

2009 WORLD

Geographic Trend Report for GMAT® Examinees



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The *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 after 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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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 2005 and 2009 testing years (TY), including the requested destination of their score reports.

The GMAT score-sending data studied for this update reveal two important types of information relating to the geographic program preferences of examinees. First is *absolute* change in the overall number of GMAT score reports that are sent each year, which reflects the physical size of the annual student pipeline. Absolute change tends to fluctuate widely depending on yearly testing volume. The second type of information is *relative* change, which 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 2005 and TY 2009 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

- In TY 2009 there were 265,613 GMAT exams taken around the world, a level that represented the largest annual total in the history of the exam. Beyond reaching record numbers, data from TY 2009 also reveal the growing international representation within the GMAT student pipeline, showing that for the first time the majority of examinees sitting for the GMAT exam were non-US citizens.
- GMAT examinees sent 801,504 score reports to business schools around the world in TY 2009. This marks an increase of more than 230,000 score reports from TY 2005, which is explained both by significant increases in global testing and by a slight increase in the average number of scores sent by examinees from 2.8 to 3.0.
- The number of GMAT score reports received by business schools located outside of the United States has increased more than 90 percent since TY 2005. Of the leading global destinations for GMAT score reports, business schools in India (+343%), Singapore (+332%), and Spain (+139%) each received more than twice as many score reports in TY 2009 than they did in TY 2005.
- Although programs in the United States continue to be the preferred destination for the majority of GMAT examinees, business schools in the United States have experienced a reduction in global market share over the previous five years. For nine of the 10 citizen regions studied in this report, there was a proportional shift away from US programs between TY 2005 and TY 2009. Because of broad increases in global testing, however, the absolute number of score reports going to US schools has continued to rise.

Methodology

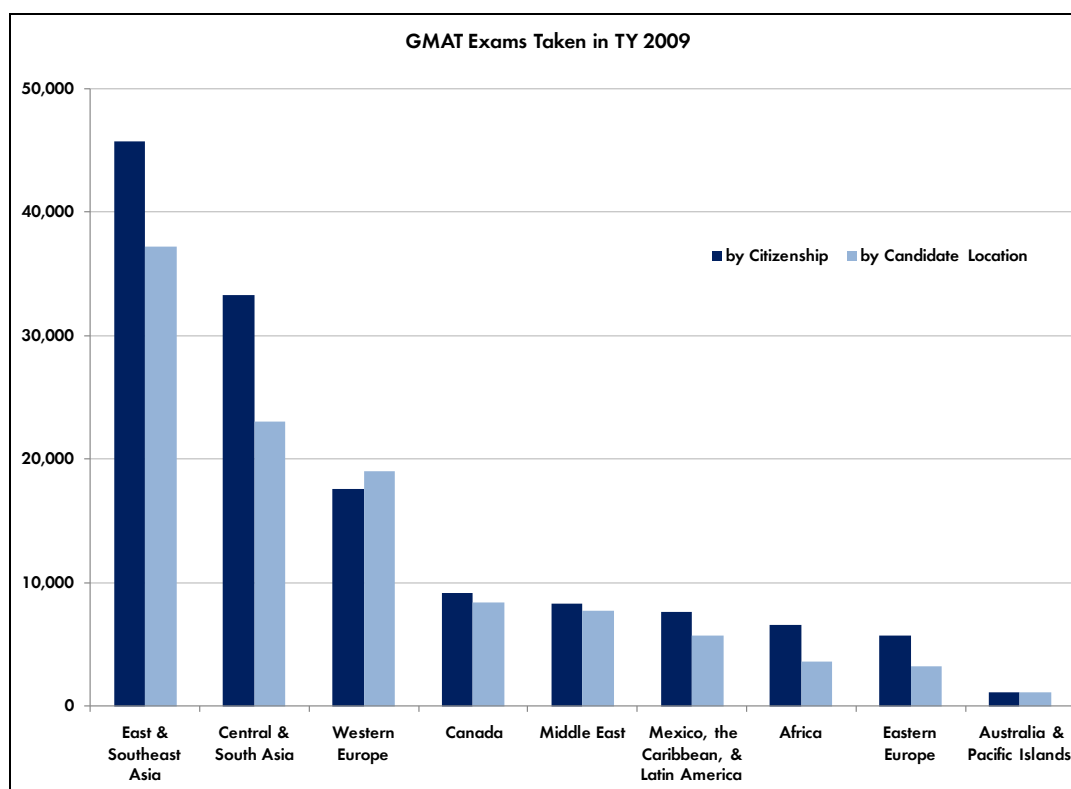
Score report submissions in 10 world regions for testing year 2009 were compared with corresponding score report submissions for testing year 2005. The figures presented in this report summarize TY 2005 (200,503 exams) and TY 2009 (265,613 exams) records data for test takers who took the GMAT exam one or more times during the testing years.¹ 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 2005 and TY 2009. We also analyzed score report data by geographic region, grouping examinees into 10 citizenship categories. These categories are shown in the Appendix of this report.

Global Testing Environment

Geographic data collected from TY 2005 to TY 2009 included the examinee's mailing address at the time of registration and country of citizenship. Figure 1 presents the GMAT testing landscape for TY 2009.

Figure 1: GMAT Exams Taken in TY 2009 (Excluding the United States)



¹ Testing years run from July 1 of the preceding year to June 30 of the current year. Thus, TY 2009 is July 1, 2008 to June 30, 2009.

Location of GMAT Examinees

Of the 265,613 exams taken in TY 2009, 59 percent were taken by examinees residing in the United States at the time of GMAT registration. This marks the first time that the proportion dipped below 60 percent and is significantly lower than the 68 percent that was observed in TY 2005.

Globally, Asian residents—including those in East and Southeast Asian countries (14%) and Central and South Asian countries (9%)—combined to take 23 percent of worldwide exams in TY 2009. The next-largest proportion of examinees came from Western Europe (7%), Canada (3%), and the Middle East (3%).

Every region studied in this report had a higher number of GMAT exams taken in TY 2009 when compared with TY 2005.

Table 1: GMAT Exams Taken by Location — TY 2005 to TY 2009

Rank	TY 2005	TY 2006	TY 2007	TY 2008	TY 2009	Percentage of TY 2009 Total
1. United States	135,636	135,303	141,726	153,358	156,613	58.96%
2. East & Southeast Asia	22,612	24,531	26,834	31,610	37,226	14.02%
3. Central & South Asia	8,018	10,162	14,291	20,212	23,070	8.69%
4. Western Europe	14,326	13,552	14,058	15,822	19,019	7.16%
5. Canada	6,413	6,709	6,933	7,761	8,366	3.15%
6. Middle East	5,377	5,578	5,888	6,869	7,701	2.90%
7. Mexico, Caribbean, & Latin America	3,661	4,046	4,352	5,043	5,663	2.13%
7. Africa	2,251	2,191	2,349	2,951	3,598	1.35%
9. Eastern Europe	1,670	1,934	1,879	2,382	3,250	1.22%
10. Australia & Pacific Islands	526	499	753	868	1,107	0.42%
No Response	13	4	14	81	0	0.00%
Total Number of Exams Taken	200,503	204,509	219,077	246,957	265,613	100%

Citizenship of GMAT Examinees

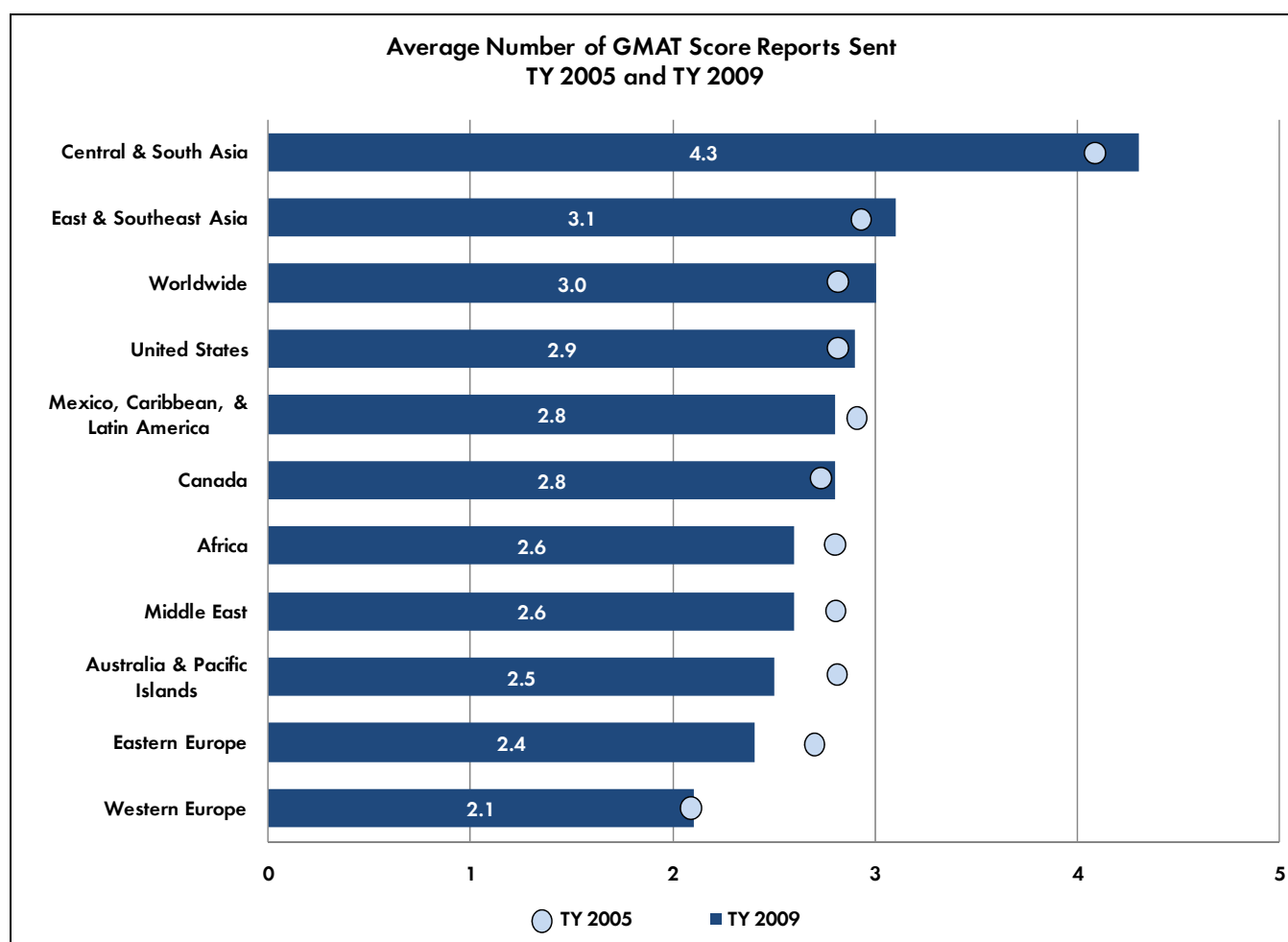
When examining testing data by citizenship, as opposed to candidate location, the GMAT student pipeline appears even more internationally diverse. In TY 2009, only 49 percent of exams were taken by US citizens. This marks the first time in the history of the GMAT that the majority of exams in a given testing year were taken by non-US citizens.

As with examinee data by candidate location, every region studied in this report experienced increases in the number of GMAT exams taken between TY 2005 and TY 2009.

Table 2: GMAT Exams Taken by Citizenship — TY 2005 to TY 2009

Rank	TY 2005	TY 2006	TY 2007	TY 2008	TY 2009	Percentage of TY 2009 Total
1. United States	110,922	110,696	117,321	126,132	130,508	49.13%
2. East & Southeast Asia	29,770	31,817	34,548	39,986	45,774	17.23%
3. Central & South Asia	15,469	18,636	23,642	31,163	33,322	12.55%
4. Western Europe	13,910	13,022	13,274	14,956	17,556	6.61%
5. Middle East	6,315	6,534	6,996	8,060	9,171	3.45%
6. Mexico, Caribbean, & Latin America	6,673	6,923	7,057	7,923	8,334	3.14%
7. Canada	5,761	6,074	6,400	7,332	7,621	2.87%
8. Africa	4,705	4,748	4,903	5,723	6,562	2.47%
9. Eastern Europe	4,023	4,167	4,079	4,611	5,668	2.13%
10. Australia & Pacific Islands	615	570	857	874	1,097	0.41%
No Response	2,340	1,322	0	197	0	0.00%
Total Number of Exams Taken	200,503	204,509	219,077	246,957	265,613	100%

Figure 2: GMAT Score Reports Sent, per Examinee, by World Citizenship Region



Score Reports

Significant regional differences in terms of the average number of score reports sent per examinee are observed in the GMAT student pipeline. As a consequence, some citizen groups sent a greater number of score reports relative to others, despite having taken comparatively fewer exams.

Figure 2 shows the average number of score reports sent per examinee in TY 2005 and TY 2009. On average, citizens of Central and South Asia sent the greatest number of score reports in TY 2009 with 4.3 per examinee. At the other end of the spectrum, Western European examinees sent an average of only 2.1 score reports per examinee.

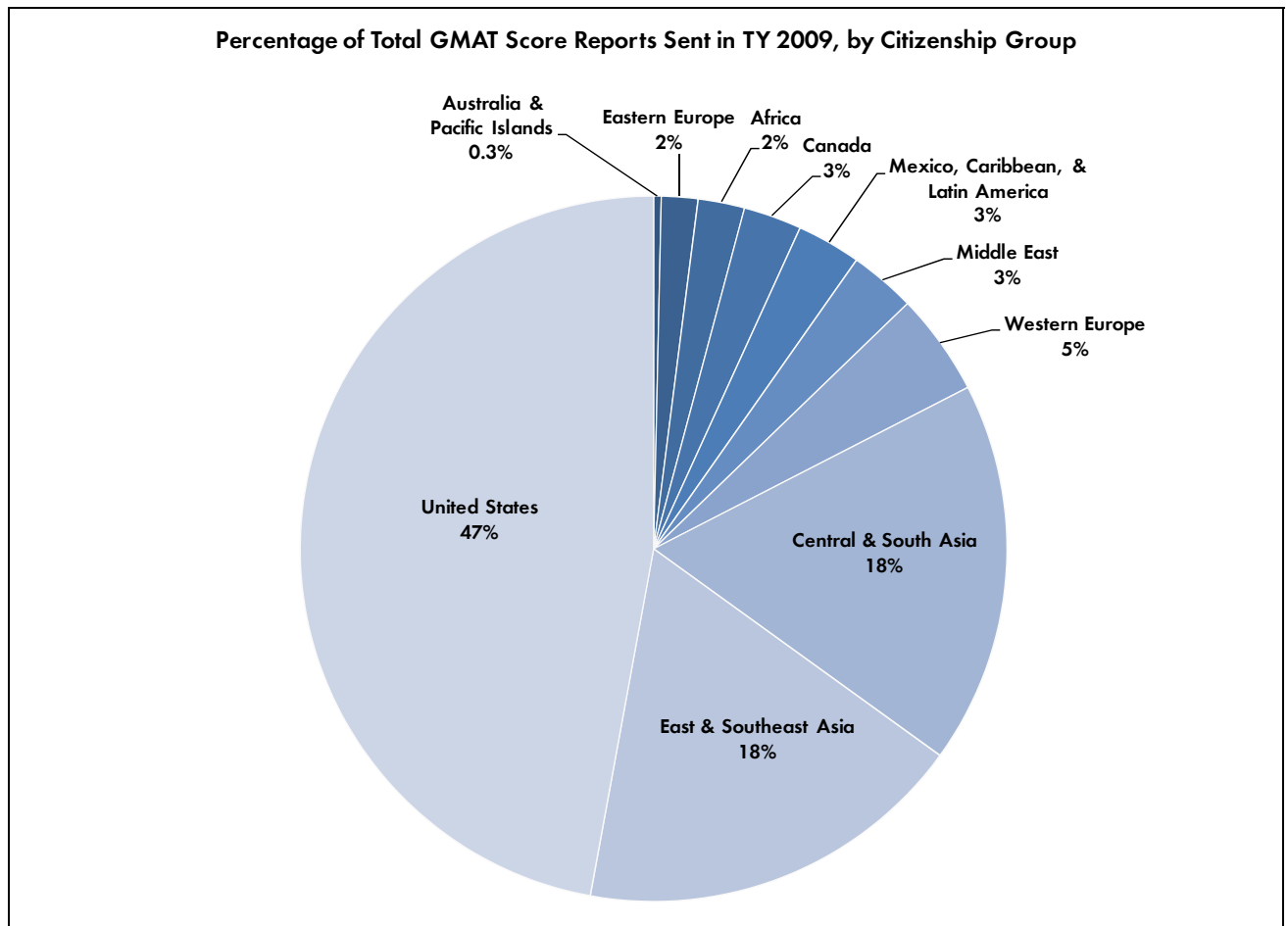
Regional Score-Sending Patterns

The remainder of this report details score-sending patterns for all GMAT examinees worldwide—who collectively sent a total of 801,504 score reports in TY 2009—as well as breakdowns for the following 10 regional subgroups:

- Africa (17,051 scores sent in TY 2009)
- Australia and Pacific Islands (2,771)
- Canada (21,311)
- Central and South Asia (143,518)
- East and Southeast Asia (140,464)
- Eastern Europe (13,389)
- Mexico/Caribbean/Latin America (23,507)
- Middle East (24,247)
- United States (377,742)
- Western Europe (37,504)

Figure 3 shows the percentage of score report submissions in TY 2009 from each of the 10 regional groups studied. A comprehensive list of the countries in each region is available in the Appendix.

Figure 3: Citizenship Representation Among GMAT Score Report Submissions



Worldwide

GMAT examinees sent a total of 801,504 score reports to business schools around the world in TY 2009. This represents an increase of more than 230,000 from TY 2005, which is explained both by significant increases in global testing and by a slight increase from 2.8 to 3.0 in the average number of scores sent by examinees.

Table 3: Top 10 Countries by School Location *—All Examinees

TY 2005 All Examinees			TY 2009 All Examinees		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	476,197	83.90%	1. United States	628,431	78.41%
2. Canada	21,230	3.74%	2. United Kingdom	33,621	4.19%
3. United Kingdom	16,735	2.95%	3. Canada	27,005	3.37%
4. France	9,741	1.72%	4. India	22,458	2.80%
5. Israel	7,143	1.26%	5. France	19,191	2.39%
6. India	5,064	0.89%	6. Singapore	13,271	1.66%
7. Hong Kong	3,409	0.60%	7. Israel	6,789	0.85%
8. Singapore	3,074	0.54%	8. Spain	6,747	0.84%
9. Spain	2,821	0.50%	9. Hong Kong	6,731	0.84%
10. Greece	2,466	0.43%	10. Australia	5,256	0.66%
Total Number of Score Reports Sent: 567,004		Avg. # 2.8	Total Number of Score Reports Sent: 801,504		Avg. # 3.0

* Based on number of score reports received.

- In TY 2009, the proportion of GMAT score reports (78%) sent to the United States dropped below 80 percent for the first time. This proportion is down from 88 percent in TY 2000 and 84 percent in TY 2005. A faster rate of testing growth among non-US examinees in the GMAT pipeline is driving this trend, along with an increased propensity among this group to send more score reports to programs outside of the United States.
- Non-US citizens sent 41 percent of their score reports to programs outside of the United States in TY 2009, a proportion that is up from 35 percent in TY 2005. For the first time, this proportion surpassed 40 percent, due in part to new opportunities generated by growth in the number of GMAT-using business programs around the globe.
- Due in part to aggregate testing growth since TY 2005, business schools in each country that were represented in the TY 2009 top-10 destination list—with the exception of Israel—received a greater number of score reports when compared with five years prior.
- Programs in India and Singapore experienced the largest percentage increases in the number of score reports received between TY 2005 and TY 2009 at 343 percent and 332 percent, respectively. Programs in several Western European countries also made substantial gains.

Table 4: Top 5 Score-Sending Citizen Groups Worldwide

Citizen Group	Scores Sent in TY 2009	Percentage of Total
1. United States	377,742	47.13%
2. India	134,885	16.83%
3. China	85,794	10.70%
4. Canada	21,311	2.66%
5. Taiwan	15,769	1.97%
Region Total	801,504	100%

Canadian Citizens

Canadians were one of the few citizen groups in the world in TY 2009 that sent a majority of their score reports to domestic programs. The proportion of scores sent to programs in Canada by Canadian examinees was 61.4 percent, essentially unchanged from the proportion sent in TY 2005.

Table 5: Top 10 Countries by School Location*—Canadian Citizens					
TY 2005 All Canadian Citizens			TY 2009 All Canadian Citizens		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. Canada	9,559	61.68%	1. Canada	13,093	61.44%
2. United States	4,870	31.43%	2. United States	6,084	28.55%
3. United Kingdom	348	2.25%	3. United Kingdom	679	3.19%
4. France	269	1.74%	4. France	481	2.26%
5. Hong Kong	148	0.96%	5. Hong Kong	256	1.20%
6. Spain	55	0.35%	6. Spain	190	0.89%
7. Switzerland	45	0.29%	7. China	71	0.33%
8. Australia	33	0.21%	8. Switzerland	60	0.28%
9. Netherlands	28	0.18%	8. Netherlands	60	0.28%
10. Italy	13	0.08%	10. Australia	51	0.24%
Total Number of Score Reports Sent by Canadian Citizens: 15,497		Avg. # 2.7	Total Number of Score Reports Sent by Canadian Citizens: 21,311		Avg. # 2.8

* Based on number of score reports received.

- The top six destinations to which Canadian examinees sent score reports in TY 2009 were identical to TY 2005. The only difference within this group was a minor shift away from US programs in favor of schools in Western Europe and Hong Kong.
- By TY 2009, Italy 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.

Mexican, Caribbean, and Latin American Citizens

The score-sending preferences of citizens from Mexico, the Caribbean, and Latin America remained essentially unchanged between TY 2005 and TY 2009.

Table 6: Top 10 Countries by School Location *—Mexican/Caribbean/Latin American Citizens

TY 2005 All Mexican, Caribbean, & Latin American Citizens			TY 2009 All Mexican, Caribbean, & Latin American Citizens		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	14,780	77.64%	1. United States	17,797	75.71%
2. Canada	1,113	5.85%	2. United Kingdom	1,594	6.78%
3. United Kingdom	908	4.77%	3. Canada	1,075	4.57%
4. France	641	3.37%	4. France	954	4.06%
5. Spain	453	2.38%	5. Spain	685	2.91%
6. Brazil	230	1.21%	6. Brazil	218	0.93%
7. Switzerland	153	0.80%	7. Switzerland	210	0.89%
8. Germany	149	0.78%	8. Australia	184	0.78%
9. Netherlands	133	0.70%	9. Netherlands	161	0.68%
10. Mexico	132	0.69%	10. Italy	119	0.51%
Total Number of Score Reports Sent by Mexican, Caribbean, & Latin American Citizens: 19,037		Avg. # 2.9	Total Number of Score Reports Sent by Mexican, Caribbean, & Latin American Citizens: 23,507		Avg. # 2.8

* Based on number of score reports received.

- Programs in the United States continue to be the primary destination for Mexican, Caribbean, and Latin American examinees. The proportion of score reports sent to the United States, however, decreased slightly from 78 percent in TY 2005 to 76 percent in TY 2009.
- Interest in business schools located in the United Kingdom increased over the last five years, as programs there received 7 percent of total scores sent from the region in TY 2009, up from 5 percent in TY 2005. On the other hand, interest in Canada as a study destination decreased marginally.
- Very few score reports sent by Mexican, Caribbean, and Latin American examinees remained in the region in TY 2009. Brazil was the only regional country represented in the top 10, yet programs there received less than 1 percent of total scores sent by citizens of the region.
- Nearly 60 percent of GMAT score reports sent from the region in TY 2009 were generated by citizens of Brazil, Mexico, and Colombia.

Table 7: Top 5 Score-Sending Citizen Groups in Mexico /Caribbean/Latin America

Citizen Group	Scores Sent in TY 2009	Percentage of Total
1. Mexico	5,860	24.93%
2. Brazil	4,865	20.70%
3. Colombia	3,014	12.82%
4. Chile	1,568	6.67%
5. Peru	1,516	6.45%
Region Total	23,507	100%

US Citizens

Examinees from the United States sent 24 percent more GMAT[®] score reports in TY 2009 when compared with TY 2005. Over this time, the score-sending preferences among US examinees remained relatively consistent, as they continued to send the overwhelming majority of their GMAT score reports to programs within the United States.

Table 8: Top 10 Countries by School Location*—US Citizens					
TY 2005 All US Citizens			TY 2009 All US Citizens		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	300,117	98.35%	1. United States	369,946	97.94%
2. United Kingdom	1,615	0.53%	2. United Kingdom	2,530	0.67%
3. France	844	0.28%	3. France	1,238	0.33%
4. Canada	475	0.16%	4. Spain	966	0.26%
5. Spain	442	0.14%	5. Canada	514	0.14%
6. Switzerland	178	0.06%	6. Hong Kong	246	0.07%
7. Hong Kong	153	0.05%	7. Switzerland	244	0.06%
8. Peru	136	0.04%	8. China	230	0.06%
9. Italy	115	0.04%	9. Italy	200	0.05%
10. Australia	113	0.04%	10. Israel	196	0.05%
Total Number of Score Reports Sent by US Citizens: 305,149		Avg. # 2.8	Total Number of Score Reports Sent by US Citizens: 377,742		Avg. # 2.9

* Based on number of score reports received.

- There has been a slow but steady decline, however, in the overall proportion of scores sent to US programs in recent years. By TY 2009, this proportion (97.9%) fell below 98 percent for the first time on record.
- Although a high proportion of GMAT score reports was sent by US examinees to programs in the United States in TY 2009, nearly 8,000 scores were sent to programs outside of the United States, due to the large number of total score reports sent.
- Of the examinees sending score reports to non-domestic programs, business schools in Western Europe and Canada were the most successful at attracting US talent. The United Kingdom, France, Spain, and Canada, for example, captured 67 percent of scores sent to programs outside the United States by US citizens in TY 2009.

Australian and Pacific Island Citizens

Due to a substantial increase in GMAT test-taking, the total number of score reports sent by citizens of Australia and the Pacific Islands increased by more than 1,000, or 61 percent, between TY 2005 and TY 2009. This occurred despite a decrease in the average number of score reports sent per examinee from 2.8 to 2.5.

Table 9: Top 10 Countries by School Location*—Australian/Pacific Island Citizens

TY 2005 All Australian/Pacific Island Citizens			TY 2009 All Australian/Pacific Island Citizens		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	990	57.49%	1. United States	1,311	47.31%
2. Australia	243	14.11%	2. Australia	597	21.54%
3. United Kingdom	229	13.30%	3. United Kingdom	375	13.53%
4. France	97	5.63%	4. France	150	5.41%
5. New Zealand	34	1.97%	5. Spain	52	1.88%
6. Hong Kong	33	1.92%	6. Canada	47	1.70%
7. Canada	20	1.16%	7. Hong Kong	36	1.30%
8. Switzerland	20	1.16%	8. Switzerland	35	1.26%
9. India	12	0.70%	8. India	35	1.26%
10. Ireland	8	0.46%	10. Singapore	27	0.97%
Total Number of Score Reports Sent by Australian/Pacific Island Citizens: 1,722		Avg. # 2.8	Total Number of Score Reports Sent by Australian/Pacific Island Citizens: 2,771		Avg. # 2.5

* Based on number of score reports received.

- Over the last five years, citizens from Australia and the Pacific Islands have shifted away from programs in the United States. The proportion of score reports sent to the United States fell 10 percent, from 57 percent in TY 2005 to 47 percent in TY 2009.
- Most of the market shift is explained by an increased interest in programs located in Australia, which raised its market share from 14 percent of all score reports in TY 2005 to 22 percent in TY 2009.
- Citizens of Australia and New Zealand sent 99 percent of all score reports from this region in TY 2009.

**Table 10: Top 5 Score-Sending Citizen Groups
in Australia/Pacific Islands**

Citizen Group	Scores Sent in TY 2009	Percentage of Total
1. Australia	2,314	83.51%
2. New Zealand	424	15.30%
3. Fiji	11	0.40%
4. Marshall Islands	7	0.25%
5. Papua New Guinea	7	0.25%
Region Total	2,771	100%

Central and South Asian Citizens^{2,3}

The number of GMAT score reports sent from the Central and South Asian region increased more than 120 percent between TY 2005 and TY 2009, the greatest percentage increase of any region in this report. India—the largest citizen group in the region—sent 94 percent of all scores from the region in TY 2009 and heavily influenced regional preferences examined below.

Table 11: Top 10 Countries by School Location*—Central and South Asian Citizens					
TY 2005			TY 2009		
All Citizens of Central and South Asia			All Citizens of Central and South Asia		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	47,375	73.83%	1. United States	81,421	56.73%
2. India	4,907	7.65%	2. India	22,170	15.45%
3. United Kingdom	3,544	5.52%	3. United Kingdom	11,900	8.29%
4. Canada	2,767	4.31%	4. Singapore	9,163	6.38%
5. France	1,506	2.35%	5. Canada	4,810	3.35%
6. Singapore	1,372	2.14%	6. France	4,776	3.33%
7. Australia	736	1.15%	7. Australia	2,384	1.66%
8. Philippines	343	0.53%	8. Spain	1,059	0.74%
9. Switzerland	334	0.52%	9. Hong Kong	988	0.69%
10. Pakistan	297	0.46%	10. Switzerland	942	0.66%
Total Number of Score Reports Sent by Central and South Asian Citizens: 64,172		Avg. # 4.1	Total Number of Score Reports Sent by Central and South Asian Citizens: 143,518		Avg. # 4.3

* Based on number of score reports received.

- The most significant shift observed in the Central and South Asian region in recent years has been the persistent trend away from US programs. The proportion of score reports sent to the United States from Central and South Asians fell from 74 percent in TY 2005 to 57 percent in TY 2009. Because of large testing growth, however, the absolute number of score reports sent to the United States from the region was greater in TY 2009 than it was in TY 2005.
- The loss in market share by programs in the United States was due to substantial gains made by programs in India, the United Kingdom, and Singapore.
- A distinguishing feature of the Central and South Asian region is the high average number of score reports sent per examinee. At 4.3 in TY 2009, citizens in the region sent the most score reports per examinee of any region analyzed in this report.

Table 12: Top 5 Score-Sending Citizen Groups in Central and South Asia		
Citizen Group	Scores Sent in TY 2009	Percentage of Total
1. India	134,885	93.98%
2. Pakistan	3,933	2.74%
3. Nepal	2,141	1.49%
4. Bangladesh	1,061	0.74%
5. Kazakhstan	799	0.56%
Region Total	143,518	100%

² The Central and South Asia region was labeled “Central Asia” in versions of this report published prior to 2009.

³ For further information on score-reporting trends in Central and South Asia, refer to the Asian Geographic Trend Reports on gmac.com (available at gmac.com/GeographicTrends).

East and Southeast Asian Citizens^{4,5}

Led by China, the East and Southeast Asian region has been one of the fastest growing groups in the GMAT pipeline over the last five years. The number of score reports sent totaled more than 140,000 in TY 2009, an increase of 63 percent, or nearly 55,000, from TY 2005.

Table 13: Top 10 Countries by School Location*—East and Southeast Asian Citizens

TY 2005 All Citizens of East and Southeast Asia			TY 2009 All Citizens of East and Southeast Asia		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	68,031	79.16%	1. United States	109,359	77.86%
2. Canada	4,325	5.03%	2. United Kingdom	6,345	4.52%
3. United Kingdom	3,652	4.25%	3. Hong Kong	4,882	3.48%
4. Hong Kong	2,639	3.07%	4. Canada	3,987	2.84%
5. France	1,570	1.83%	5. France	3,862	2.75%
6. Singapore	1,512	1.76%	6. Singapore	3,719	2.65%
7. China	1,170	1.36%	7. China	2,913	2.07%
8. Netherlands	482	0.56%	8. Australia	1,389	0.99%
9. Australia	443	0.52%	9. Netherlands	786	0.56%
10. Thailand	420	0.49%	10. Japan	556	0.40%
Total Number of Score Reports Sent by East and Southeast Asian Citizens: 85,938		Avg. # 2.9	Total Number of Score Reports Sent by East and Southeast Asian Citizens : 140,464		Avg. # 3.1

* Based on number of score reports received.

- The United States remains the preferred destination for examinees from East and Southeast Asia. In TY 2009, more than 77 percent of score reports sent from citizens of the region went to business programs located in the United States.
- Canada was the only country to experience a significant decline in the proportion and absolute number of score reports sent by East and Southeast Asian citizens. Programs in Canada received just 3 percent of all East and Southeast Asian examinee score reports in TY 2009, down from 5 percent in TY 2005.
- Five of the top 10 destinations for East and Southeast Asian citizens were business programs located in Asia and the Pacific during TY 2009.
- In TY 2009, Chinese examinees accounted for more than 60 percent of the 140,464 scores sent by East and Southeast Asian citizens.

Table 14: Top 5 Score-Sending Citizen Groups in East and Southeast Asia

Citizen Group	Scores Sent in TY 2009	Percentage of Total
1. China	85,794	61.08%
2. Taiwan	15,769	11.23%
3. South Korea	13,071	9.31%
4. Thailand	6,119	4.36%
5. Japan	5,961	4.24%
Region Total	140,464	100%

⁴ The East and Southeast Asia region was labeled “Asia” in versions of this report published prior to 2009.

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 gmac.com/GeographicTrends).

African Citizens

African examinees sent 31 percent more score reports in TY 2009 than they did in TY 2005 due to a substantial increase in regional testing.

Table 15: Top 10 Countries by School Location*—African Citizens					
TY 2005 All African Citizens			TY 2009 All African Citizens		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	9,539	73.39%	1. United States	11,033	64.71%
2. United Kingdom	969	7.45%	2. United Kingdom	1,687	9.89%
3. Canada	808	6.22%	3. South Africa	1,133	6.64%
4. South Africa	399	3.07%	4. Canada	1,048	6.15%
5. France	314	2.42%	5. France	587	3.44%
6. Kenya	269	2.07%	6. Kenya	383	2.25%
7. Egypt	201	1.55%	7. Egypt	262	1.54%
8. Netherlands	66	0.51%	8. Spain	142	0.83%
9. Switzerland	66	0.51%	9. Switzerland	111	0.65%
10. Australia	49	0.38%	10. Australia	90	0.53%
Total Number of Score Reports Sent by African Citizens: 12,998		Avg. # 2.8	Total Number of Score Reports Sent by African Citizens: 17,051		Avg. # 2.6

* Based on number of score reports received.

- The proportion of score reports that African citizens sent to US programs continued to decline: from 73 percent in TY 2005 to 65 percent in TY 2009. Increased interest in programs elsewhere, including Africa and Western Europe, helped direct this trend.
- Within Africa, programs in South Africa, Kenya, and Egypt were represented among top 10 destinations for African examinees in TY 2009. Of these destinations, South Africa has experienced the largest gain in terms of both market share and absolute score reports received since TY 2005.
- Nigerian citizens represented nearly 30 percent of the score reports sent by this region in TY 2009, but several citizen groups recorded substantial testing levels.

Table 16: Top 5 Score-Sending Citizen Groups in Africa		
Citizen Group	Scores Sent in TY 2009	Percentage of Total
1. Nigeria	4,860	28.50%
2. Kenya	2,080	12.20%
3. South Africa	1,801	10.56%
4. Ghana	1,596	9.36%
5. Egypt	1,464	8.59%
Region Total	17,051	100%

European Citizens, Eastern⁶

The number of GMAT score reports sent by citizens of Eastern Europe increased 24 percent between TY 2005 and TY 2009, despite a substantial decrease in the average number of score reports sent per examinee from 2.7 to 2.4.

Table 17: Top 10 Countries by School Location*—Eastern European Citizens					
TY 2005			TY 2009		
All Eastern European Citizens			All Eastern European Citizens		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	7,879	71.37%	1. United States	7,410	55.34%
2. United Kingdom	800	7.43%	2. United Kingdom	1,699	12.69%
3. France	464	4.31%	3. France	936	6.99%
4. Canada	363	3.37%	4. Netherlands	634	4.74%
5. Spain	169	1.57%	5. Spain	518	3.87%
6. Switzerland	159	1.48%	6. Canada	338	2.52%
7. Germany	147	1.36%	7. Switzerland	302	2.26%
8. Netherlands	146	1.36%	8. Italy	301	2.25%
9. Hungary	98	0.91%	9. Sweden	185	1.38%
10. Italy	96	0.89%	10. Armenia	146	1.09%
Total Number of Score Reports Sent by Eastern European Citizens: 10,773		Avg. # 2.7	Total Number of Score Reports Sent by Eastern European Citizens: 13,389		Avg. # 2.4

* Based on number of score reports received.

- The most significant change in score-sending habits among Eastern European examinees since TY 2005 has been the sizable shift away from programs located in the United States. The absolute number of score reports sent to the United States from Eastern Europeans decreased 6 percent between TY 2005 and TY 2009, reducing the overall proportion of scores sent to US business schools from 71 percent to 55 percent over the five-year span.
- Several countries in Western Europe have captured the considerable market share lost by the United States, including the United Kingdom, France, and the Netherlands.
- Armenia appeared on the top 10 list for the first time in TY 2009 and was the only Eastern European country represented.
- Russian citizens accounted for roughly a third of all scores sent from Eastern Europe in TY 2009.

Table 18: Top 5 Score-Sending Citizen Groups in Eastern Europe		
Citizen Group	Scores Sent in TY 2009	Percentage of Total
1. Russia	4,322	32.28%
2. Bulgaria	1,568	11.71%
3. Romania	1,288	9.62%
4. Ukraine	1,171	8.75%
5. Poland	1,012	7.56%
Region Total	13,389	100%

⁶ For further information on score-reporting trends in Eastern Europe, refer to the European Geographic Trend Reports on gmac.com (available at gmac.com/GeographicTrends).

European Citizens, Western⁷

Western European examinees have demonstrated an increased interest in regional programs since TY 2005 and, in TY 2009, once again sent a majority of their GMAT score reports to programs located in Western Europe.

Table 19: Top 10 Countries by School Location*—Western European Citizens					
TY 2005			TY 2009		
All Western European Citizens			All Western European Citizens		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	11,379	40.41%	1. United States	13,248	35.32%
2. United Kingdom	4,090	14.52%	2. United Kingdom	5,509	14.69%
3. France	3,380	12.00%	3. France	5,418	14.45%
4. Greece	2,266	8.05%	4. Spain	2,269	6.05%
5. Spain	1,223	4.34%	5. Netherlands	2,193	5.85%
6. Switzerland	1,047	3.72%	6. Switzerland	1,426	3.80%
7. Netherlands	876	3.11%	7. Germany	1,394	3.72%
8. Portugal	568	2.02%	8. Greece	1,349	3.60%
9. Germany	553	1.96%	9. Italy	966	2.58%
10. Italy	549	1.95%	10. Sweden	541	1.44%
Total Number of Score Reports Sent by Western European Citizens: 28,162		Avg. # 2.1	Total Number of Score Reports Sent by Western European Citizens: 37,504		Avg. # 2.1

* Based on number of score reports received.

- Greece and Portugal were the only score destinations from the top 10 in TY 2005 that received fewer score reports from Western European examinees in TY 2009.
- Programs in the United States received just 35 percent of score reports sent by Western European examinees in TY 2009, down from 40 percent in TY 2005 and 60 percent in TY 2000.
- Business schools in the several Western European countries – including the United Kingdom, France, Spain, and the Netherlands – received significantly more GMAT score reports in TY 2009 when compared with TY 2005.
- For the second year in a row, the United States was the only non-Western European destination on the top 10 list for Western European examinees.
- Compared with all of the regions studied in this report, Western European examinees send the lowest number of score reports per examinee. In TY 2009, the average Western European examinee sent just 2.1 score reports, well below the global average of 3.0.

Table 20: Top 5 Score-Sending Citizen Groups in Western Europe		
Citizen Group	Scores Sent in TY 2009	Percentage of Total
1. Germany	7,160	19.09%
2. France	6,823	18.19%
3. United Kingdom	4,575	12.20%
4. Italy	3,938	10.50%
5. Spain	2,969	7.92%
Region Total	37,504	100%

⁷ For further information on score-reporting trends in Western Europe, refer to the European Geographic Trend Reports on gmac.com (available at gmac.com/GeographicTrends).

Middle Eastern Citizens

Strong growth in GMAT testing among citizens of Middle Eastern countries between TY 2005 and TY 2009 resulted in a 31 percent increase in the number of score reports sent over the last five years. Many of these additional score reports were sent to programs in the United States, as the Middle East was the only citizenship region in this report that sent a greater proportion of score reports to US schools in TY 2009 when compared with TY 2005.

Table 21: Top 10 Countries by School Location*—Middle Eastern Citizens

TY 2005 All Citizens of the Middle East			TY 2009 All Citizens of the Middle East		
Country/Region	Scores Sent	Percentage	Country/Region	Scores Sent	Percentage
1. United States	7,680	41.36%	1. United States	10,822	44.63%
2. Israel	6,713	36.15%	2. Israel	6,497	26.80%
3. Canada	946	5.09%	3. Canada	1,630	6.72%
4. Turkey	774	4.17%	4. United Kingdom	1,303	5.37%
5. United Kingdom	680	3.66%	5. Turkey	1,068	4.40%
6. France	537	2.89%	6. France	789	3.25%
7. Lebanon	532	2.87%	7. Lebanon	711	2.93%
8. Spain	94	0.51%	8. Spain	336	1.39%
9. United Arab Emirates	89	0.48%	9. Netherlands	161	0.66%
10. Netherlands	76	0.41%	10. Italy	153	0.63%
Total Number of Score Reports Sent by Middle Eastern Citizens: 18,568		Avg. # 2.8	Total Number of Score Reports Sent by Middle Eastern Citizens: 24,247		Avg. # 2.6

* Based on number of score reports received.

- Middle Eastern examinees demonstrate significant interest in studying in many parts of the world, including regional opportunities in Israel, Turkey, and Lebanon.
- Programs in Israel have experienced a significant decline in the proportion of score reports received from Middle Eastern examinees. In TY 2005, 36 percent of regional scores went to business programs in Israel. By TY 2009, this proportion fell to 27 percent as 200 fewer score reports were received.
- Increased interest from Middle Eastern citizens in US and Western European programs was partly responsible for the decline in Israeli market share.
- Israeli and Turkish examinees accounted for nearly two-thirds of all GMAT scores sent from the Middle East region in TY 2009.

Table 22: Top 5 Score-Sending Citizen Groups in Middle East

Citizen Group	Scores Sent in TY 2009	Percentage of Total
1. Israel	9,218	38.02%
2. Turkey	6,190	25.53%
3. Lebanon	2,307	9.51%
4. Saudi Arabia	2,225	9.18%
5. Iran	2,185	9.01%
Region Total	24,247	100%

Questions of Interest

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 of leaving the workforce and decide to return to school until conditions improve. Historic GMAT volume data provide evidence to support this theory. Each of the previous US recessions since 1980—those 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 they clearly alter the incentive structure facing prospective business students.

What have been the most significant shifts in the GMAT pipeline over the last five years?

In addition to nearly universal increases in GMAT testing since TY2005, several trends relating to examinee characteristics have begun to transform the student pipeline. The most significant shift has been a trend toward a younger examinee base. While the number of GMAT exams taken globally has increased 32 percent since TY 2005, the number of exams taken by those younger than 25 has increased 72 percent over this period. This younger group represented 40 percent of the entire GMAT pipeline in TY 2009, up from 31 percent in TY 2005. Another major trend that has been observed is the increase in female GMAT participation. Although globally, the percentage of women in the GMAT pipeline has remained for several years near 40 percent, over the last five years the majority of individual citizen groups around the world have experienced increases in the proportion of exams taken by female examinees.

Where is testing growth the most pronounced?

Citizens of Asian countries—most notably India and China—have been largely responsible for the global 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 2005 and TY 2009. Outside of Asia, there has also been significant testing growth in many parts of Europe, the Middle East, and Africa.

There is a lower proportion of score reports being sent to US schools by Western European citizens. Is this due to the Bologna Accord?

From TY 2000 to TY 2009, the percentage of score reports sent to US schools by Western European citizens decreased from 60 percent to 35 percent. While some of this decrease may be due to local opportunities made available through to the Bologna Accord, other 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), is unlikely to be known for several years.

I would like more information. Where do I go?

If you have additional questions about this and other geographic reports in our series, please email research@gmac.com. To obtain information about all available GMAC reports, please visit gmac.com/ResearchandTrends.

Authorship

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

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Acknowledgements

Lawrence Rudner, Vice President, Research and Development, GMAC, manuscript review; Veronica Sinz, Research Publications Manager, GMAC, editorial review; Paula Bruggeman, GMAC, editorial services.

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 AND PACIFIC ISLANDS

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

CANADA

Canada

CENTRAL AND 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 versions of this report published prior to 2009.

EAST AND 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 versions of this report published prior to 2009.

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 Grenadines
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	Jordan	Syria
Gaza Strip	Kuwait	Turkey
Iran	Lebanon	United Arab Emirates
Iraq	Oman	West Bank
Israel	Saudi Arabia	Yemen

* **Note:** Turkey was included under Western Europe in versions of this report published prior to 2007. Turkey was reclassified under the Middle East category due to a change in test vendor classifications.

UNITED STATES

United States of America

WESTERN EUROPE*

Andorra	Greece	Netherlands
Austria	Iceland	Norway
Belgium	Ireland	Portugal
Cyprus	Italy	Spain
Denmark	Liechtenstein	Sweden
Finland	Luxembourg	Switzerland
France	Malta	United Kingdom
Germany	Monaco	

***Note:** Andorra was classified as part of Eastern Europe in versions of this report published prior to 2009.

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