

Market Intelligence

# Online & Hybrid Learning Data Report

August 2024

Graduate  
Management  
Admission  
Council™



# Executive Summary

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Globally, candidate preference for hybrid learning continues to increase at the expense of in-person learning, while interest in predominantly online learning remains flat. This increase is evident across regions and demographic groups, with overall preference highest among candidates who have traditionally demonstrated the most interest: women, older (Gen X and millennial) candidates, first-generation and U.S. underrepresented candidates, and prospective students in North America and Africa.

This growing candidate interest appears to have translated to actual applications in the past year, with increasing shares of hybrid and online programs reporting application growth in 2023. However, predominantly online business master's programs were the exception, with a majority of these programs experiencing year-over-year application declines.

Meanwhile, employers continue to have doubts about how the quality of online programs stack up to in-person programs with regard to their abilities to impart communication, leadership, and technical skills to their students. This concern is most pronounced in Asia and the consulting industry, while U.S. and technology sector employers appear the most open to the skills-building capabilities of online programs.

# Sources

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## **Prospective Students Survey (March 2024)**

*Fielded January–December 2023*

- 4,105 respondents
- 132 countries



## **Application Trends Survey (October 2023)**

*Fielded June–August 2023*

- 893 programs
- 32 countries

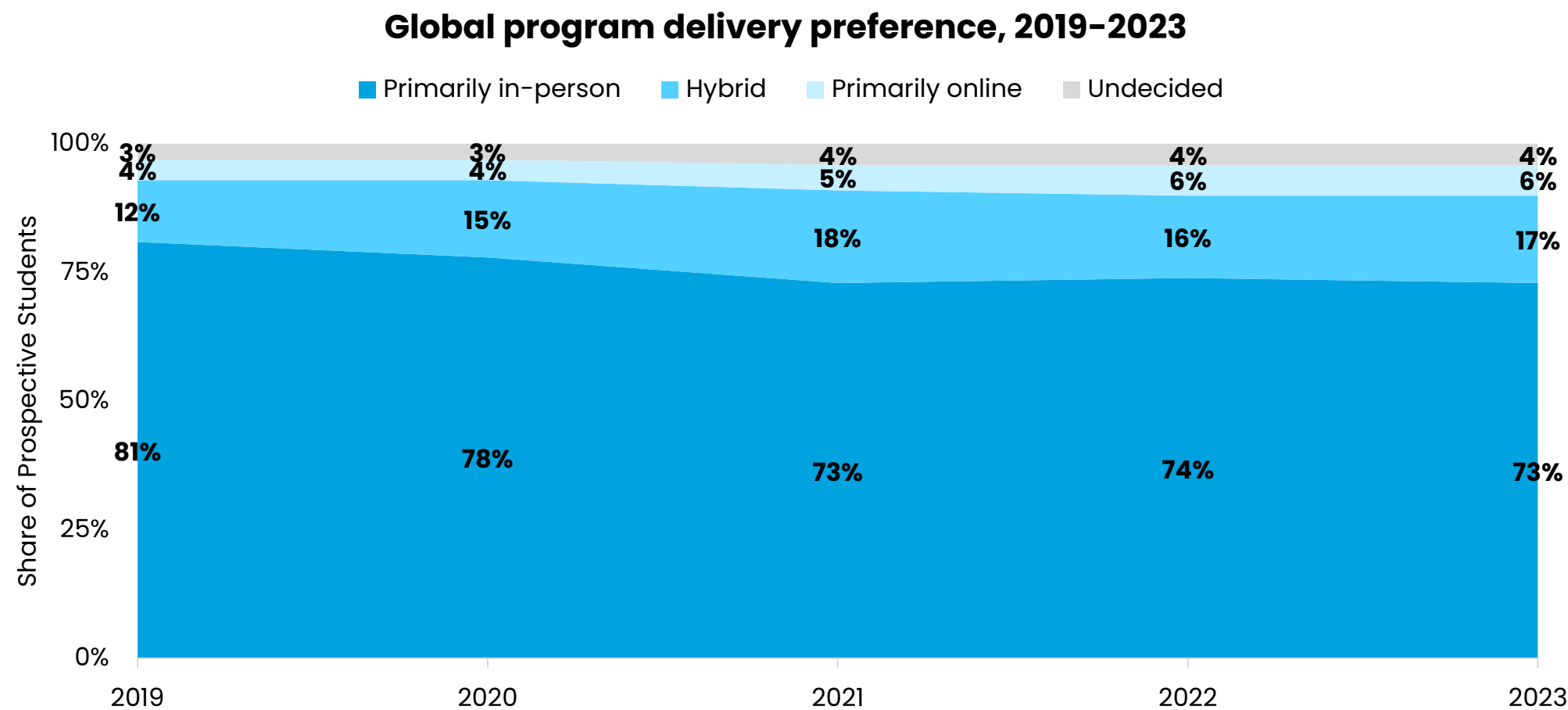


## **Corporate Recruiters Survey (June 2024)**

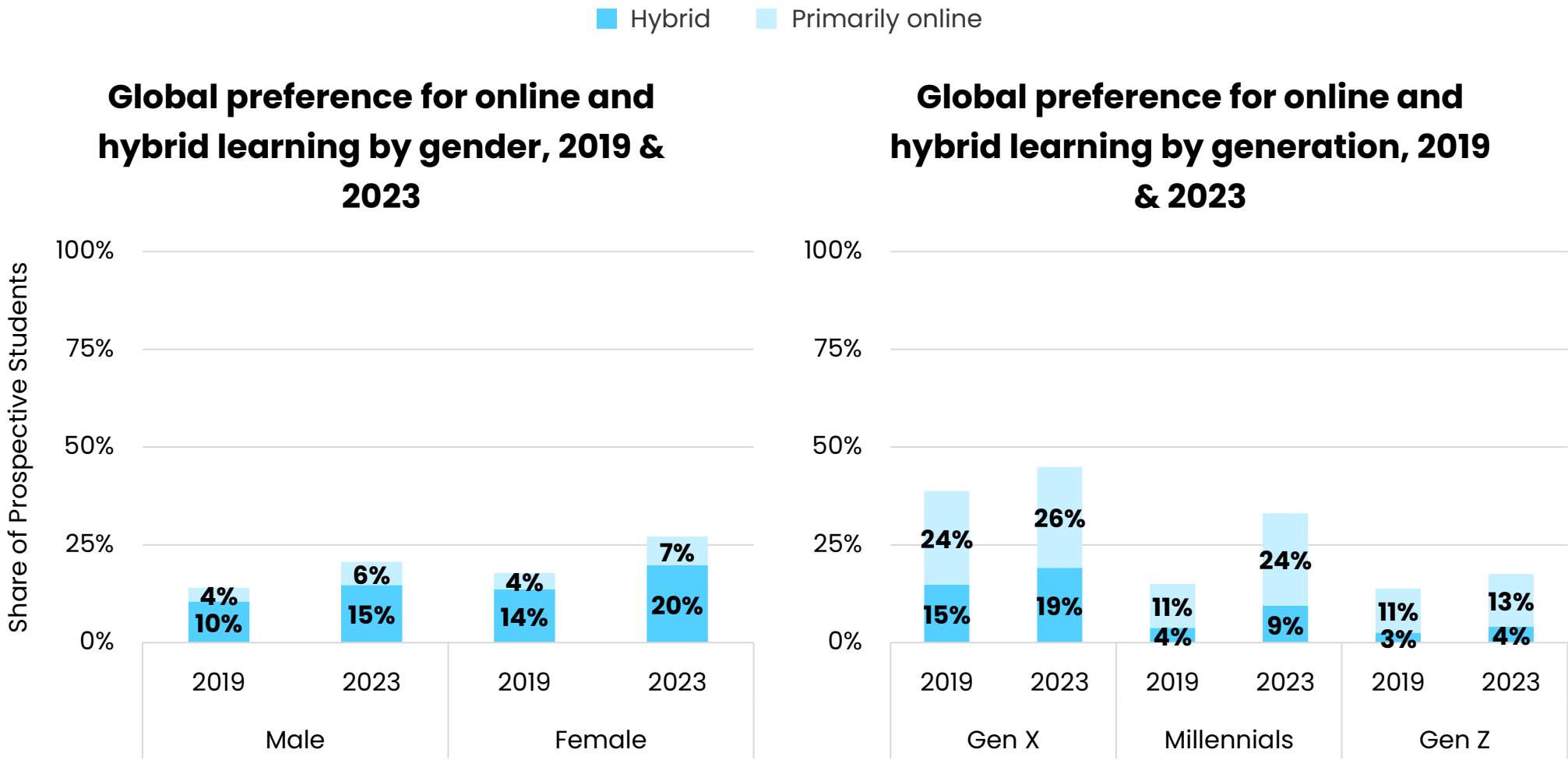
*Fielded January–March 2024*

- 931 respondents
- 38 countries

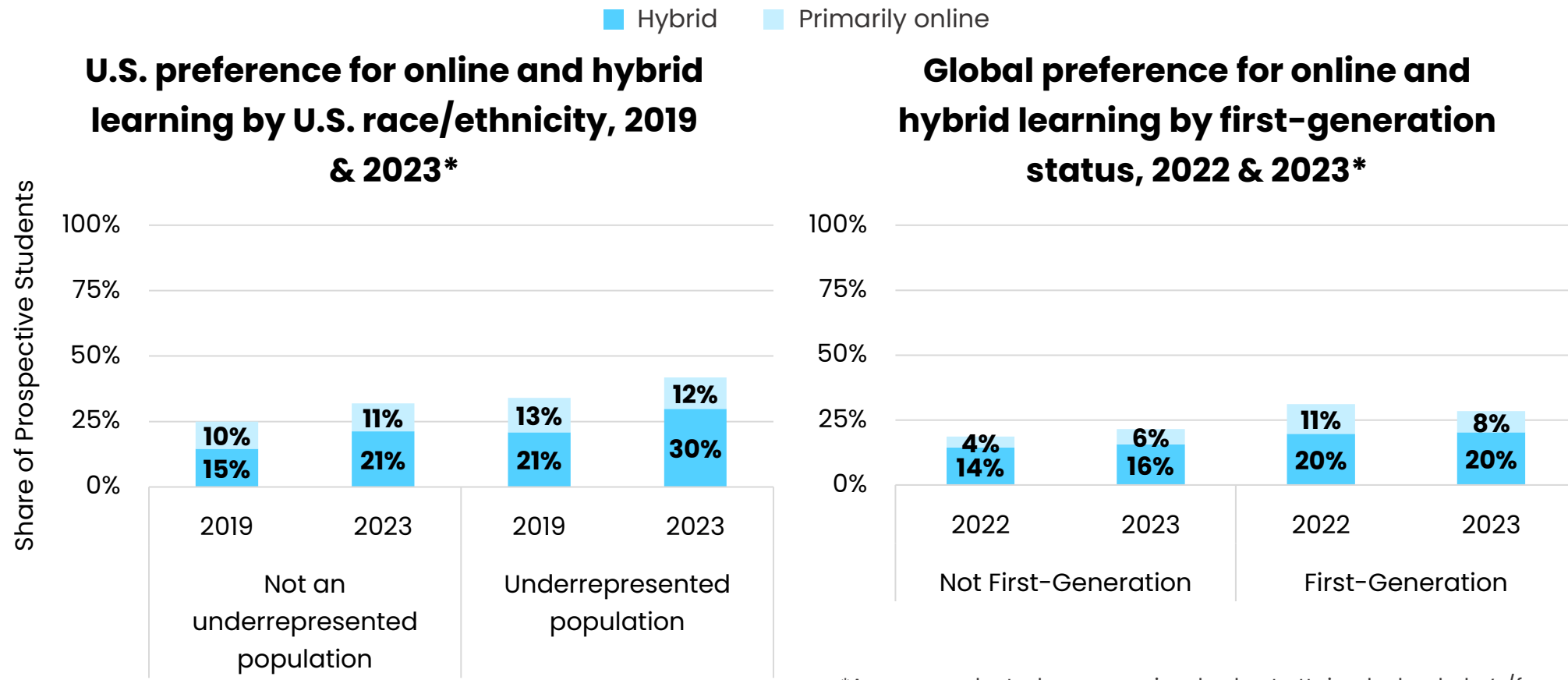
# Since 2019, candidate interest in hybrid learning has increased as preference for in-person delivery decreased; online interest remained largely flat



# This interest in online and hybrid learning has increased since 2019 regardless of gender or generation—and women and older candidates still show outsized preference



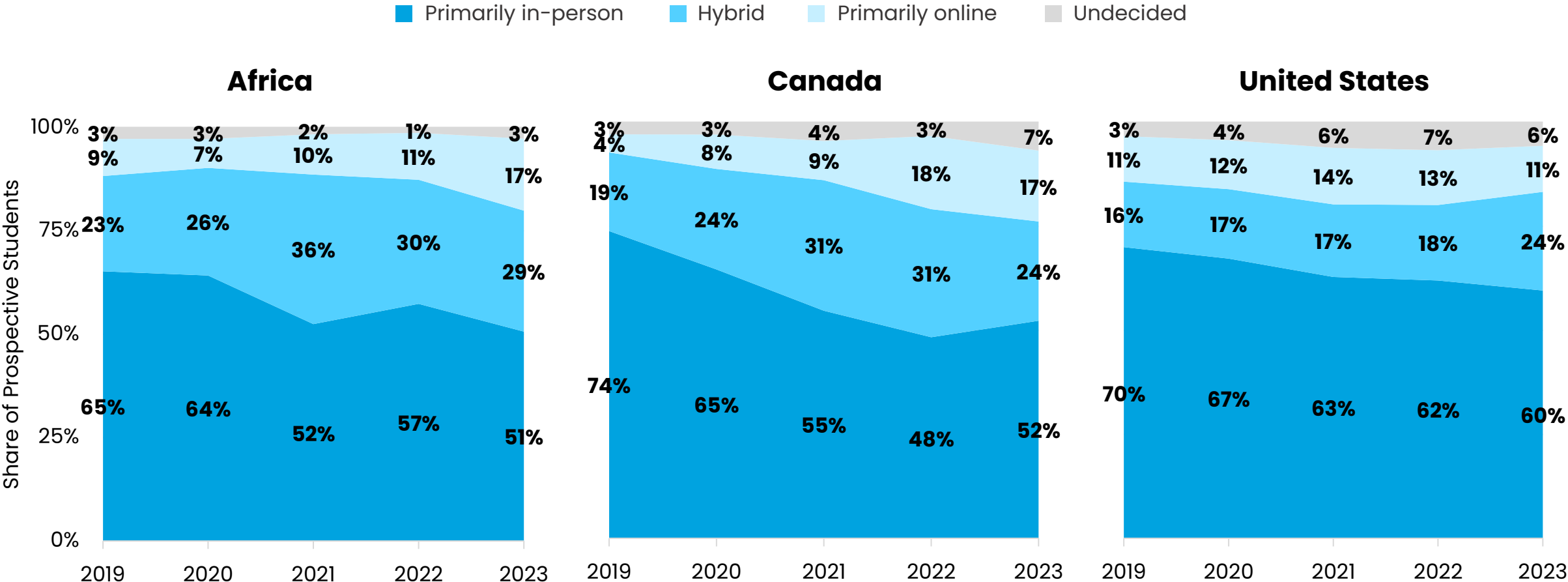
# Looking at other demographic qualities, U.S. underrepresented candidates and global first-generation candidates also continue to demonstrate a stronger preference for online and hybrid learning



\*Candidates who self-identified as Black or African American, Hispanic, or Native American were classified as “underrepresented U.S. candidates.”

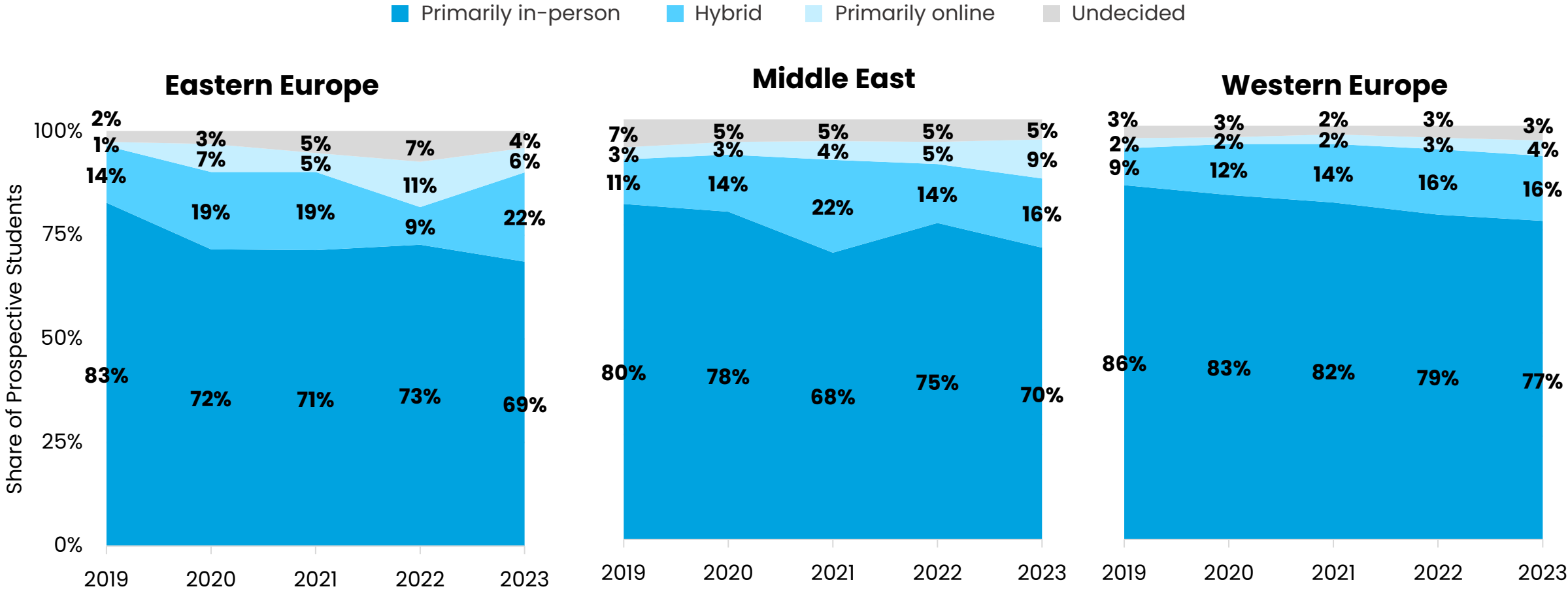
\*Any respondent whose caregiver had not attained a bachelor’s/four-year degree or higher level of education was considered to be “first-generation.” This demographic category was first added in 2022.

# Regionally, the highest rates of candidate preference for online and hybrid learning are found in Africa and North America...



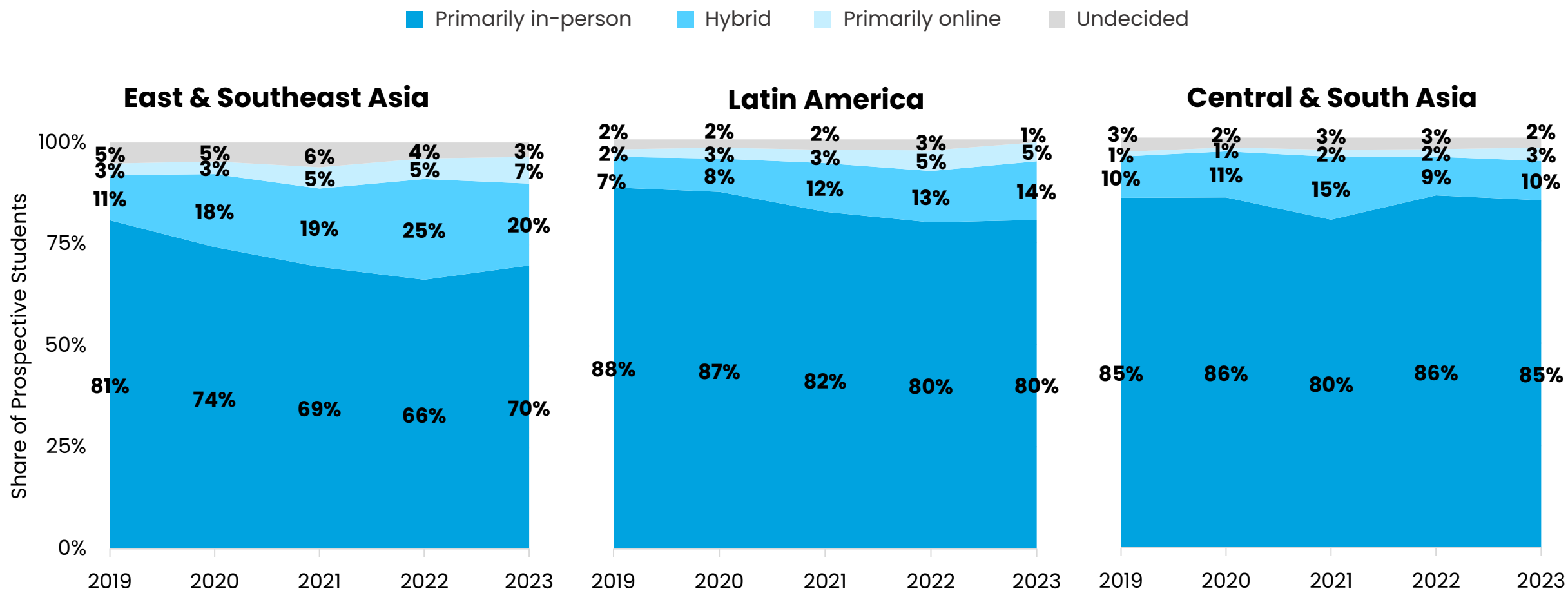
Source: GMAC Prospective Students Survey

# ...preference for online and hybrid learning has increased incrementally in Europe and the Middle East...



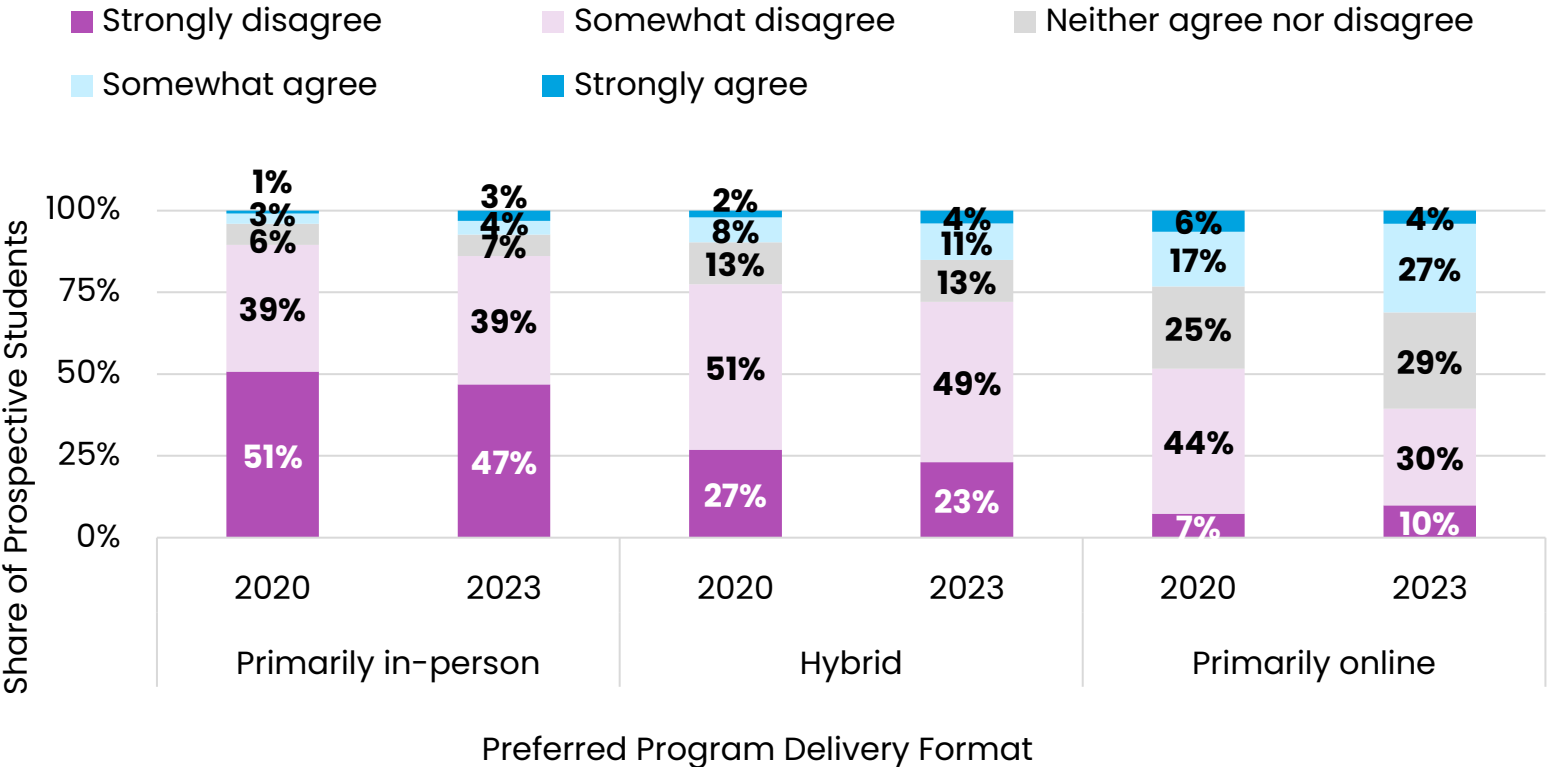


# ...and preference for online and hybrid learning has increased incrementally in East & Southeast Asia—with the least penetration in Latin America and Central & South Asia



# What might be behind the growing interest? Agreement that online programs offer comparable networking opportunities has increased somewhat among their target audience

Agreement with the statement: "**Networking opportunities** gained through an on-campus graduate business degree are same as those gained through an online degree."



17%

of **African** candidates somewhat agreed in 2023 compared to a 2023 global average of **7%**

9%

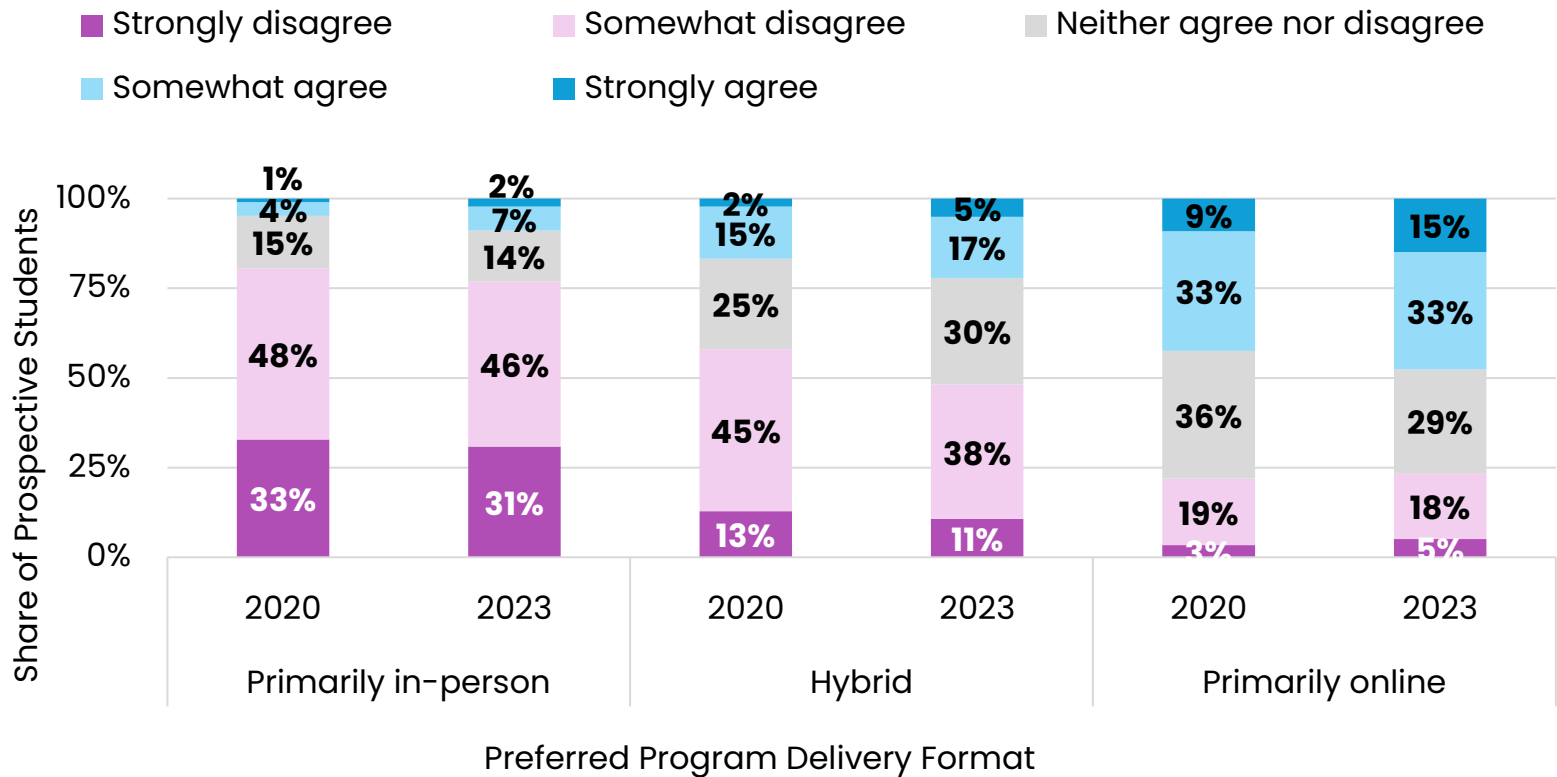
of **Middle Eastern** candidates strongly agreed in 2023 compared to **1%** in 2020

45%

of **Western European** candidates strongly disagreed in 2023 compared to **53%** in 2020

# In addition, candidates who prefer online and hybrid learning are now somewhat more optimistic about these programs' career opportunities

Agreement with the statement: "**Career opportunities** gained through an on-campus graduate business degree are same as gained through an online degree."



26%

of **African** candidates somewhat agreed in 2023 compared to a 2023 global average of **11%**

16%

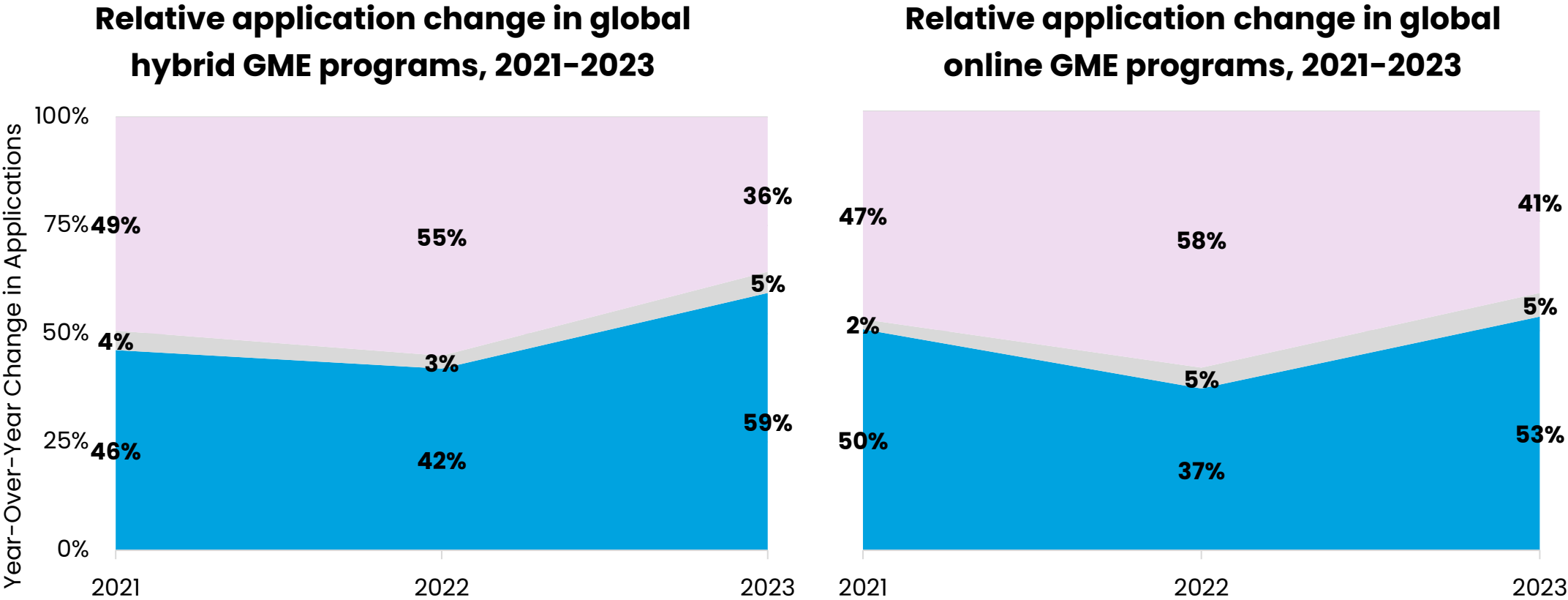
of **East & Southeast Asian** candidates somewhat agreed in 2023 compared to **10%** in 2020

16%

of **U.S.** candidates somewhat agreed in 2023 compared to **11%** in 2020

# This growing interest has translated to actual application trends—more than half of hybrid and online GME programs reported application growth in 2023

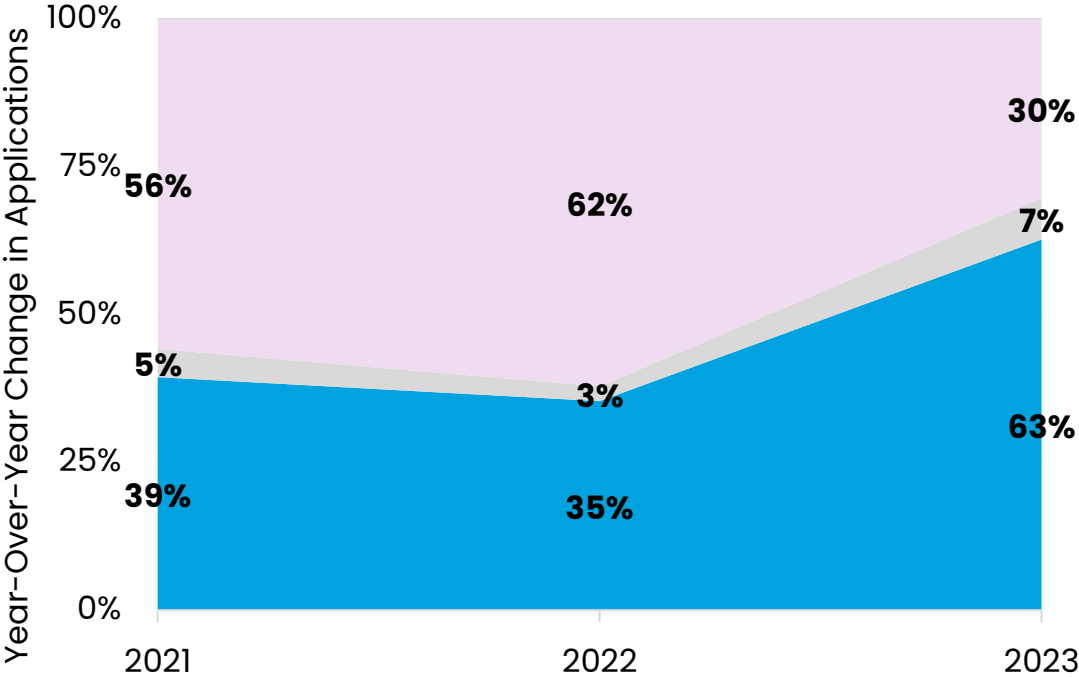
■ Increase   ■ Stable   ■ Decrease



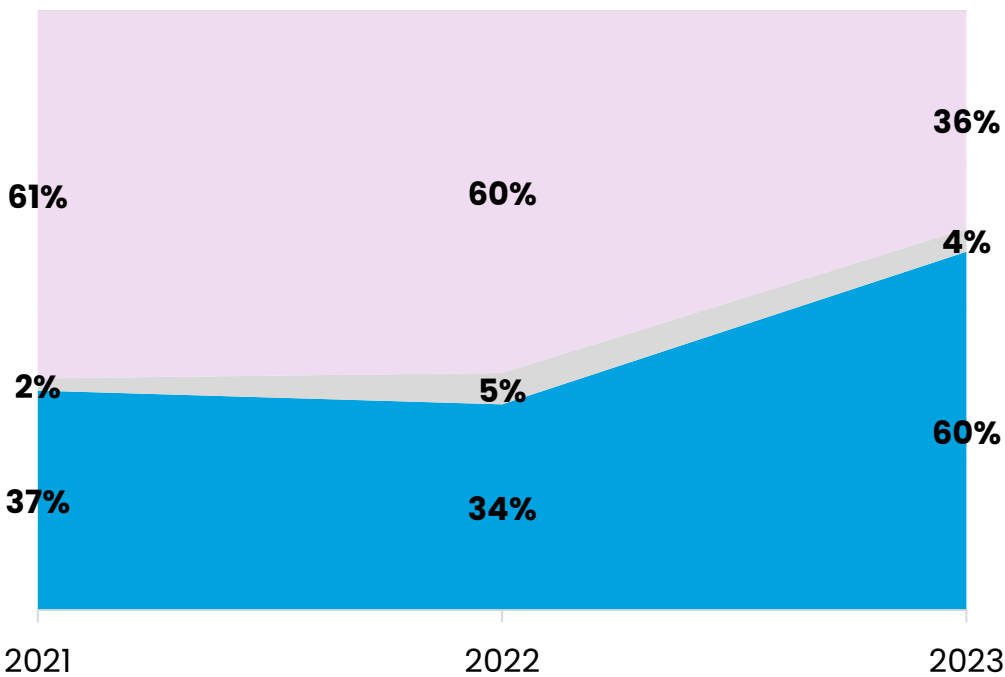
# Zooming in on MBAs, a much larger share of these online and hybrid programs reported application growth compared to 2021 and 2022

■ Increase   ■ Stable   ■ Decrease

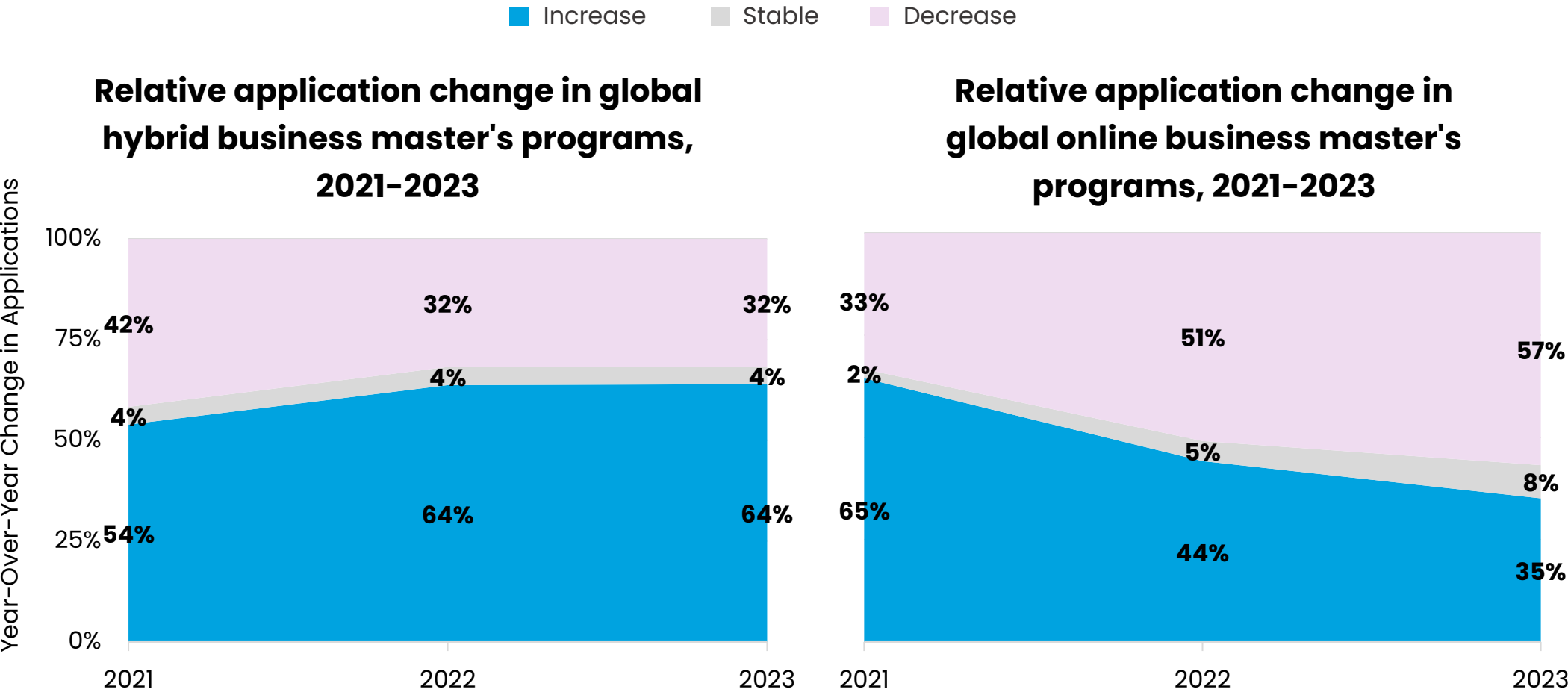
Relative application change in global hybrid MBA programs, 2021-2023



Relative application change in global online MBA programs, 2021-2023



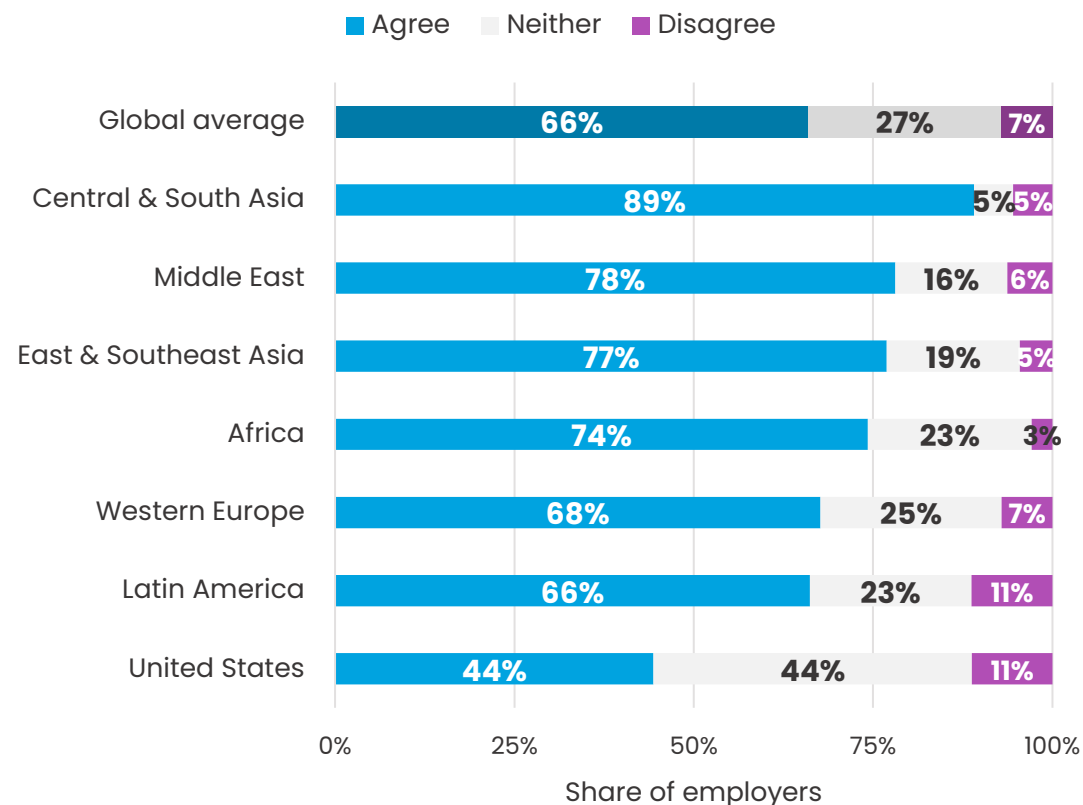
# Meanwhile, applications to hybrid business master's programs followed the overall trend, but most online master's programs have seen recent application declines



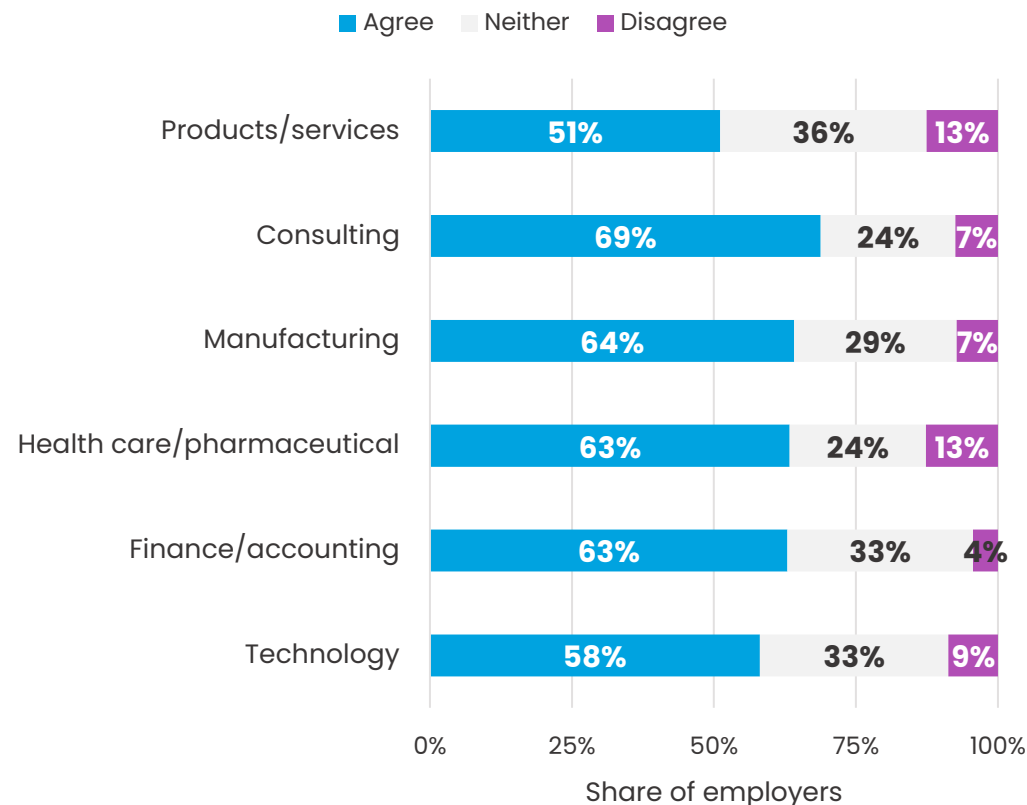
# As these programs gain traction with candidates, what do their future employers think? Unfortunately, two-thirds of employers believe in-person programs impart stronger technical skills than online programs

"Employees with a graduate business degree from a fully in-person program are more likely to have **strong technical skills** than those with a degree from an online or predominantly online program."

Agreement with the statement by **region**



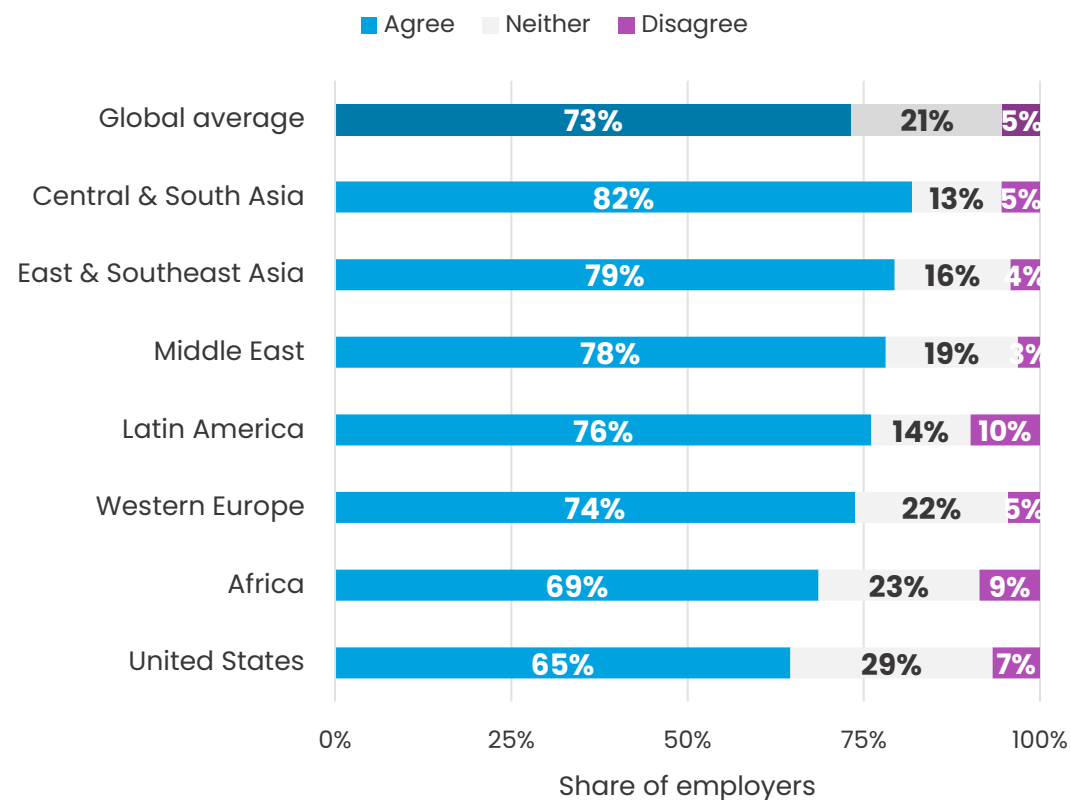
Agreement with the statement by **industry**



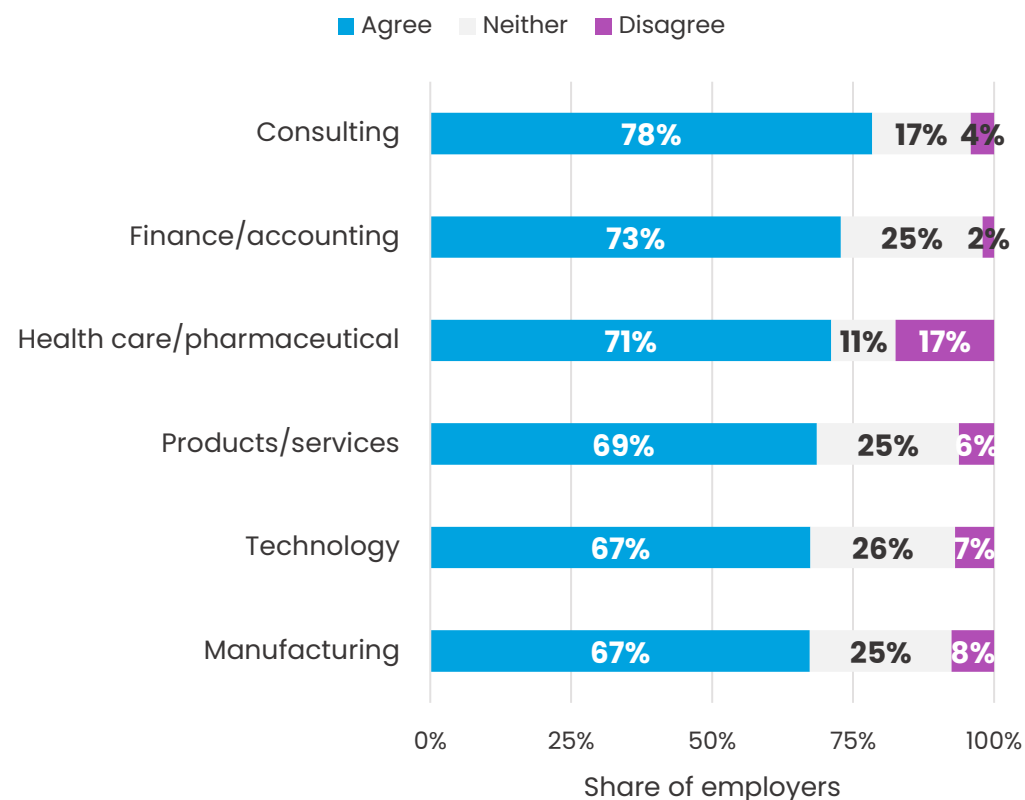
# Among different employers, U.S., tech, and manufacturing employers are most open to the idea that in-person programs do not necessarily impart stronger leadership and communication skills

"Employees with a graduate business degree from a fully in-person program are more likely to have **strong leadership and communication skills** than those with a degree from an online or predominantly online program."

Agreement with the statement by **region**



Agreement with the statement by **industry**





# Conclusion & Opportunities

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Across candidate, program, and employer perspectives, appreciation for online and hybrid learning is growing; however, there are key areas where purveyors of these programs can improve.

Among candidates, it is true that interest—particularly in hybrid programs—has increased across geographies in the past five years. The only region where we have not seen growth is in Central & South Asia—which also happens to have the largest pool of GME candidates in the world.

Among programs, it is notable that applications to online business master's degrees have not grown to the same extent as similarly flexible programs. As business schools consider adding more specialized degree programs on increasingly flexible schedules, it is important to understand the market for different combinations of subject matter and program delivery methods.

For employers, it appears that their perceptions of online programs have not kept pace with the dramatic changes seen in this space in the past several years. As such, business schools have the opportunity to educate recruiters about the unique value of online programs.



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School and industry leaders rely on the Council as the premier provider of reliable data about the graduate management education industry.

## Contact Information

For questions or comments regarding the data or analysis presented in this report, please contact the GMAC Research & Data Science Team at [research@gmac.com](mailto:research@gmac.com).

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