countries in Western Europe relative to other regions in TY 2008. For example, France sent the greatest number of scores in the region, but only accounted for 19.5% of total scores sent.

Table 8: Top 5 Score-Sending Citizen Groups in Western Europe		
Citizen Group	Scores Sent in TY 2008	Percentage of Total
1. France	6,048	19.5%
2. Germany	4,741	15.2%
3. United Kingdom	4,545	14.6%
4. Italy	3,478	11.2%
5. Greece	2,483	8.0%
Region Total	31,090	100.0%

² For further information on score-reporting trends in Western Europe, refer to the European Geographic Trend Reports on gmac.com (available at www.gmac.com/GeographicTrends).

Eastern European Citizens³

A reduction in the average number of scores sent per examinee led to a decrease in overall scores sent by Eastern Europeans between TY 2004 and TY 2008. This occurred despite an increase in testing over the past five years.

TY 2004 All Eastern European Citizens			TY 2008 All Eastern European Citizens		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	8,776	74.55%	1. United States	7,286	64.40%
2. United Kingdom	756	6.42%	2. United Kingdom	1,339	11.84%
3. Canada	604	5.13%	3. France	621	5.49%
4. France	456	3.87%	4. Netherlands	377	3.33%
5. Netherlands	212	1.80%	5. Canada	325	2.87%
6. Spain	168	1.43%	6. Spain	279	2.47%
7. Switzerland	153	1.30%	7. Switzerland	225	2.00%
8. Germany	110	0.93%	8. Italy	166	1.47%
9. Hungary	88	0.75%	9. Germany	85	0.75%
10. Italy	78	0.66%	10. Hungary	83	0.73%
Total Number of Score Reports Sent by Eastern European Citizens: 11,772		Avg. # 2.8	Total Number of Score Reports Sent by Eastern European Citizens: 11,313		Avg. # 2.5

* Based on number of score reports received.

- In TY 2004, programs in the United States received 75% of all score reports sent by Eastern Europeans. By TY 2008, this proportion fell to 64% as programs in Western Europe—most notably the United Kingdom, France, and the Netherlands—successfully attracted a greater proportion of scores from Eastern Europeans.
- Canada also lost a substantial share of score reports from Eastern Europeans, falling from 5% in TY 2004 to less than 3% in TY 2008.
- Hungary fell to 10th on the list and remained the only Eastern European country represented.
- Russian citizens accounted for roughly a third of all scores sent from Eastern Europe in TY 2008.

Citizen Group	Scores Sent in TY 2008	Percentage of Total
1. Russian Federation	3,795	33.5%
2. Bulgaria	1,599	14.1%
3. Romania	1,215	10.7%
4. Ukraine	954	8.4%
5. Poland	795	7.0%
Region Total	11,313	100.0%

³ For further information on score-reporting trends in Eastern Europe, refer to the European Geographic Trend Reports on gmac.com (available at www.gmac.com/GeographicTrends).

East and Southeast Asian Citizens^{4,5}

The East and Southeast Asian citizen region was one of only two regions studied in this report wherein the countries that made up the TY 2004 and TY 2008 top 10 study destinations remained the same for both years.

TY 2004 All Citizens of East and Southeast Asia			TY 2008 All Citizens of East and Southeast Asia		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	71,506	77.59%	1. United States	95,747	78.83%
2. Canada	5,715	6.24%	2. United Kingdom	4,697	3.87%
3. United Kingdom	4,041	4.41%	3. Singapore	3,862	3.18%
4. Hong Kong	2,524	2.76%	4. Hong Kong	3,793	3.12%
5. France	1,717	1.88%	5. Canada	3,579	2.95%
6. Singapore	1,512	1.65%	6. France	3,399	2.80%
7. China	1,323	1.44%	7. China	2,509	2.07%
8. Australia	663	0.72%	8. Australia	698	0.57%
9. Netherlands	657	0.72%	9. Netherlands	580	0.48%
10. Japan	346	0.38%	10. Japan	518	0.43%
Total Number of Score Reports Sent by East and Southeast Asian Citizens: 91,573		Avg. # 3.0	Total Number of Score Reports Sent by East and Southeast Asian Citizens : 121,461		Avg. # 3.0

* Based on number of score reports received.

- As a result of recent growth in the number of tests taken by East and Southeast Asian citizens, the number of score reports they sent rose 33% between TY 2004 and TY 2008.
- Programs in the United States increased their market share in this region and remained the preferred destination for scores from East and Southeast Asian examinees. Nearly 79% of all scores sent by Asian examinees were directed to US programs in TY 2008.
- Canada was the only country to experience a significant decline in the proportion of score reports sent by East and Southeast Asian citizens. Programs in Canada received 6% of all East and Southeast Asian examinee score reports in TY 2004, but just 3% in TY 2008.
- Of the 121,461 scores sent by East and Southeast Asian citizens in TY 2008, more than half were sent by Chinese examinees.

Citizen Group	Scores Sent in TY 2008	Percentage of Total
1. China	65,732	54.1%
2. Taiwan	15,496	12.8%
3. Korea, South	14,771	12.2%
4. Thailand	6,127	5.0%
5. Japan	5,876	4.8%
Region Total	121,461	100.0%

⁴ The East and Southeast Asia region was labeled “Asia” in previous reports.

⁵ For further information on score-reporting trends in East and Southeast Asia, refer to the Asian Geographic Trend Reports on gmac.com (available at www.gmac.com/GeographicTrends).

Central and South Asian Citizens^{6,7}

High rates of growth in testing between TY 2004 and TY 2008 resulted in increases in the number of scores sent from this region's citizens to each of the top 10 countries.

Table 13: Top 10 Countries by School Location* — Central and South Asian Citizens

TY 2004 All Citizens of Central and South Asia			TY 2008 All Citizens of Central and South Asia		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	45,406	75.89%	1. United States	87,941	64.63%
2. Canada	3,279	5.48%	2. India	17,556	12.90%
3. United Kingdom	3,203	5.35%	3. United Kingdom	9,631	7.08%
4. India	2,995	5.01%	4. Singapore	6,655	4.89%
5. France	1,336	2.23%	5. France	4,187	3.08%
6. Singapore	989	1.65%	6. Canada	3,932	2.89%
7. Australia	687	1.15%	7. Australia	1,771	1.30%
8. Pakistan	394	0.66%	8. Switzerland	862	0.63%
9. Philippines	300	0.50%	9. Philippines	709	0.52%
10. Switzerland	270	0.45%	10. Spain	668	0.49%
Total Number of Score Reports Sent by Central and South Asian Citizens: 59,835		Avg. # 4.2	Total Number of Score Reports Sent by Central and South Asian Citizens: 136,061		Avg. # 4.4

* Based on number of score reports received.

- Programs in the United States lost 11% of their market share, but still received 94% more score reports from Central and South Asians in TY 2008 when compared with TY 2004. Canada saw a similar trend, losing nearly 3% of its market share while receiving 20% more score reports.
- The market share lost by programs in the United States and Canada was primarily gained by programs in India, Singapore, and the United Kingdom.
- In addition to the rapid growth in number of tests taken in the region since TY 2004, Central and South Asian citizens sent more score reports per examinee in TY 2008 compared with all other regions in this report. Central and South Asian examinees averaged 4.4 score reports; the next highest region, East and Southeast Asia, averaged 3.0.
- Indian examinees sent 94% of total score reports from Central and South Asian citizens in TY 2008 and were responsible for substantial score-sending growth in the region. Central and South Asia's total scores sent increased 127%—the greatest increase of any region studied over this time period.

**Table 14: Top 5 Score-Sending Citizen Groups
in Central and South Asia**

Citizen Group	Scores Sent in TY 2008	Percentage of Total
1. India	127,916	94.0%
2. Pakistan	4,175	3.1%
3. Nepal	1,878	1.4%
4. Bangladesh	925	0.7%
5. Kazakhstan	632	0.5%
Region Total	136,061	100.0%

⁶ The Central and South Asia region was labeled "Central Asia" in previous reports.

⁷ For further information on score-reporting trends in Central and South Asia, refer to the Asian Geographic Trend Reports on gmac.com (available at www.gmac.com/GeographicTrends).

African Citizens

An increase in tests taken by African citizens between TY 2004 and TY 2008 resulted in a greater number of score reports sent from this group to all their top 10 destinations over this period.

TY 2004 All African Citizens			TY 2008 All African Citizens		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	9,990	76.25%	1. United States	10,599	68.66%
2. United Kingdom	823	6.28%	2. United Kingdom	1,528	9.90%
3. Canada	807	6.16%	3. Canada	939	6.08%
4. South Africa	382	2.92%	4. South Africa	585	3.79%
5. France	299	2.28%	5. France	475	3.08%
6. Kenya	263	2.01%	6. Kenya	324	2.10%
7. Egypt	84	0.64%	7. Egypt	296	1.92%
8. Netherlands	83	0.63%	8. Switzerland	101	0.65%
9. Australia	51	0.39%	9. Netherlands	88	0.57%
10. Switzerland	43	0.33%	10. Spain	73	0.47%
Total Number of Score Reports Sent by African Citizens: 13,102		Avg. # 2.8	Total Number of Score Reports Sent by African Citizens: 15,436		Avg. # 2.7

* Based on number of score reports received.

- The proportion of scores sent to US programs in TY 2008 fell to less than 70% for the first time on record as Africans showed increased interest in programs elsewhere, including Africa and Western Europe.
- In TY 2008, African examinees sent 10% of their score reports to programs in the United Kingdom, up from just 6% in TY 2004. They also demonstrated increased interest in programs located in France and Switzerland.
- Within Africa, programs in South Africa and Egypt drew a larger proportion of score reports from African examinees in TY 2008 when compared with TY 2004.
- Nigerian citizens represented nearly a third of the score reports sent by this region in TY 2008.

Citizen Group	Scores Sent in TY 2008	Percentage of Total
1. Nigeria	4,820	31.2%
2. Kenya	1,848	12.0%
3. Ghana	1,520	9.8%
4. Morocco	533	3.5%
5. Cameroon	496	3.2%
Region Total	15,436	100.0%

Middle Eastern Citizens

Despite a decrease in the average number of score reports sent by Middle Eastern examinees, the absolute number of scores sent increased 13% from TY 2004 due to substantial testing growth.

TY 2004 All Citizens of the Middle East			TY 2008 All Citizens of the Middle East		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	7,960	41.59%	1. United States	9,673	44.99%
2. Israel	6,830	35.93%	2. Israel	6,206	28.87%
3. Canada	952	5.01%	3. Canada	1,222	5.68%
4. Turkey	832	4.38%	4. United Kingdom	1,050	4.88%
5. United Kingdom	703	3.70%	5. France	816	3.80%
6. France	557	2.93%	6. Turkey	804	3.74%
7. Lebanon	453	2.38%	7. Lebanon	524	2.44%
8. United Arab Emirates	138	0.73%	8. Spain	275	1.28%
9. Germany	100	0.53%	9. Netherlands	158	0.73%
10. Netherlands	85	0.45%	10. Italy	140	0.65%
Total Number of Score Reports Sent by Middle Eastern Citizens: 19,010		Avg. # 2.9	Total Number of Score Reports Sent by Middle Eastern Citizens: 21,499		Avg. # 2.7

* Based on number of score reports received.

- Many regional programs—most notably those in Israel, Turkey, and Lebanon—continued to be successful at retaining a significant number of their local talent relative to other world regions. This ability did diminish slightly in TY 2008, however, as the proportion of all scores sent by Middle Eastern citizens to programs in the Middle East declined.
- Programs in Israel experienced the largest declines from Middle Eastern examinees. In TY 2004, 36% of regional scores went to Israel—by TY 2008, only 29% went there.
- An increased interest from Middle Eastern citizens for programs located in the United States and Western Europe was responsible for this decline in Middle Eastern market share.
- Two-thirds of all GMAT scores sent from the Middle East region were sent by citizens of Israel and Turkey in TY 2008.

Citizen Group	Scores Sent in TY 2008	Percentage of Total
1. Israel	8,891	41.4%
2. Turkey	5,556	25.8%
3. Lebanon	2,244	10.4%
4. Saudi Arabia	1,626	7.6%
5. Iran	1,625	7.6%
Region Total	21,499	100.0%

Australian and Pacific Island Citizens

Despite a modest increase in testing, a significant drop in the average number of scores sent by Australian and Pacific Island examinees left the total number of scores sent in TY 2004 and TY 2008 essentially equal.

TY 2004 All Australian/Pacific Island Citizens			TY 2008 All Australian/Pacific Island Citizens		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	1,221	58.14%	1. United States	1,069	51.00%
2. Australia	346	16.48%	2. Australia	362	17.27%
3. United Kingdom	234	11.14%	3. United Kingdom	294	14.03%
4. France	108	5.14%	4. France	121	5.77%
5. Canada	34	1.62%	5. Hong Kong	52	2.48%
6. New Zealand	33	1.57%	6. Singapore	32	1.53%
7. Switzerland	32	1.52%	7. Switzerland	30	1.43%
8. Hong Kong	22	1.05%	8. India	28	1.34%
9. Spain	14	0.67%	9. Canada	26	1.24%
10. Singapore	13	0.62%	10. Spain	23	1.10%
Total Number of Score Reports Sent by Australian/Pacific Island Citizens: 2,100		Avg. # 2.8	Total Number of Score Reports Sent by Australian/Pacific Island Citizens: 2,096		Avg. # 2.4

* Based on number of score reports received.

- During this period, the proportion of scores sent to programs in the United States by Australian and Pacific Island citizens fell seven percentage points to 51%.
- Programs in Canada and Switzerland experienced less severe decreases.
- Increased interest in programs located in the United Kingdom raised the proportion of scores sent there to 14% from just 11% in TY 2004.
- Although emerging from very low levels in TY 2004, programs in Hong Kong, Singapore, and India received significant increases in score reports from Australian and Pacific Island examinees by TY 2008.
- Citizens of Australia and New Zealand sent nearly all scores from the region in TY 2008.

Citizen Group	Scores Sent in TY 2008	Percentage of Total
1. Australia	1,656	79.0%
2. New Zealand	399	19.0%
3. Fiji	26	1.2%
4. Marshall Islands	5	0.2%
5. Papua New Guinea	5	0.2%
Region Total	2,096	100.0%

Mexican, Caribbean, and Latin American Citizens

With the exception of a transfer in market share between the United States and Canada, the score-sending preferences of Mexican, Caribbean, and Latin American examinees in TY 2008 were very similar to their preferences in TY 2004.

Table 21: Top 10 Countries by School Location* – Mexican/Caribbean/Latin American Citizens

TY 2004 All Mexican/Caribbean/ Latin American citizens			TY 2008 All Mexican/Caribbean/ Latin American citizens		
Country/Region	Scores Sent	Percent	Country/Region	Scores Sent	Percent
1. United States	16,873	76.54%	1. United States	17,395	78.55%
2. Canada	1,371	6.22%	2. United Kingdom	1,305	5.89%
3. United Kingdom	1,251	5.67%	3. Canada	987	4.46%
4. France	691	3.13%	4. France	750	3.39%
5. Spain	527	2.39%	5. Spain	596	2.69%
6. Brazil	254	1.15%	6. Switzerland	188	0.85%
7. Netherlands	185	0.84%	7. Brazil	166	0.75%
8. Germany	141	0.64%	8. Netherlands	123	0.56%
9. Mexico	133	0.60%	9. Germany	98	0.44%
10. Switzerland	128	0.58%	10. Italy	95	0.43%
Total Number of Score Reports Sent by Mexican/Caribbean/Latin American Citizens: 22,044		Avg. # 3.0	Total Number of Score Reports Sent by Mexican/Caribbean/Latin American Citizens: 22,144		Avg. # 2.8

* Based on number of score reports received.

- Very few score reports sent by Mexican, Caribbean, and Latin American examinees remained in the region in TY 2008. Brazil was the only regional country represented in the top 10, and Brazil received less than 1% of all scores sent in TY 2008.
- Programs in the United States remained the primary destination for Mexican, Caribbean, and Latin American examinees. The proportion of score reports sent to the United States increased from 76.5% in TY 2004 to 78.5% in TY 2008.
- This increase was realized at the expense of programs in Canada, which received 4.5% of all score reports in TY 2008, compared with 6.2% in TY 2004.
- More than half of all scores sent from the region were sent by citizens of Brazil, Mexico, and Colombia in TY 2008.

Table 22: Top 5 Score-Sending Citizen Groups in Mexico /Caribbean/Latin America

Citizen Group	Scores Sent in TY 2008	Percentage of Total
1. Brazil	4,961	22.4%
2. Mexico	4,652	21.0%
3. Colombia	2,457	11.1%
4. Peru	1,621	7.3%
5. Venezuela	1,564	7.1%
Region Total	22,144	100.0%

Frequently Asked Questions

Is there a relationship between economic conditions and the demand for management education?

It is often asserted that higher education is counter-cyclical because, as labor markets deteriorate, individuals face a lower opportunity cost leaving the workforce and decide to return to school until conditions improve. Historic GMAT volume data provide evidence to support this belief. Each of the previous US recessions since 1980—that of 1980, 1981–1982, 1990–1991, and 2001—has corresponded with peaked or peaking GMAT testing volume. A similar relationship is observed with the current recession, which according to the National Bureau of Economic Research (NBER), began in December 2007. Economic conditions are not the only factor influencing demand for management education but clearly alter the incentive structure facing prospective business students.

Has the GMAT examinee pipeline changed in recent years?

The number of GMAT exams taken around the world has increased in each testing year since 2005 and has been driven by rapid growth from non-US citizens. By TY 2008, only 51.1% of global exams were taken by US citizens, a proportion down from 55.5% in TY 2004. This is not due to a decrease in testing by US citizens, but rather a slower rate of growth relative to non-US examinees.

Where is testing growth the most pronounced?

Citizens of Asian countries—most notably India and China—have been largely responsible for the substantial testing growth seen in recent years, although each region identified in this report experienced an increase in the number of GMAT exams taken between TY 2007 and TY 2008. Of the top 20 citizen groups to take the GMAT in TY 2008, five have averaged annual testing growth of more than 10% since TY 2004—India (24%), Italy (19%), China (18%), Singapore (16%), and Brazil (10%).

There are fewer score reports being sent to US schools by Western European citizens. Is this due to the Bologna Accord?

From TY 2000 to TY 2008, the percentage of score reports sent to US schools by Western European citizens decreased from 60% to 40%. While some of this may be due to the Bologna Accord, a number of factors could be affecting this trend, such as changing demographics, increasing regional program options, and better job opportunities available closer to home. The full impact of the Bologna Accord, which is an ongoing process to establish a European Higher Education Area (EHEA), might not be known for several years.

The report mentions there are fewer score reports being sent to US schools by Central and South Asian citizens. My school has not noticed a drop in applications from Indian citizens, which make up the vast majority of this region. Why is that?

While it is true that the proportion of scores sent to US schools by Indian examinees has fallen, from 77% in TY 2004 to 64% in TY 2008, the absolute number of score reports going to the United States has risen significantly due to large testing increases among Indian citizens. In fact, between TY 2004 and TY 2008, the total number of score reports sent by Indian examinees to schools in the United States nearly doubled despite the decrease in market share.

I would like to find out more information. Where do I go?

If you have additional questions about this and other reports in our series, please email research@gmac.com. To find out more information about additional reports available, please visit www.gmac.com/ResearchandTrends.

Authorship

The following individuals made significant contributions to the concept and design or analysis and interpretation of data and the drafting/revising of the manuscript for intellectual content: Alex Chisholm, Senior Research Analyst, GMAC; Courtney Defibaugh, Research Analyst, GMAC.

Contact Information

For questions or comments regarding study findings, methodology or data, please contact the GMAC Research and Development department at research@gmac.com.

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Appendix: Regional Categories

AFRICA

Algeria	Gambia, The	Nigeria
Angola	Ghana	Rwanda
Benin	Guinea	Senegal
Botswana	Kenya	Seychelles
Burkina Faso	Lesotho	Sierra Leone
Burundi	Liberia	Somalia
Cameroon	Libya	South Africa
Cape Verde	Madagascar	Sudan
Chad	Malawi	Swaziland
Congo, Dem. Rep. of the	Mali	Tanzania
Congo, Republic of the	Mauritania	Togo
Cote D'ivoire (Ivory Coast)	Mauritius	Tunisia
Egypt	Morocco	Uganda
Eritrea	Mozambique	Zambia
Ethiopia	Namibia	Zimbabwe
Gabon	Niger	

AUSTRALIA & PACIFIC ISLANDS

American Samoa	Kiribati	Palau
Australia	Marshall Islands	Tonga
Christmas Island	Papua New Guinea	Samoa
Fiji	New Zealand	

CANADA

Canada

CENTRAL & SOUTH ASIA *

Afghanistan	Kazakhstan	Tajikistan
Bangladesh	Kyrgyzstan	Turkmenistan
Bhutan	Nepal	Uzbekistan
India	Pakistan	

***Note:** The Central and South Asia region was labeled “Central Asia” in previous reports.

EAST & SOUTHEAST ASIA *

Brunei	Korea, Rep. of (South)	Philippines
Cambodia	Laos	Singapore
China, People’s Republic	Macau (SAR of China)	Sri Lanka
Hong Kong	Malaysia	Taiwan
Indonesia	Maldives	Thailand
Japan	Myanmar (Burma)	Vietnam
Korea, D.P.R. of (North)	Mongolia	

***Note:** The East and Southeast Asia region was labeled “Asia” in previous reports.

EASTERN EUROPE

Albania	Estonia	Romania
Armenia	Georgia	Russia
Azerbaijan	Hungary	Serbia
Bosnia-Herzegovina	Latvia	Slovakia
Bulgaria	Lithuania	Slovenia
Belarus	Macedonia, The F.Y.R. of	Ukraine
Croatia	Moldova	Yugoslavia
Czech Republic	Poland	

MEXICO, CARIBBEAN, AND LATIN AMERICA

Antigua and Barbuda	Cuba	Nicaragua
Argentina	Dominica, Commonwealth	Panama
Bahamas	Dominican Republic	Paraguay
Barbados	Ecuador	Peru
Belize	El Salvador	St. Kitts
Bermuda	Grenada	St. Lucia
Bolivia	Guatemala	St. Vincent and The Grenandines
Brazil	Guyana	Suriname
Cayman Islands	Haiti	Trinidad and Tobago
Chile	Honduras	Turks and Caicos Islands
Colombia	Jamaica	Uruguay
Costa Rica	Mexico	Venezuela

MIDDLE EAST

Bahrain
Gaza Strip
Iran
Iraq
Israel

Jordan
Kuwait
Lebanon
Oman
Saudi Arabia

Syria
Turkey
United Arab Emirates
West Bank
Yemen

UNITED STATES

United States of America

WESTERN EUROPE

Andorra
Austria
Belgium
Cyprus
Denmark
Finland
France
Germany

Greece
Iceland
Ireland
Italy
Liechtenstein
Luxembourg
Malta
Monaco

Netherlands
Norway
Portugal
Spain
Sweden
Switzerland
United Kingdom

Get Even More Data to Inform Your Decisions

Savvy graduate management education professionals use GMAC® research every day to make informed business decisions. Rich data offer customizable insights into key issues that affect your recruitment success. Detailed research reports track important trends in graduate management admissions. Here are just three of the available resources:

1. The *Profile of Graduate Management Admission Test Candidates* is a rich source of significant demographic data about GMAT® examinees over the past five years. It's ideal for gauging the size and characteristics of your business school's potential applicant pool. The book can be used to find testing volume and mean GMAT Total scores by gender, undergraduate major, location, age group, citizenship, US state, intended study pace, US subgroup, and attending institution.

Free electronic copies of the *Profile* are available at www.gmac.com/GMATProfile.

2. The *GMAC Survey Series* comprises five annual or biannual surveys of individuals in the graduate management education industry. The surveys explore issues relevant to graduate management programs, prospective graduate business students, recent alumni, and corporate recruiters, offering data at various depths, depending on the desire of the user and the participation of the school. Survey reports not only provide an overview of the data, they give context for and implications of the research. These reports frequently help drive strategic decision-making processes in graduate business schools.

All survey reports are available free on the Web at www.gmac.com/surveys.

Contact research@gmac.com for more information on how to participate in these surveys or to request free print copies of the survey reports (while supplies last).

3. *Geographic Trend Reports for GMAT Examinees* compare score-sending patterns of examinees and their geographic and biographical data from the most recent testing year against the data from four years earlier. First introduced as part of the Research Report Series, the Geographic Trend Reports were separated into their own series in response to requests for annual updates and specialized reports on individual regions, including Asia, Europe and North America.

More Geographic Trend Reports are available on the Web at www.gmac.com/GeographicTrends.

WORLD

Geographic Trend Report for GMAT[®] Examinees

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Are new countries emerging as preferred destinations for graduate management education?

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1600 Tysons Boulevard
Suite 1400
McLean, Virginia 22102 USA
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