Understanding the Implications of the Digital Generation on Business Education

Phase 3: Attitudes and Usage Study 2017

Quantitative Report

Commissioned by:

AACSB
Business Education. Connected.

UNICON
Consortium for University Based Executive Education

EMBAC
Global Voice of the Executive MBA Industry

Prepared by:

percept research
Actionable Market Insight Through Intelligent Research
Proprietary and Confidential
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Introduction

Objectives

Three associations that serve the business management education industry, AACSB International, the Executive MBA Council (EMBAC), and the International Consortium for Executive Education (UNICON), seek insights into the evolving expectations and experiences of the up-and-coming generations of professionals spanning “Generation Z” and “Millennials” (so-called “digital generations”). These three associations will be collectively referred to as “Commissioning Organizations” throughout this report as the sponsor of this study.

In addition to understanding the evolving demographics as they relate to business education, the Commissioning Organizations are specifically interested in opportunities that the digital generations present for business schools in both degree-based education and non-degree executive education spaces. The Commissioning Organizations seek to learn how business schools can align their education models and adopt effective strategies to meet the needs of the digital generations throughout their careers. This study was designed to explore the broad range of management learning and development alternatives that will be available to these respondents in the future, respondents’ motivations for pursuing certain management education options, and their attitudes toward available options.

This Quantitative Report summarizes Phase 3 of a multi-phase study sponsored by the Commissioning Organizations.

Methodology

- The questionnaire was developed by the Commissioning Organizations and Percept Research.
- The questionnaire was administered in five native languages (Chinese-Traditional, English, French, Portuguese, Spanish) via a web survey hosted by Percept Research and delivered through a select panel provider.
- Percept Research tabulated the data and developed the quantitative report.
- Sample quotas were proposed to provide representation among countries that have the largest populations of potential advanced management education students. The per-country quota was highest for the United States owing to the country’s market size and population diversity.

<table>
<thead>
<tr>
<th>Current Residence</th>
<th>N</th>
<th>% of Total</th>
<th>Quota</th>
<th>% of Quota</th>
</tr>
</thead>
<tbody>
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<td>Australia</td>
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<td>6.7%</td>
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<tr>
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<td>India</td>
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<td>Singapore</td>
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<td>South Africa</td>
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<td>UK</td>
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<td>6.6%</td>
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<tr>
<td>United States</td>
<td>792</td>
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<td><strong>Total</strong></td>
<td>1,665</td>
<td>100.0%</td>
<td>1,605</td>
<td>103.7%</td>
</tr>
</tbody>
</table>

Fielding Overview

- Fielding Started: July 28, 2017
- Fielding Completed: August 20, 2017
How to Read this Report

Segmentation
- Male vs. Female
- 21-30 vs. 31-40 years old
- Country of Residence: Australia, Brazil, China, France, Germany, India, Singapore, South Africa, Spain, United Kingdom, United States. "Outside the United States" refers to individuals that reside in Australia, Brazil, China, France, Germany, India, Singapore, South Africa, Spain, and the United Kingdom.
- Employment Status (i.e., full-time, part-time, not employed).
- Education level (answer options categorized into three groups: No college through two-year Associate’s degree; Bachelor’s degree; and graduate coursework through graduate degree).
- Likelihood to pursue advanced management education in the next ten years (categorized into three groups, including respondents Extremely or Very Likely (Top 2 Box); those Somewhat Likely; and those Not Very and Not at All Likely (Bottom 2 Box).

Reading Chart Values
- Charts in this report display values to one decimal place (e.g., 4.6). For reported percentages, aggregated values may not always sum to 100.0% due to rounding. For “checkbox” questions in which respondents “Select all that apply,” total reported percentages may exceed 100.0% since more than one answer choice may be selected by a single respondent.

Statistical Precision
- Significance testing (comparisons of column means and column proportions) were conducted across the segmentation above at a 95% confidence level. Significant differences are highlighted in the findings commentary.
- A 0.1 difference in means may be statistically significant given the large sample size and the amount of variance around the mean.
- The commentary within this report presents the word “significant” to identify statistical significance.

Data Cleaning
- Straight-line responses removed (i.e., respondents who entered the same value across all questions or attributes) from data set and Do Not Know/Not Applicable removed where appropriate.
- Data cleaning also included removal of responses that indicated the respondent completed the survey in half the median completion time or otherwise contributed nonsensical responses to open-ended questions.

Verbatim Responses
- Responses to open-ended and ‘other specify’ questions were grouped into key mentions and listed throughout this report. To view all responses in their entirety to those questions, please refer to the Verbatim Document.

Terminology
- The symbol ‘N’ refers to the number of respondents that provided a valid response to that particular question.
- For many of the 5-point scale questions within the study, frequency ratings are presented as ‘Top 2 Box’ or ‘Bottom 2 Box’ - this provides an intuitive approach to understand the number of respondents with a strong sentiment. A Top 2 Box is the net score of the highest two categories of a rating scale. For example, if the scale is: Extremely Likely, Very Likely, Somewhat Likely, Not Very Likely, and Not at All Likely, then the combined category of Extremely Likely and Very Likely is referred to as the Top 2 Box score (whereas Bottom 2 Box is the combined ratings of Not Very Likely, and Not at All Likely). Note: The Top refers to the positive/highest scale response options, not the position of the options on the questionnaire or in a table.
Executive Summary
Executive Summary

Key Findings

Career objectives can vary subtly but notably among various demographic segments.

- When considering motivations for pursuing advanced management education, female respondents issued higher ratings for *Provide increased career stability and job security* than male counterparts. Male respondents provided higher ratings for *Make it easier to start my own business*.
- Female respondents look specifically to the MBA or MA/MS in Management to *Improve my standard of living* and *Provide increased career stability and job security*; however, female respondents look to Management courses and Non-Degree Executive Education to *Gain additional respect and credibility in my current job*.
- Respondents 21 to 30 years old consider *Make it easier to start my own business* and *Obtain international exposure and access* stronger motivations for their pursuit of advanced management education compared to their older counterparts. Conversely, those between 31 and 40 years old give more credence to advanced management education to *Make it easier to change fields or organizations*.

Non-traditional education options, like certificates and digital badges, are gaining credibility and interest among respondents.

- Only one in ten respondents are *Not Very Likely* or *Not at All Likely* to pursue certificates or digital badges as an educational option.
- Certificates and digital certificates provide more attractive options for individuals employed full-time and those holding a graduate degree. In an open-ended question, respondents frequently mentioned the convenience it would provide in their attempt to juggle current employment.
- Compared to respondents working toward or holding a graduate degree, those whose highest level of education is a Bachelor's degree are more likely to see value in certificates and digital badges.
- Individuals not considering pursuing an MBA, Specialized Master’s, or Business and Management courses not part of a formal program in the next ten years are more likely to find certificates and digital badges as a complement to non-degree coursework compared to those *Extremely* or *Very Likely* to pursue these options.
- Almost half of respondents overall believe certificates and digital badges are valuable as a complement to a non-degree coursework or program; over a quarter believe it can substitute for a formal degree, and another 17.4% see these as equally valuable as a substitute or complement to a formal or non-degree program.
- Over half of female respondents (53%) recognized value in certificates and digital badges compared to 44% of males.
Executive Summary

Key Findings

Although traditional Master’s programs continue to carry weight as markers of credibility, prospective students express interest in flexible options they can use to customize their own course plans.

- The MBA or MA/MS in Management is considered the Most Appropriate choice across all motivations for pursuing advanced management education addressed in this study; however, substantial interest lies in other forms and formats.
- Respondents overall express strong interest in credit for life/work experience. Individuals most interested in pursuing credit for life/work experiences report being Extremely Likely or Very Likely to pursue an advanced management program in the next 10 years and are currently employed full-time.
- Those who are Extremely or Very Likely to pursue Non-degree Executive Education are respondents who are currently employed full-time, who possess a graduate degree or completed some graduate coursework, and who reside in the United States.
- Female respondents placed more significance than males to On-the-job training.
- In calculations of respondents’ perceived value of the four education formats as Most Appropriate for motivations addressed in this study, a cumulative 41.5% of respondents selected either Non-Degree Executive Education or Management Courses. This indicates that there is a strong demand for informal and non-graduate degree education options.

Each country and culture presents unique education experiences and preferences that suggest program design and delivery be developed considering each country’s demographics and distinctions.

- The top three overall motivations (Improve my (and/or my family's) standard of living; Provide increased career stability and job security; and Improve my leadership/management skills) received significantly higher ratings from respondents from the United States compared to residents outside the United States. Make it easier to advance in my field or organization, the sixth highest rated motivation, also received higher ratings in the United States. Obtain international exposure and access was the one motivation that received significantly higher ratings from respondents outside the United States.
- Respondents in the United States are significantly more likely to have Completed at Least One Online or Blended Course compared to those outside the United States.
- Residents of the United States are more likely to pursue Non-degree Executive Education than those outside the United States.
- Residents of the United States expressed greater interest in On-the-job training compared to respondents outside the United States.
- Residents outside the United States are driving the selection of Specialized Master’s as the Most Appropriate education option for motivations studied here.
Executive Summary

Key Findings

Employees want more say in professional development planning and execution.

- Having professional development be self-directed with some input from the employer was the most selected option across the majority of audience segments within this study.
- Older respondents and those holding a Bachelor’s or graduate degree selected the Self-directed with some input from employer option at a significantly higher rate than younger respondents and those not holding a degree.
- Respondents indicating they receive no employee reimbursement were significantly more likely to select Self-defined/directed as their first choice.
- Individuals with full reimbursement from their employers were more likely to select Mostly my employer’s decision, with some input from me than those no financial support from their employer.
- Self-defined/directed professional development outranked “just-in-time” programs developed with employers and established programs. This is especially true for respondents 31 to 40 years old.

Preferences for delivery channel, asynchronous versus synchronous format, and institutional funding model vary among demographic segments, and will continue to shift as younger prospective students reach critical career junctures.

- Across all groups within this study, nearly half of respondents indicated equal preference for For-profit or not-for-profit/state-sponsored institutions.
- When examining the specific options, Not-for-profit/state-sponsored was selected at a significantly higher rate among 31- to 40-year-olds. For-profit institutions was selected at a significantly higher rate among respondents 21 to 30 years old.
- Female respondents expressed equal preference for For-Profit or not-for-profit / state-sponsored at a significantly higher rate than male respondents.
- Female respondents were more likely to have Completed at Least One Online and Blended Course compared to male respondents.
- Female respondents preferred Pre-recorded delivery at a significantly higher rate than male respondents; male respondents’ preference for Live delivery is significantly higher than that of female respondents.
- Along with male respondents, younger respondents expressed preferences for Live learning options.
- Overall, respondents who have Completed at Least One Online or Blended Course are most likely to prefer a Mix of Live and Pre-recorded delivery.
Executive Summary

Likelihood of Enrolling in the Next 10 Years

A4. How likely is it that you will enroll in each of the following types of advanced management education programs or courses in the next 10 years?

All Respondents

<table>
<thead>
<tr>
<th>Type of Education</th>
<th>Top 2 Box</th>
<th>Somewhat Likely</th>
<th>Bottom 2 Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master of Business Administration, or MA or MS in Business or Management</td>
<td>14.3%</td>
<td>59.9%</td>
<td>25.8%</td>
</tr>
<tr>
<td>Specialized Master’s (Finance, Accounting, Analytics, etc.)</td>
<td>23.8%</td>
<td>26.3%</td>
<td>47.8%</td>
</tr>
<tr>
<td>Business and Management courses not part of a formal program</td>
<td>21.2%</td>
<td>47.8%</td>
<td>30.4%</td>
</tr>
<tr>
<td>Non-degree Executive Education</td>
<td>31.6%</td>
<td>31.0%</td>
<td>30.4%</td>
</tr>
</tbody>
</table>

Respondents 21 to 30 Year Old

<table>
<thead>
<tr>
<th>Type of Education</th>
<th>Top 2 Box</th>
<th>Somewhat Likely</th>
<th>Bottom 2 Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master of Business Administration, or MA or MS in Business or Management</td>
<td>12.8%</td>
<td>62.2%</td>
<td>25.1%</td>
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<tr>
<td>Specialized Master’s (Finance, Accounting, Analytics, etc.)</td>
<td>21.4%</td>
<td>51.3%</td>
<td>27.4%</td>
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<tr>
<td>Business and Management courses not part of a formal program</td>
<td>21.4%</td>
<td>45.2%</td>
<td>33.4%</td>
</tr>
<tr>
<td>Non-degree Executive Education</td>
<td>32.1%</td>
<td>37.2%</td>
<td>30.7%</td>
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</table>

Respondents 31 to 40 Year Old

<table>
<thead>
<tr>
<th>Type of Education</th>
<th>Top 2 Box</th>
<th>Somewhat Likely</th>
<th>Bottom 2 Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master of Business Administration, or MA or MS in Business or Management</td>
<td>16.1%</td>
<td>57.3%</td>
<td>26.6%</td>
</tr>
<tr>
<td>Specialized Master’s (Finance, Accounting, Analytics, etc.)</td>
<td>26.5%</td>
<td>48.6%</td>
<td>24.9%</td>
</tr>
<tr>
<td>Business and Management courses not part of a formal program</td>
<td>21.0%</td>
<td>50.7%</td>
<td>28.3%</td>
</tr>
<tr>
<td>Non-degree Executive Education</td>
<td>30.9%</td>
<td>39.0%</td>
<td>30.1%</td>
</tr>
</tbody>
</table>
Executive Summary

Master of Business Administration, or MA or MS in Business or Management

Demographic Profile (Significant Differences):
- Males selected Extremely Likely to pursue at a significantly higher rate than Females (Males 39.6% versus Females 30.4%).
- Residents of the United States selected Extremely Likely to pursue at a significantly higher rate than those residing outside the United States (40.5% United States versus 30.0% outside United States).
- Individuals employed Full-time selected Extremely Likely to pursue at a significantly higher rate than those not employed Full-time (38.1% Full-time versus 23.9% not employed Full-time).
- Individuals who have either started graduate work or completed a graduate degree (grouped into one analysis category) selected Extremely Likely to pursue at a significantly higher rate than the two other analysis groups, namely, those who currently hold a Bachelor’s degree, and those who have not started college/started college/hold a two-year Associate’s Degree (43.2% Graduate versus 33.2% Bachelor’s versus 24.9% No college/Associate’s).
- The ratings of Effectiveness of Learning Approaches by those most likely to pursue this advanced management education program are higher compared to All Respondents. This indicates higher expectations among individuals most likely to pursue this advanced management program.

Comparison of Effectiveness of Learning Approaches:
All Versus Respondents Selecting Extremely or Very Likely to Pursue

- On-the-job training
- Hands-on classroom exercises, demonstrations, or workshops
- Project-based learning
- Simulations or competitions
- Case studies
- Small-group seminars
- Presentations done by you and/or other participants
- Lectures

Likelihood to Pursue in Next 10 Years

| Top 2 Box        | Extremely Likely: 34.9% | Very Likely: 25.0% | Somewhat Likely: 25.8% | Not very Likely: 8.5% | Not at All Likely: 5.9% | Bottom 2 Box: 14.3% |

Likelihood to Pursue in Next 10 Years Top 2 Box (Extremely Likely and Very Likely) by Gender

- Female: 56.6%
- Male: 63.1%
Executive Summary

Specialized Master’s (Finance, Accounting, Analytics, etc.)

Likelihood to Pursue in Next 10 Years

- Top 2 Box: 50.0%
- Extremely Likely: 22.2%
- Very Likely: 27.9%
- Somewhat Likely: 26.3%
- Not very Likely: 14.8%
- Not at All Likely: 9.0%
- Bottom 2 Box: 23.8%

Demographic Profile (Significant Differences):

- Males selected Extremely Likely and Very Likely to pursue a Specialized Master’s at a significantly higher rate than Females (Males 24.5% and 30.7%, respectively, versus Females 19.5% and 24.8%).
- Individuals interested in an MBA or MA/MS in Business or Management selected Extremely Likely and Very Likely to pursue a Specialized Master’s program at a significantly higher rate than individuals not interested in the advanced management education program (30.5% Extremely Likely and 35.2% Very Likely versus 9.2% and 16.9%, respectively).
- The ratings of Effectiveness of Learning Approaches by those most likely to pursue this advanced management education program are higher compared to All Respondents across several variables. This indicates higher expectations among individuals most likely to pursue this advanced management program.

Comparison of Effectiveness of Learning Approaches:
All Versus Respondents Selecting Extremely or Very Likely to Pursue

- On-the-job training: 4.0
- Hands-on classroom exercises, demonstrations, or workshops: 3.9
- Project-based learning: 3.9
- Simulations or competitions: 3.8
- Case studies: 3.8
- Small-group seminars: 3.7
- Presentations done by you and/or other participants: 3.4
- Lectures: 3.4

Extremely + Very Likely to Pursue (Top 2 Box)
All Respondents

Likelihood to Pursue in Next 10 Years Top 2 Box (Extremely Likely and Very Likely) by Gender

- Female: 44.3%
- Male: 55.2%
Executive Summary

Business and Management courses not part of a formal program

Likelihood to Pursue in Next 10 Years

<table>
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<tr>
<th>Likelihood</th>
<th>Top 2 Box</th>
<th>Bottom 2 Box</th>
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</thead>
<tbody>
<tr>
<td>Extremely Likely</td>
<td>21.6%</td>
<td>21.2%</td>
</tr>
<tr>
<td>Very Likely</td>
<td>26.2%</td>
<td></td>
</tr>
<tr>
<td>Somewhat Likely</td>
<td>31.0%</td>
<td></td>
</tr>
<tr>
<td>Not very Likely</td>
<td>13.4%</td>
<td></td>
</tr>
<tr>
<td>Not at All Likely</td>
<td>7.8%</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>47.8%</td>
<td></td>
</tr>
</tbody>
</table>

Demographic Profile (Significant Differences):

- Individuals interested in an MBA or MA/MS in Business or Management selected Extremely Likely and Very Likely to pursue Business and Management courses not part of a formal program at a significantly higher rate than individuals not interested in the advanced management education program (27.0% Extremely Likely and 30.5% Very Likely versus 13.0% and 19.4%, respectively).
- Individuals interested in a Specialized Master’s selected Extremely Likely and Very Likely to pursue these informal options at a significantly higher rate than individuals not interested in the advanced management education program (28.8% Extremely Likely and 31.4% Very Likely versus 14.5% and 21.0%, respectively).
- Individuals who have started graduate work or completed a graduate degree (grouped into one analysis category) selected Extremely Likely to pursue this education option at a significantly higher rate than the two other analysis groups, namely, those who hold a Bachelor’s degree, and those who have not started college/started college/held a 2 year Associate’s Degree (26.2% Graduate versus 19.8% Bachelor’s versus 17.9% No college/Associate’s).
- The ratings of Effectiveness of Learning Approaches by those most likely to pursue this advanced management education program are higher compared to All Respondents. This indicates higher expectations among individuals most likely to pursue this advanced management program.

Comparison of Effectiveness of Learning Approaches:

All Versus Respondents Selecting Extremely or Very Likely to Pursue

- On-the-job training
- Hands-on classroom exercises, demonstrations, or workshops
- Project-based learning
- Simulations or competitions
- Case studies
- Small-group seminars
- Presentations done by you and/or other participants
- Lectures

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Executive Summary

Non-degree Executive Education

Likelihood to Pursue in Next 10 Years

Top 2 Box | Extremely Likely | Very Likely | Somewhat Likely | Not very Likely | Not at All Likely | Bottom 2 Box
--- | --- | --- | --- | --- | --- | ---
38.0% | 15.7% | 22.3% | 30.4% | 19.2% | 12.3% | 31.6%

Likelihood to Pursue in Next 10 Years (Top 2 Box) by Gender

- Female: 35.8%
- Male: 39.5%

Demographic Profile (Significant Differences):

- Residents of the United States selected *Extremely Likely* to pursue Non-degree Executive Education at a significantly higher rate than those residing outside the United States (17.7% United States versus 13.9% outside United States).
- Individuals employed Full-time selected *Extremely Likely* to pursue at a significantly higher rate than those not employed Full-time (16.9% Full-time versus 11.7% not employed Full-time).
- Individuals selecting *Extremely Likely* and *Very Likely* to pursue the other three advanced management education programs in this study are also significantly more likely to select the same likelihood for the Non-degree.
- Individuals who have started graduate work or completed a graduate degree (grouped into one analysis category) selected *Extremely Likely* to pursue at a significantly higher rate than the two other analysis groups, namely, those who hold a Bachelor’s degree, and those who have not started college/started college/hold a 2 year Associate’s Degree (20.8% Graduate versus 12.7% Bachelor’s versus 13.8% No college/Associate’s).
- The ratings of Effectiveness of Learning Approaches by those most likely to pursue this advanced management education option are higher compared to All Respondents across most attributes.

Comparison of Effectiveness of Learning Approaches: All Versus Respondents Selecting Extremely or Very Likely to Pursue

- On-the-job training: 4.0, 4.0
- Hands-on classroom exercises, demonstrations, or workshops: 4.0, 3.9
- Project-based learning: 3.9, 3.8
- Simulations or competitions: 3.8, 3.7
- Case studies: 3.8, 3.6
- Small-group seminars: 3.7, 3.5
- Presentations done by you and/or other participants: 3.7, 3.4
- Lectures: 3.6, 3.4

*Extremely + Very Likely to Pursue (Top 2 Box)*

*All Respondents*
Select Insights and Commentary
Select Insights and Commentary

Percept Research was engaged by AACSB International, the Executive MBA Council (EMBAC), and the International Consortium for Executive Education (UNICON) to provide insight into the ‘Digital Generations’ preferences concerning the evolving landscape of management learning and development alternatives. Specifically, how business schools can tailor offerings to attract the younger generations seeking both degree and non-degree ‘executive’ education.

This study focused on individuals currently part of an undergraduate degree program and holders of an undergraduate degree or MBA/Graduate degree between the ages of 21 to 40 across 10 countries. These individuals were then qualified against their likelihood to enroll in one or more of the following:

- Master of Business Administration, or MA or MS in Business or Management
- Specialized Master’s (Finance, Accounting, Analytics, etc.)
- Business and Management courses not part of a formal program (including online options such as MOOCs or Coursera, whether or not for university credit)
- Non-degree Executive Education (University, For-Profit Company, or other Non-University)

*Only respondents that selected Extremely Likely, Very Likely, or Somewhat Likely to one or more of the above options were included in this study.*

### Respondent Summary

![Age Distribution](image)

- 53.0% in 21 to 30
- 47.0% in 31 to 40

![Gender Distribution](image)

- 49.7% Female
- 50.1% Male

<table>
<thead>
<tr>
<th>Current Degree Status</th>
<th>N=1,665</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earned an undergraduate college/university degree</td>
<td>56.2%</td>
</tr>
<tr>
<td>Earned an MBA/Graduate degree in Business or Management</td>
<td>23.2%</td>
</tr>
<tr>
<td>Currently enrolled in an undergraduate college/university degree program</td>
<td>20.5%</td>
</tr>
</tbody>
</table>

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<td>China</td>
<td>108</td>
<td>6.5%</td>
</tr>
<tr>
<td>France</td>
<td>110</td>
<td>6.6%</td>
</tr>
<tr>
<td>India</td>
<td>102</td>
<td>6.1%</td>
</tr>
<tr>
<td>Singapore</td>
<td>36</td>
<td>2.2%</td>
</tr>
<tr>
<td>South Africa</td>
<td>78</td>
<td>4.7%</td>
</tr>
<tr>
<td>Spain</td>
<td>112</td>
<td>6.7%</td>
</tr>
<tr>
<td>UK</td>
<td>110</td>
<td>6.6%</td>
</tr>
<tr>
<td>United States</td>
<td>792</td>
<td>47.6%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,665</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>
Select Insights and Commentary

Likelihood of Enrolling in the Next 10 Years

<table>
<thead>
<tr>
<th>Top 3 Motivations</th>
<th>Bottom 2 Box: Not Very Likely or Not at All Likely</th>
<th>Top 2 Box: Extremely Likely Or Very Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master of Business Administration, or MA or MS in Business or Management</td>
<td>14.3%</td>
<td>59.9%</td>
</tr>
<tr>
<td>Specialized Master's (Finance, Accounting, Analytics, etc.)</td>
<td>23.8%</td>
<td>50.0%</td>
</tr>
<tr>
<td>Business and Management courses not part of a formal program</td>
<td>21.2%</td>
<td>47.8%</td>
</tr>
<tr>
<td>Non-degree Executive Education</td>
<td>31.6%</td>
<td>38.0%</td>
</tr>
</tbody>
</table>

Top 3 Motivations

- Improve my (and/or my family's) standard of living (82.4%)
- Improve my leadership/management skills (81.6%)
- Provide increased career stability and job security (81.3%)

Attractiveness of Options

<table>
<thead>
<tr>
<th>Least Attractive</th>
<th>Most Attractive</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

Top Preference for Planning Professional Development

- Mostly my decision: 48.6%
- Equal input from me and my employer: 31.5%
- Mostly my employer’s decision: 15.2%
- Do not know: 4.6%

Effectiveness of Learning Approaches

- On-the-job training: 4.0
- Hands-on classroom exercises, demonstrations, or workshops: 3.9
- Project-based learning: 3.8
- Case studies: 3.6
- Simulations or competitions: 3.6
- Small-group seminars: 3.5
- Presentations done by you and/or other participants: 3.4
- Lectures: 3.4
Select Insights and Commentary

Motivations for Pursuing Advanced Management Education

Respondents were asked to rate the importance of a series of statements as it relates to motivations for pursuing an advanced management education. The results provide insights into how providers can target messaging to potential students. The table below indicates the motivations that received an above average rating (4.0 or higher) — motivations with a below average rating are not displayed (means in parentheses).

- Improve my (and/or my family’s) standard of living (4.3)
- Provide increased career stability and job security (4.2)
- Improve my leadership/management skills (4.2)
- Improve my technical/functional skills (4.2)
- Make it easier to advance in my field or organization I am in at that time (4.1)
- Increase my professional network (4.1)
- Gain additional respect and credibility in my current job (4.0)

Source: B1. How important are each of the following motivations to your interest in pursuing future advanced management education? 1 to 5 scale with 1 = Not at all Important and 5 = Extremely Important. Mean across all variables is 4.0.

*Improving my (and/or my family’s) standard of living* was the highest rated variable in terms of motivation. Over 51% of respondents rated this motivation as *Extremely Important*, making it the only motivation to receive such a high rating from over half of all respondents. *Provide increased career stability and job security* and *Improve my leadership/management skills* received the second and third highest *Extremely Likely* ratings (46.5% and 45.5%, respectively).
Gender diversity is recognized by corporations and the advanced management education industry alike as a focal point for identifying talent and fostering a diverse workforce. The 2015 Phase 2 study by Executive Core found that 80% of the corporations they interviewed had a focus on accelerating females through their development programs and into top positions. Phase 3 data exhibits distinctions in motivations for advanced management education between female and male respondents. Female respondents in this study did provide statistically significant higher ratings for *Provide increased career stability and job security* than their male counterparts (4.3 versus 4.2). Male respondents, however, provided significantly higher ratings for *Make it easier to start my own business* (3.8 versus 3.6), but this was not one of the main motivations referenced on the previous page. Female respondents are looking at the MBA or MA/MS in Management to *Improve my standard of living* and *Provide increased career stability and job security*; however, female respondents look to Management courses and Non-Degree Executive Education to *Gain additional respect and credibility in my current job*.

Select Insights and Commentary

Motivations and Age

Although there are no significant differences between age and the seven top-rated motivations, there are some differences within the three motivations rated lowest overall. For example, 21- to 30-year-olds consider *Make it easier to start my own business* and *Obtain international exposure and access* more motivating than their older counterparts. Conversely, those between 31 and 40 years old give more credence to advanced management education to *Make it easier to change fields or organizations*.

Source: B1. How important are each of the following motivations to your interest in pursuing future advanced management education?

Motivations and Geography

While overall ranking is not impacted dramatically, there are significant differences in geography when comparing motivations of respondents from the United States to those of other countries. The top three overall motivations received significantly higher ratings from respondents from the United States compared to residents outside the United States. *Make it easier to advance in my field or organization*, the sixth highest rated motivation, also received higher ratings in the United States. *Obtain international exposure and access* was the one motivation that received significantly higher ratings from respondents outside the United States.

Source: B1. How important are each of the following motivations to your interest in pursuing future advanced management education?
Motivations and Education Choices

Overall, the MBA or MA/MS in Management is considered the Most Appropriate choice across all motivations. This type of advanced management education received its highest ratings across two of the top three motivations - *Improve my (and/or my family’s) standard of living* (36.6%) and *Provide increased career stability and job security* (35.3%).

The Specialized Master’s received the second highest ratings across all motivations. When it comes to *Improve my technical/functional skills*, this type of program was the most often selected (30.9%). This program type was also selected as the Most Appropriate by close to 30% of respondents across an additional two of the top motivations - *Gain additional respect and credibility in my current job* (30.8%) and *Make it easier to advance in my field or organization I am in at the time* (29.3%). According to *Mastering the Mix*, by Tricia Bisoux, the number of specialized masters programs offered by MBA programs has increased by over 10% from 2009 to 2013. It is apparent that business schools are reacting to this trend, and the findings in this study support that this is an opportunity for growth.

Leveraging the key motivations can assist in attracting prospective students and working with corporations to partner in these programs.

*Improve my leadership/management skills* (30.7%) was the only motivation in which Management Courses received significant responses. Management Courses was selected as the second Most Appropriate choice for *Make it easier to start my own business* (27.4%), *Improve my technical/functional skills* (26.8%) and *Increase my professional network* (24.8%).

Non-Degree Executive Education received the lowest frequency of Most Appropriate choice across all motivations except for *Improve my leadership/management skills* (18.6%) where it was the second lowest. For this education channel, younger respondents did provide significantly higher ratings than older respondents across several motivations. This includes *Gain additional respect and credibility in my current job, Make it easier to advance in my current field or organization*, *Make it easier to change fields or organizations, Improve my leadership/management skills, Improve my standard of living and Provide increased career stability and job security*. There is also a similar trend among those not holding a college degree and those bearing a two-year Associate’s degree.

When examining across all four advanced management education options, it should be noted that 41.5% of respondents selected Non-Degree Executive Education or Management Courses. This indicates that there is a strong demand for informal and non-graduate degree education options. While not consistent across all variables, there is tendency for those with an two-year Associate’s degree or a graduate degree to state that Informal, non-graduate degree options are the Most Appropriate choice for certain motivations, including *Gain additional respect and credibility in my current job, Increase my professional network, Improve my leadership/management skills and Make it easier to change fields or organizations*.

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Select Insights and Commentary

Education Options Deemed Most and Least Appropriate for Motivations

As expected, there is an inverse relationship between the selection of Most Appropriate and Least Appropriate in terms of motivations of advanced executive education. The charts below demonstrate this relationship across the top six motivations by displaying the difference between these two ratings (positive number indicates higher percentage selected as Most Appropriate compared to Least Appropriate).

### Improve my (and/or my family's) standard of living

<table>
<thead>
<tr>
<th>Education Option</th>
<th>Most Appropriate</th>
<th>Least Appropriate</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBA or MA/MS in Management</td>
<td>19.4%</td>
<td>-16.0%</td>
</tr>
<tr>
<td>Specialized Master's</td>
<td>10.4%</td>
<td>-13.8%</td>
</tr>
<tr>
<td>Non-Degree Executive Management Courses</td>
<td>-13.8%</td>
<td></td>
</tr>
<tr>
<td>Management Courses</td>
<td>-40.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

### Provide increased career stability and job security

<table>
<thead>
<tr>
<th>Education Option</th>
<th>Most Appropriate</th>
<th>Least Appropriate</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBA or MA/MS in Management</td>
<td>18.0%</td>
<td>-16.0%</td>
</tr>
<tr>
<td>Specialized Master's</td>
<td>9.4%</td>
<td>-11.4%</td>
</tr>
<tr>
<td>Non-Degree Executive Management Courses</td>
<td>-11.4%</td>
<td></td>
</tr>
<tr>
<td>Management Courses</td>
<td>-40.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

### Improve my leadership/management skills

<table>
<thead>
<tr>
<th>Education Option</th>
<th>Most Appropriate</th>
<th>Least Appropriate</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBA or MA/MS in Management</td>
<td>14.9%</td>
<td>-4.2%</td>
</tr>
<tr>
<td>Specialized Master's</td>
<td>1.2%</td>
<td>-12.0%</td>
</tr>
<tr>
<td>Non-Degree Executive Management Courses</td>
<td>-12.0%</td>
<td></td>
</tr>
<tr>
<td>Management Courses</td>
<td>-40.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

### Improve my technical/functional skills

<table>
<thead>
<tr>
<th>Education Option</th>
<th>Most Appropriate</th>
<th>Least Appropriate</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBA or MA/MS in Management</td>
<td>5.9%</td>
<td>-13.5%</td>
</tr>
<tr>
<td>Specialized Master's</td>
<td>9.8%</td>
<td>-2.3%</td>
</tr>
<tr>
<td>Non-Degree Executive Management Courses</td>
<td>-2.3%</td>
<td></td>
</tr>
<tr>
<td>Management Courses</td>
<td>-40.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

### Make it easier to advance in my field or organization I am in at that time

<table>
<thead>
<tr>
<th>Education Option</th>
<th>Most Appropriate</th>
<th>Least Appropriate</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBA or MA/MS in Management</td>
<td>12.9%</td>
<td>-13.9%</td>
</tr>
<tr>
<td>Specialized Master's</td>
<td>8.8%</td>
<td>-7.8%</td>
</tr>
<tr>
<td>Non-Degree Executive Management Courses</td>
<td>-7.8%</td>
<td></td>
</tr>
<tr>
<td>Management Courses</td>
<td>-40.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

### Increase my professional network

<table>
<thead>
<tr>
<th>Education Option</th>
<th>Most Appropriate</th>
<th>Least Appropriate</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBA or MA/MS in Management</td>
<td>15.9%</td>
<td>-10.9%</td>
</tr>
<tr>
<td>Specialized Master's</td>
<td>2.8%</td>
<td>-7.9%</td>
</tr>
<tr>
<td>Non-Degree Executive Management Courses</td>
<td>-7.9%</td>
<td></td>
</tr>
<tr>
<td>Management Courses</td>
<td>-40.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Source: B2A-J. Which type of advanced management education do you think would be the most appropriate choice for each of the following motivations? Results presented are average across all motivations.

Source: B3A-J. Which type of advanced management education do you think would be the least appropriate choice for each of the following motivations? Results presented are average across all motivations.
Select Insights and Commentary

Delivery Methods

Business schools are exploring new delivery methods in an attempt to adapt to the changing requirements of the market. According to the Executive MBA Council’s annual Membership Program Survey, over 46.7% of programs reported coursework was delivered through distance learning. Online delivery of courses, both full delivery or hybrid delivery, has been under consideration by traditional classroom-based institutions for several years. According to “Mastering the Mix,” several global business schools have, or are considering, shutting down classroom-based programs in favor of hybrid approaches. The discontinuation of the face-to-face full-time MBA program at the University of Iowa Tippie College of Business is one recent example of a shift from traditional models to meet the changing demands of the market.

Among the respondents to this study, 54.0% indicated they have Completed at Least One Online or Blended Course. This covers both undergraduate or graduate courses across any field. Conversely, 25.1% of respondents have Never Taken an Online or Blended Course.

The findings of this study suggest that while older respondents may have had more opportunity to pursue and complete Online or Blended Courses, female respondents were significantly more likely to take advantage of that delivery method compared to male respondents:

- Female respondents are significantly more likely to have Completed at Least One Online or Blended Course compared to male respondents (56.7% versus 51.6%).
- Respondents 31 to 40 years old are significantly more likely to have Completed at Least One Online or Blended Course compared to their younger counterparts (57.5% versus 50.9%). The same can be said of respondents in the United States compared to those outside the United States (60.6% versus 48.0%).
- Respondents 21-30 years old are significantly more likely to have Started an Online or Blended Course but Never Completed One compared to those 31-40 years old (25.0% versus 16.2%). Respondents outside the United States also follow the same trend compared to those residing in the United States (23.5% versus 18.1%).

Source: C1. How would you describe your own experience with online learning at the undergraduate or graduate level (in any field, not just management)?

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Select Insights and Commentary

Learning Options

Preference regarding learning options is relatively evenly split across all respondents with a *Mix of Live and Pre-recorded* content being the most popular choice. While female respondents stated this *Mixed* delivery is the preferred method (39.3%), they also prefer *Pre-recorded* delivery at a significantly higher rate than male respondents (36.2% versus 29.9%). Conversely, male respondents slightly prefer *Live* delivery and *Mixed* delivery at a similar rate (35.1% and 35.0% respectively). Their preference for *Live* delivery is significantly higher than female respondents (24.5%).

Source: C2. For subjects which are taught online, or for online components of blended courses, which of the following learning options would you prefer?

Respondents were also asked to state their previous experience with various delivery methods and delivery preferences. The graphic below demonstrates the correlation between experience with an online or blended course and propensity to prefer this mechanism for future courses.

- Individuals who have *Completed at Least One Online or Blended Course* are most likely to prefer a *Mix of Live and Pre-recorded* delivery.
- Respondents who have started but not completed an online or blended course are most likely to prefer *Pre-recorded* delivery exclusively.

From an overall market perspective, content delivered *Live* exclusively is the least preferred method. It should be noted, however, that there is a specific set of respondents that have never taken an online or blended course and still prefers live delivery. This appears to be a shrinking population.
Select Insights and Commentary

Value of Certificate or Digital Badge

This study examined the viability of several new options for advanced management education. One item presented was the concept of receiving certificates or digital badges for completing management courses. According to Jim Fong and Christin Fleming in “Navigational Generational Shifts: Understanding Today’s Student Demographics, Preferences and Expectations,” Universities should be exploring and offering multiple types of credentials.” In fact, their study found that 34% of their respondents are very interested in earning an educational, professional, or skill-based certificate or badge in the future.6

Within this study, almost half of the respondents believe certificates or digital badges are Valuable as a complement to non-degree coursework or program. This is driven by female respondents, where over half (53%) recognized value in this option compared to 44% of males. A similar trend is present among two other groups: those who work non-full-time versus full-time employment, and those holding a Bachelor’s degree versus working towards or holding a graduate degree. Individuals not considering pursuing an MBA, Specialized Master’s, or Business and Management courses not part of a formal program in the next ten years are more likely to find certificates and digital badges Valuable as a complement to non-degree coursework compared to those Extremely or Very Likely to pursue these options.

Over a quarter of the respondents believe it can be Valuable as a substitute to a formal degree program. While not as high as the previously mentioned options, 17.4% of respondents did indicate these options are equally valuable to a formal or non-degree program as a substitute or complement. The sizeable percentage of respondents indicating value, combined with only 8.4% indicating it is Not at all valuable, supports the belief that alternatives to traditional credentials is growing in popularity.

Source: D1. For your own professional development, how would you compare the value of a certificate or digital badge to a degree program in helping you reach your goals?

6 Fong, Jim and Fleming, Christina, “Navigating Generational Shifts: Understanding Today’s Student Demographics, Preferences and Expectations.” June 2017, page 8.
Perceived Value of Traditional and Non-Traditional Education Credentials

Approximately 50.4% of respondents that believe certificates or digital badges are \textit{Valuable as a substitute to a formal degree program} are \textit{Extremely Likely} to pursue this option as a way to achieve professional or personal goals. In fact, more than 3 in 4 are \textit{Extremely Likely} or \textit{Very Likely} to pursue certificates or digital badges. This rate is significantly higher than those that see this option as \textit{Valuable as a complement to non-degree coursework or program} and \textit{Equally valuable to a formal or non-degree program as a substitute or complement}. Respondents interested in an advanced management education program are also more likely to be interested in a digital badge or certificate.

### Likelihood to Pursue a Certificate or Digital Badge by Perceived Value

<table>
<thead>
<tr>
<th>Perceived Value</th>
<th>Extremely Likely</th>
<th>Very Likely</th>
<th>Somewhat Likely</th>
<th>Not Very Likely</th>
<th>Not at All Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valuable as a substitute to a formal degree program (N=419)</td>
<td>2.4%</td>
<td>5.0%</td>
<td>15.8%</td>
<td>26.5%</td>
<td>50.4%</td>
</tr>
<tr>
<td>Equally valuable to a formal or non-degree program as a substitute or complement (N=276)</td>
<td>2.9%</td>
<td>5.8%</td>
<td>25.7%</td>
<td>34.1%</td>
<td>23.2%</td>
</tr>
<tr>
<td>Valuable as a complement to non-degree coursework or program (N=773)</td>
<td>2.3%</td>
<td>8.5%</td>
<td>36.1%</td>
<td>29.9%</td>
<td>23.2%</td>
</tr>
</tbody>
</table>

**Source:** D2. How likely would you be to pursue a certificate or digital badge to achieve your professional or personal goals?

There is a direct correlation between likelihood to pursue an advanced management education program and likelihood to pursue a certificate or digital badge. For example, regarding respondents who stated they are \textit{Extremely Likely} or \textit{Very Likely} to pursue a Master of Business Administration, or MA or MS in Business or Management in the next ten years, they were significantly more likely also to report they are \textit{Extremely Likely} to pursue a certificate or digital badge to achieve their professional or personal goals (42.0% versus 15.5% of those who are \textit{Somewhat Likely, Not Very Likely or Not at All Likely}). This trend can be seen across all four advanced management education programs within this study.
Perceived Value of Traditional and Non-Traditional Education Credentials

Respondents were asked to provide additional detail on reasons that would influence how likely they would be to pursue a certificate or digital badge. Overall, respondents’ most frequently mentioned items relate to the flexibility of such an option. Individuals gave numerous mentions on the convenience it would provide in their attempt to juggle their current employment while furthering their desire to gain additional knowledge. In addition, respondents perceive that certificates and digital badges would be a valuable tool in their career growth as a tangible certification would provide them additional credibility. The word cloud below highlights key themes in respondents’ explanations for their interests in certificates and digital badges.

Note: Verbatim responses were examined and coded by key themes. Those themes are represented below with extraneous words removed. The larger the word, the more frequently the term was mentioned.

Source: D2. Please explain your answer in the previous question by telling us the reasons that influence how likely you would be to pursue a certificate or digital badge.
Select Insights and Commentary

Attractiveness of Advanced Management Education Customization

Respondents were asked to rate the attractiveness of customized advanced management education options using a three-point scale (1=Most Attractive and 3=Least Attractive). Self-defined/directed professional development received the most ‘1’ mentions across all three options presented. “Just-in-time” courses received the second most ‘1’ mentions with established programs a distant third. In fact, Established programs received more ‘3’ ratings than Self-directed and “just-in-time” combined.

Source: D4. Please rank the following three alternatives on how attractive they are to you, with “1” as the Most Attractive and “3” as Least Attractive, as a way of achieving your goals?

Individuals 31 to 40 years old favor a Self-defined/directed option at a significantly higher rate than those 21 to 30 years old. Comparing the mean result, the older age group scored Self-defined/directed at 1.7 versus 1.8 for the younger group. Conversely, 21- to 30-year-olds gave established programs a mean score of 2.3, which is significantly lower than the 2.4 from 31- to 40-year-olds. Individuals holding a Bachelor's degree find Self-defined/directed options more appealing than both those holding a Graduate degree and groups with a two-year Associates degree/some college/no degree. Respondents with full-time employment believe established programs are the least attractive option at a significantly higher rate compared to respondents with part-time or not currently employed. The same trend holds true for residents of the United States compared to those residing outside the United States.
Attractiveness of Customization by Intent to Pursue Advanced Management Education

Trends do emerge when examining by individuals who stated they were Extremely Likely to one of the four degree options presented. Individuals most likely to pursue an MBA or MA/MS in Business or Management are significantly more interested in the self-defined route. This is influenced by individuals who are currently employed full-time and perhaps looking for more flexibility to fit their schedule. Specialized Master’s, while not as closely aligned to employment status, also follows a similar trend. This is further supported by the findings from “Future Trends of Leadership Development” which stated companies are seeking customized and “just-in-time” learning that supports better alignment with their needs and market trends.7

Percentage of ‘1’ Ratings By Those “Extremely Likely” To Pursue a Degree
Source: D4 by A4.

<table>
<thead>
<tr>
<th>Established Program</th>
<th>Just-in-Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Degree Exec. Education</td>
<td>29.0%</td>
</tr>
<tr>
<td>Bus./Mgmt Courses Not Part of Formal Program</td>
<td>27.3%</td>
</tr>
<tr>
<td>Specialized Master’s</td>
<td>25.4%</td>
</tr>
<tr>
<td>MBA or MA/MS in Business</td>
<td>21.9%</td>
</tr>
<tr>
<td>Non-Degree Exec. Education</td>
<td>32.9%</td>
</tr>
<tr>
<td>Bus./Mgmt Courses Not Part of Formal Program</td>
<td>34.4%</td>
</tr>
<tr>
<td>Specialized Master’s</td>
<td>34.0%</td>
</tr>
<tr>
<td>MBA or MA/MS in Business</td>
<td>35.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Self-defined/Directed</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Degree Exec. Education</td>
<td>38.1%</td>
</tr>
<tr>
<td>Bus./Mgmt Courses Not Part of Formal Program</td>
<td>38.4%</td>
</tr>
<tr>
<td>Specialized Master’s</td>
<td>40.6%</td>
</tr>
<tr>
<td>MBA or MA/MS in Business</td>
<td>43.1%</td>
</tr>
</tbody>
</table>

Almost half of the individuals in this study prefer to have the content, delivery and provider of their advanced management education be primarily self-directed with some input from their employer. Slightly over 30% more believe it should be based on equal input from their employer. Business schools will have to work with both employees and employers to ensure their input is taken into consideration but ensure neither group is alienated through perception of it being driven primarily by the learner or employer.

Another trend in the industry is providing credit for life/work experience. In spite of the potential downside of not having as much knowledge on the subject and lack of documentation of knowledge (i.e., course not on transcript), 89% of respondents are either Extremely Likely, Very Likely, or Somewhat Likely to pursue this option.

There is also a correlation between individuals Extremely Likely to pursue an advanced management program in the next 10 years and likelihood to pursue credit for life/work experiences. This is largely driven by individuals who are currently employed full-time.

Source: D5. Some employers can influence the content, delivery, and provider of advanced management education for their employees. If these were not solely the employer’s decision, and you were interested in advanced management education, which of the following options would you prefer when planning for your professional development?

- Mostly my decision, with some input from my employer
- Equal input from me and my employer
- Mostly my employer’s decision, with some input from me
- Do not know

Source: D6. How likely would you be to pursue this option (credit for life/work experience) if it were available to you as part of an advanced management education program?

A4. How likely is it that you will enroll in each of the following types of advanced management education programs or courses in the next 10 years? Results come only from those who responded Extremely Likely.
Select Insights and Commentary

Type of Institutions

Comparing education providers, respondents in this study identified For-profit institutions as the least desirable institution type for advanced management education. Instead, Not-for-profit or state-sponsored institutions were selected at a higher rate. Female respondents expressed Equal preference, for-profit or not-for-profit / state-sponsored at a significantly higher rate than male respondents (50.5% versus 42.1%). Younger respondents were more likely to select For-Profit institutions than older respondents. Older respondents stated preference for Not-for-profit or state-sponsored at a significantly higher rate than their younger counterparts.

Source: D7. For your own professional development, would you be more likely to pursue a program offered by a for-profit institution compared to a program offered by a not-for-profit or state-sponsored college/university?

When examining the results by individuals Extremely Likely or Very Likely to pursue some type of advanced management education in the next 10 years, the preferences do not change significantly. Individuals interested in Non-degree Executive Education are the most likely to consider a Not-for-profit or state-sponsored institution.

Institution Preference by Those ”Extremely Likely” To Pursue a Degree

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Not for profit or state sponsored</th>
<th>For profit or not for profit / state sponsored</th>
<th>For profit</th>
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</thead>
<tbody>
<tr>
<td>Master of Business Administration, or MA or MS in Business or Management</td>
<td>44.9%</td>
<td>25.0%</td>
<td>30.0%</td>
</tr>
<tr>
<td>Specialized Master’s (Finance, Accounting, Analytics, etc.)</td>
<td>46.9%</td>
<td>26.1%</td>
<td>27.1%</td>
</tr>
<tr>
<td>Business and Management courses not part of a formal program</td>
<td>46.0%</td>
<td>25.3%</td>
<td>28.8%</td>
</tr>
<tr>
<td>Non-degree Executive Education</td>
<td>45.3%</td>
<td>25.9%</td>
<td>28.9%</td>
</tr>
</tbody>
</table>
Country-Specific Infographics
Australia (N=111)

Current Status
- Currently enrolled in undergrad. college/univ. degree program: 24.3%
- Earned an undergraduate college/university degree: 60.4%
- Earned an MBA/Grad. degree in Bus. Or Mgmt.: 15.3%

Full-Time Work Experience
- 0 Years: 10.8%
- 1-5 Years: 35.1%
- 6-10 Years: 29.7%
- More than 10 Years: 24.3%

Likelihood of Enrolling in the Next 10 Years

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Not at All Likely</th>
<th>Not Very Likely</th>
<th>Somewhat Likely</th>
<th>Very Likely</th>
<th>Extremely Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master of Business Administration, or MA or MS in Business or Management</td>
<td>8.3%</td>
<td>10.1%</td>
<td>33.9%</td>
<td>27.5%</td>
<td>20.2%</td>
</tr>
<tr>
<td>Specialized Master’s (Finance, Accounting, Analytics, etc.)</td>
<td>10.2%</td>
<td>20.4%</td>
<td>32.4%</td>
<td>25.0%</td>
<td>12.0%</td>
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<tr>
<td>Business and Management courses not part of a formal program</td>
<td>7.5%</td>
<td>7.5%</td>
<td>30.8%</td>
<td>29.9%</td>
<td>14.0%</td>
</tr>
<tr>
<td>Non-degree Executive Education</td>
<td>10.3%</td>
<td>20.6%</td>
<td>31.8%</td>
<td>29.9%</td>
<td>7.5%</td>
</tr>
</tbody>
</table>

Top 3 Motivations
- Improve my technical/functional skills (4.1)
- Improve my leadership/management skills (4.0)
- Provide increased career stability and job security (4.0)

Top Preference for Planning Professional Development
- Mostly my decision: 48.6%
- Equal input from me and my employer: 23.4%
- Mostly my employer's decision: 19.8%
- Do not know: 8.1%

Effectiveness of Learning Approaches
- On-the-job training: 3.9
- Project-based learning: 3.7
- Hands-on classroom exercises, demonstrations, or workshops: 3.7
- Small-group seminars: 3.4
- Case studies: 3.4
- Simulations or competitions: 3.3
- Lectures: 3.3
- Presentations done by you and / or other participants: 3.1

Attractiveness of Options
- An established “Just-in-time” program: 2.2
- Self-defined / directed program: 2.0
- Least Attractive: 1.8

Program Preferences by Type of Institution
- Not-for-profit or state-sponsored: 27.0%
- For-profit or not-for-profit / state-sponsored: 47.7%
- For-profit: 25.2%

Note: Scale is reversed where lower is a more positive result
Brazil
(N=106)

Current Status
- Currently enrolled in undergrad. college/univ. degree program: 26.4%
- Earned an undergraduate college/university degree: 45.3%
- Earned an MBA/Grad. degree in Bus. or Mgmt.: 28.3%

Full-Time Work Experience
- 0 Years: 4.7%
- 1-5 Years: 35.8%
- 6-10 Years: 36.8%
- More than 10 Years: 22.6%

Likelihood of Enrolling in the Next 10 Years
- Master of Business Administration, or MA or MS in Business or Management: Not All Likely 7.6%, Not Very Likely 12.4%, Somewhat Likely 23.8%, Very Likely 24.8%, Extremely Likely 31.4%
- Specialized Master’s (Finance, Accounting, Analytics, etc.): Not All Likely 7.6%, Not Very Likely 18.1%, Somewhat Likely 24.8%, Very Likely 21.9%, Extremely Likely 27.6%
- Business and Management courses not part of a formal program: Not All Likely 3.8%, Not Very Likely 5.7%, Somewhat Likely 29.5%, Very Likely 28.6%, Extremely Likely 32.4%
- Non-degree Executive Education: Not All Likely 7.9%, Not Very Likely 19.8%, Somewhat Likely 32.7%, Very Likely 18.8%, Extremely Likely 20.8%

Top 3 Motivations
1. Improve my (and/or my family’s) standard of living (4.4)
2. Improve my technical/functional skills (4.3)
3. Improve my leadership/management skills (4.3)

Attractiveness of Options
- An established “Just-in-time” program: 2.3
- Self-defined / directed: 1.9
- Mostly my decision: 45.3%
- Equal input from me and my employer: 34.9%
- Mostly my employers decision: 17.9%
- Do not know: 1.9%

Program Preferences by Type of Institution
- Not-for-profit or state-sponsored: 31.1%
- For-profit or not-for-profit / state-sponsored: 49.1%
- For-profit: 19.8%

Effectiveness of Learning Approaches
- Hands-on classroom exercises, demonstrations, or workshops: 3.9
- Case studies: 3.9
- Project-based learning: 3.8
- On-the-job training: 3.8
- Simulations or competitions: 3.6
- Lectures: 3.5
- Presentations done by you and / or other participants: 3.4
- Small-group seminars: 3.3

Note: Scale is reversed where lower is a more positive result.
China (N=108)

Current Status
- Currently enrolled in undergrad. college/univ. degree program: 11.1%
- Earned an undergraduate college/university degree: 70.4%
- Earned an MBA/Grad. degree in Bus. or Mgmt.: 18.5%

Full-Time Work Experience
- 0 Years: 3.7%
- 1-5 Years: 43.5%
- 6-10 Years: 37.0%
- More than 10 Years: 15.7%

Likelihood of Enrolling in the Next 10 Years
- Master of Business Administration, or MA or MS in Business or Management: 0.9% Not at All Likely, 6.5% Not Very Likely, 21.5% Somewhat Likely, 30.8% Very Likely, 40.2% Extremely Likely
- Specialized Master’s (Finance, Accounting, Analytics, etc.): 1.9% Not at All Likely, 11.3% Not Very Likely, 22.6% Somewhat Likely, 40.6% Very Likely, 23.6% Extremely Likely
- Business and Management courses not part of a formal program: 3.8% Not at All Likely, 9.4% Not Very Likely, 42.5% Somewhat Likely, 25.5% Very Likely, 18.9% Extremely Likely
- Non-degree Executive Education: 0.9% Not at All Likely, 9.4% Not Very Likely, 41.5% Somewhat Likely, 29.2% Very Likely, 18.9% Extremely Likely

Top 3 Motivations
1. Improve my technical/functional skills (4.3)
2. Improve my leadership/management skills (4.3)
3. Increase my professional network (4.2)

Attractiveness of Options
Least Attractive: 3
Most Attractive: 1
- An established “Just-in-time” program: 2.3
- Self-defined / directed: 2.0
- Mostly my decision: 1.7

Top Preference for Planning Professional Development
- Mostly my decision: 57.4%
- Equal input from me and my employer: 25.0%
- Mostly my employers decision: 15.7%
- Do not know: 1.9%

Effectiveness of Learning Approaches
- Simulations or competitions: 3.8
- Project-based learning: 3.8
- Hands-on classroom exercises, demonstrations, or workshops: 3.8
- Case studies: 3.8
- Small-group seminars: 3.7
- On-the-job training: 3.7
- Presentations done by you and / or other participants: 3.4
- Lectures: 3.3

Program Preferences by Type of Institution
- Not-for-profit or state-sponsored: 30.6%
- For-profit or not-for-profit / state-sponsored: 50.0%
- For-profit: 19.4%
France (N=110)

Current Status
- Currently enrolled in undergrad. college/univ. degree program: 13.6%
- Earned an undergraduate college/university degree: 46.4%
- Earned an MBA/Grad. degree in Bus. or Mgmt.: 40.0%

Full-Time Work Experience
- 0 Years: 1.8%
- 1-5 Years: 48.2%
- 6-10 Years: 36.4%
- More than 10 Years: 13.6%

Likelihood of Enrolling in the Next 10 Years

<table>
<thead>
<tr>
<th>Option</th>
<th>Not at All Likely</th>
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<th>Somewhat Likely</th>
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</thead>
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<td>9.2%</td>
<td>16.5%</td>
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<td>22.0%</td>
<td>15.6%</td>
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<tr>
<td>Specialized Master’s (Finance, Accounting, Analytics, etc.)</td>
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</tr>
<tr>
<td>Non-degree Executive Education</td>
<td>8.3%</td>
<td>15.7%</td>
<td>37.0%</td>
<td>23.1%</td>
<td>15.7%</td>
</tr>
</tbody>
</table>

Top 3 Motivations
- Improve my (and/or my family’s) standard of living (4.1)
- Increase my professional network (3.9)
- Improve my technical/functional skills (3.9)

Attractiveness of Options
- Least Attractive
  - An established “Just-in-time” program: 2.1
  - Self-defined / directed: 2.0
- Most Attractive
  - 1

Program Preferences by Type of Institution
- Not-for-profit or state-sponsored: 40.0%
- For-profit or not-for-profit / state-sponsored: 39.1%
- For-profit: 20.9%

Top Preference for Planning Professional Development
- Mostly my decision: 46.4%
- Equal input from me and my employer: 28.2%
- Mostly my employers decision: 14.5%
- Do not know: 10.9%

Effectiveness of Learning Approaches
- On-the-job training: 3.7
- Project-based learning: 3.5
- Small-group seminars: 3.4
- Simulations or competitions: 3.4
- Presentations done by you and / or other participants: 3.4
- Hands-on classroom exercises, demonstrations, or workshops: 3.4
- Case studies: 3.4
- Lectures: 3.1

Note: Scale is reversed where lower is a more positive result
India (N=102)

Current Status

- Currently enrolled in undergrad. college/univ. degree program: 13.7%
- Earned an undergraduate college/university degree: 52.9%
- Earned an MBA/Grad. degree in Bus. or Mgmt.: 33.3%

Full-Time Work Experience

- 0 Years: 5.9%
- 1-5 Years: 58.8%
- 6-10 Years: 28.4%
- More than 10 Years: 6.9%

Likelihood of Enrolling in the Next 10 Years

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Not at All Likely</th>
<th>Not Very Likely</th>
<th>Somewhat Likely</th>
<th>Very Likely</th>
<th>Extremely Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master of Business Administration, or MA or MS in Business or Management</td>
<td>2.0%</td>
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<td>Business and Management courses not part of a formal program</td>
<td>9.0%</td>
<td>10.0%</td>
<td>19.0%</td>
<td>31.0%</td>
<td>31.0%</td>
</tr>
<tr>
<td>Non-degree Executive Education</td>
<td>5.3%</td>
<td>19.1%</td>
<td>29.8%</td>
<td>27.7%</td>
<td>18.1%</td>
</tr>
</tbody>
</table>

Top 3 Motivations

1. Increase my professional network (4.5)
2. Improve my leadership/management skills (4.5)
3. Provide increased career stability and job security (4.5)

Attractiveness of Options

- Least Attractive
- An established “Just-in-time” program: 2.2
- Self-defined / directed: 2.0
- Most Attractive
- 1

Program Preferences by Type of Institution

- Not-for-profit or state-sponsored: 31.4%
- For-profit or not-for-profit / state-sponsored: 41.2%
- For-profit: 27.5%

Effectiveness of Learning Approaches

- On-the-job training: 4.1
- Simulations or competitions: 4.0
- Project-based learning: 4.0
- Case studies: 4.0
- Small-group seminars: 3.9
- Hands-on classroom exercises, demonstrations, or workshops: 3.9
- Presentations done by you and / or other participants: 3.8
- Lectures: 3.7

Note: Scale is reversed where lower is a more positive result.
South Africa

(N=78)

Current Status

- 32.1% Currently enrolled in undergrad. college/univ. degree program
- 56.4% Earned an undergraduate college/university degree
- 11.5% Earned an MBA/Grad. degree in Bus. or Mgmt.

Full-Time Work Experience

- 46.2% 0 Years
- 37.2% 1-5 Years
- 11.5% 6-10 Years
- 5.1% More than 10 Years

Likelihood of Enrolling in the Next 10 Years

- Master of Business Administration, or MA or MS in Business or Management: 2.6% Not at All Likely, 9.1% Not Very Likely, 23.4% Somewhat Likely, 31.2% Very Likely, 33.8% Extremely Likely
- Specialized Master’s (Finance, Accounting, Analytics, etc.): 7.8% Not at All Likely, 9.1% Not Very Likely, 18.2% Somewhat Likely, 33.8% Very Likely, 31.2% Extremely Likely
- Business and Management courses not part of a formal program: 6.5% Not at All Likely, 7.8% Not Very Likely, 28.6% Somewhat Likely, 35.1% Very Likely, 22.1% Extremely Likely
- Non-degree Executive Education: 14.7% Not at All Likely, 18.7% Not Very Likely, 30.7% Somewhat Likely, 20.0% Very Likely, 16.0% Extremely Likely

Top 3 Motivations

1. Improve my (and/or my family’s) standard of living (4.6)
2. Improve my leadership/management skills (4.5)
3. Improve my technical/functional skills (4.5)

Attractiveness of Options

Note: Scale is reversed where lower is a more positive result

- Least Attractive 3
- An established “Just-in-time” program 2.3
- Self-defined / directed 1.9
- Most Attractive 1

Program Preferences by Type of Institution

- 11.5% Not-for-profit or state-sponsored
- 55.1% For-profit or for-profit / state-sponsored
- 33.3% For-profit

Top Preference for Planning Professional Development

- Mostly my decision 38.5%
- Equal input from me and my employer 47.4%
- Mostly my employers decision 9.0%
- Do not know 5.1%

Effectiveness of Learning Approaches

- On-the-job training 4.2
- Hands-on classroom exercises, demonstrations, or workshops 4.1
- Project-based learning 3.9
- Presentations done by you and / or other participants 3.9
- Lectures 3.8
- Case studies 3.7
- Small-group seminars 3.6
- Simulations or competitions 3.5

Note: Scale is reversed where lower is a more positive result
Spain (N=112)

**Current Status**

- Currently enrolled in undergrad. college/univ. degree program: 17.9%
- Earned an undergraduate college/university degree: 69.6%
- Earned an MBA/Grad. degree in Bus. or Mgmt.: 12.5%

**Full-Time Work Experience**

- 0 Years: 4.5%
- 1-5 Years: 33.0%
- 6-10 Years: 44.6%
- More than 10 Years: 17.9%

**Likelihood of Enrolling in the Next 10 Years**

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Not at All Likely</th>
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<th>Somewhat Likely</th>
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<tr>
<td>Business and Management courses not part of a formal program</td>
<td>5.4%</td>
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<td>41.1%</td>
<td>24.1%</td>
<td>16.1%</td>
</tr>
<tr>
<td>Non-degree Executive Education</td>
<td>7.3%</td>
<td>20.0%</td>
<td>41.8%</td>
<td>23.6%</td>
<td>7.3%</td>
</tr>
</tbody>
</table>

**Top 3 Motivations**

1. Provide increased career stability and job security (4.3)
2. Improve my technical/functional skills (4.2)
3. Improve my leadership/management skills (4.2)

**Top Preference for Planning Professional Development**

- Mostly my decision: 47.3%
- Equal input from me and my employer: 40.2%
- Mostly my employers decision: 11.6%
- Do not know: 0.9%

**Attractiveness of Options**

Note: Scale is reversed where lower is a more positive result

- Least Attractive: 3
- Most Attractive: 1

<table>
<thead>
<tr>
<th>Option</th>
<th>Attractiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>An established “Just-in-time” program</td>
<td>2.3</td>
</tr>
<tr>
<td>Self-defined / directed program</td>
<td>2.0</td>
</tr>
<tr>
<td>Mostly my decision</td>
<td>1.8</td>
</tr>
</tbody>
</table>

**Program Preferences by Type of Institution**

- Not-for-profit or state-sponsored: 33.0%
- For-profit or not-for-profit / state-sponsored: 46.4%
- For-profit: 20.5%

**Effectiveness of Learning Approaches**

- Hands-on classroom exercises, demonstrations, or workshops: 4.0
- On-the-job training: 3.8
- Simulations or competitions: 3.7
- Project-based learning: 3.7
- Case studies: 3.6
- Small-group seminars: 3.4
- Presentations done by you and / or other participants: 3.4
- Lectures: 3.4

Note: Scale is reversed where lower is a more positive result
United Kingdom
(N=110)

**Current Status**
- Currently enrolled in undergrad. college/univ. degree program: 23.6%
- Earned an undergraduate college/university degree: 65.5%
- Earned an MBA/Grad. degree in Bus. or Mgmt.: 10.9%

**Full-Time Work Experience**
- 0 Years: 4.5%
- 1-5 Years: 32.7%
- 6-10 Years: 30.9%
- More than 10 Years: 31.8%

**Likelihood of Enrolling in the Next 10 Years**

<table>
<thead>
<tr>
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<td>22.6%</td>
<td>30.2%</td>
<td>27.4%</td>
<td>9.4%</td>
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</tbody>
</table>

**Top 3 Motivations**
- Provide increased career stability and job security (4.1)
- Improve my (and/or my family’s) standard of living (4.1)
- Improve my technical/functional skills (4.0)

**Effectiveness of Learning Approaches**

<table>
<thead>
<tr>
<th>Learning Approach</th>
<th>Not at All Effective</th>
<th>Very Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-the-job training</td>
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<td>3.0</td>
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<td>Hands-on classroom exercises, demonstrations, or workshops</td>
<td>3.7</td>
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</tr>
<tr>
<td>Project-based learning</td>
<td>3.6</td>
<td>3.0</td>
</tr>
<tr>
<td>Small-group seminars</td>
<td>3.5</td>
<td>3.0</td>
</tr>
<tr>
<td>Simulations or competitions</td>
<td>3.4</td>
<td>3.0</td>
</tr>
<tr>
<td>Lectures</td>
<td>3.4</td>
<td>3.0</td>
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<tr>
<td>Case studies</td>
<td>3.4</td>
<td>3.0</td>
</tr>
<tr>
<td>Presentations done by you and / or other participants</td>
<td>3.1</td>
<td>3.0</td>
</tr>
</tbody>
</table>

**Attractiveness of Options**

- Least Attractive
  - An established “Just-in-time” program: 2.3
  - Self-defined / directed: 1.8
- Most Attractive
  - 1
United States of America
(N=792)

- **Current Status**
  - Currently enrolled in undergrad. college/univ. degree program: 21.1%
  - Earned an undergraduate college/university degree: 53.3%
  - Earned an MBA/Grad. degree in Bus. or Mgmt.: 25.6%

- **Full-Time Work Experience**
  - 0 Years: 3.0%
  - 1-5 Years: 38.5%
  - 6-10 Years: 32.1%
  - More than 10 Years: 26.4%

**Likelihood of Enrolling in the Next 10 Years**

<table>
<thead>
<tr>
<th>Program Type</th>
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<tbody>
<tr>
<td>Master of Business Administration, or MA or MS in Business or Management</td>
<td>6.2%</td>
<td>6.0%</td>
<td>23.3%</td>
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<td>40.4%</td>
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<tr>
<td>Specialized Master's (Finance, Accounting, Analytics, etc.)</td>
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<td>27.2%</td>
<td>27.6%</td>
<td>20.6%</td>
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</tbody>
</table>

**Top 3 Motivations**
- Improve my (and/or my family’s) standard of living (4.4)
- Improve my leadership/management skills (4.3)
- Provide increased career stability and job security (4.3)

**Top Preference for Planning Professional Development**

- Mostly my decision: 50.0%
- Equal input from me and my employer: 30.3%
- Mostly my employer's decision: 15.7%
- Do not know: 4.0%

**Effectiveness of Learning Approaches**

<table>
<thead>
<tr>
<th>Learning Approach</th>
<th>Not at All Effective</th>
<th>Very Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-the-job training</td>
<td>4.1</td>
<td></td>
</tr>
<tr>
<td>Hands-on classroom exercises, demonstrations, or workshops</td>
<td>3.9</td>
<td></td>
</tr>
<tr>
<td>Project-based learning</td>
<td>3.8</td>
<td></td>
</tr>
<tr>
<td>Simulations or competitions</td>
<td>3.7</td>
<td></td>
</tr>
<tr>
<td>Case studies</td>
<td>3.7</td>
<td></td>
</tr>
<tr>
<td>Small-group seminars</td>
<td>3.5</td>
<td></td>
</tr>
<tr>
<td>Presentations done by you and/or other participants</td>
<td>3.5</td>
<td></td>
</tr>
<tr>
<td>Lectures</td>
<td>3.4</td>
<td></td>
</tr>
</tbody>
</table>

**Attractiveness of Options**

<table>
<thead>
<tr>
<th>Option</th>
<th>Attractiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>An established “Just-in-time” program</td>
<td>2.3</td>
</tr>
<tr>
<td>Self-defined / directed</td>
<td>1.9</td>
</tr>
<tr>
<td>Mostly my decision</td>
<td>1.8</td>
</tr>
</tbody>
</table>

**Program Preferences by Type of Institution**

<table>
<thead>
<tr>
<th>Institution Type</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not-for-profit or state-sponsored</td>
<td>32.8%</td>
</tr>
<tr>
<td>For-profit or not-for-profit / state-sponsored</td>
<td>44.4%</td>
</tr>
<tr>
<td>For-profit</td>
<td>22.7%</td>
</tr>
</tbody>
</table>
Age

A1. What is your current age?
N=1,665

Age is split relatively evenly between 21- to 30-year-olds and 31- to 40-year-olds. When it comes to current employment status, 31- to 40-year-olds are significantly more likely to be employed full-time versus part-time. The inverse is true for 21- to 30-year-olds.
Section A: Respondent Summary

Current Residence
A2. In which of the following countries do you currently reside? 
N=1,665

<table>
<thead>
<tr>
<th>Current Residence</th>
<th>N</th>
<th>% of Total</th>
<th>Quota</th>
<th>% of Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>111</td>
<td>6.7%</td>
<td>100</td>
<td>111.0%</td>
</tr>
<tr>
<td>Brazil</td>
<td>106</td>
<td>6.4%</td>
<td>100</td>
<td>106.0%</td>
</tr>
<tr>
<td>China</td>
<td>108</td>
<td>6.5%</td>
<td>100</td>
<td>108.0%</td>
</tr>
<tr>
<td>France</td>
<td>110</td>
<td>6.6%</td>
<td>100</td>
<td>110.0%</td>
</tr>
<tr>
<td>India</td>
<td>102</td>
<td>6.1%</td>
<td>100</td>
<td>102.0%</td>
</tr>
<tr>
<td>Singapore</td>
<td>36</td>
<td>2.2%</td>
<td>30</td>
<td>120.0%</td>
</tr>
<tr>
<td>South Africa</td>
<td>78</td>
<td>4.7%</td>
<td>75</td>
<td>112.0%</td>
</tr>
<tr>
<td>Spain</td>
<td>112</td>
<td>6.7%</td>
<td>100</td>
<td>104.0%</td>
</tr>
<tr>
<td>UK</td>
<td>110</td>
<td>6.6%</td>
<td>100</td>
<td>110.0%</td>
</tr>
<tr>
<td>United States</td>
<td>792</td>
<td>47.6%</td>
<td>800</td>
<td>99.0%</td>
</tr>
<tr>
<td>Total</td>
<td>1,665</td>
<td>100.0%</td>
<td>1,605</td>
<td>103.7%</td>
</tr>
</tbody>
</table>

Respondents from India tend to be younger, male, and more interested in pursuing an MBA degree. Respondents from the United Kingdom are more likely to be female and not interested in pursuing an MBA degree. Respondents from the United States are more interested in pursuing non-degree executive education. Respondents from China are almost exclusively employed full-time and interested in pursuing an MBA or MS and MS in Business or Management, a Specialized Master’s degree, or Non-degree Executive Education.
Current Status
A3. Which one of the following statements best describes you?
N=1,665

- Earned an undergraduate college/university degree: 56.2%
- Earned an MBA/Graduate degree in Business or Management: 23.2%
- Currently enrolled in an undergraduate college/university degree program: 20.5%

The overwhelming majority of respondents have earned an undergraduate degree from a college or university. As one might expect, individuals currently employed in a full-time capacity are significantly more likely to have earned an MBA or graduate degree in Business or Management than either hold an undergraduate degree or be currently enrolled in an undergraduate program. There is also a foreseeable correlation between age and current status: Younger students are more likely to be currently enrolled in a degree program while older students are significantly more likely to have earned an MBA or graduate degree.
**Section A: Respondent Summary**

**Likelihood of Enrolling in the Next 10 Years**

A4. How likely is it that you will enroll in each of the following types of advanced management education programs or courses in the next 10 years?

N ranges from 1,634 to 1,604

(Note: Do Not Know/Not Applicable responses (99s) are not included in respondent count)

The **MBA or MA/MS in Business or Management** received the most interest across the respondent base with 59.9% stating they would be *Extremely* or *Very Likely* to pursue in the next 10 years. Individuals from the United States, male, or currently employed full-time are the drivers of this interest. Respondents who are *Extremely* or *Very Likely* to pursue a Specialized Master’s are more likely to be male and also *Extremely* or *Very Likely* to pursue the other three advanced management education options. Those who are *Extremely* or *Very Likely* to pursue Non-degree Executive Education are currently respondents who are employed full-time, who possess a graduate degree or completed some graduate coursework, and who reside in the United States.
Section B: Advanced Management Education
Motivations

Importance of Motivations in Pursuing Future Advanced Management Education

B1. How important are each of the following motivations to your interest in pursuing future advanced management education?
(Note: Do Not Know/Not Applicable responses (99s) are not included in respondent count)

Motivations are directly correlated to interest to pursue an advanced management education. The higher the interest, the higher ratings given to the series of motivations (see next page for additional data and findings).
# Section B: Advanced Management Education

## Motivations

### Importance of Motivations in Pursuing Future Advanced Management Education

B1. How important are each of the following motivations to your interest in pursuing future advanced management education?

(Note: Do Not Know/Not Applicable responses (99s) are not included in respondent count)

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Not at All Important</th>
<th>Not Very Important</th>
<th>Somewhat Important</th>
<th>Very Important</th>
<th>Extremely Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gain additional respect and credibility in my current job (N=1,643)</td>
<td>1.9%</td>
<td>6.3%</td>
<td>21.9%</td>
<td>33.8%</td>
<td>36.0%</td>
</tr>
<tr>
<td>Obtain international exposure and access (N=1,641)</td>
<td>4.8%</td>
<td>14.0%</td>
<td>23.5%</td>
<td>28.7%</td>
<td>29.1%</td>
</tr>
<tr>
<td>Make it easier to advance in my field or organization I am in at that time (N=1,645)</td>
<td>1.1%</td>
<td>4.6%</td>
<td>16.7%</td>
<td>34.5%</td>
<td>43.1%</td>
</tr>
<tr>
<td>Make it easier to change fields or organizations (N=1,639)</td>
<td>1.6%</td>
<td>7.3%</td>
<td>23.7%</td>
<td>35.8%</td>
<td>31.6%</td>
</tr>
<tr>
<td>Make it easier to start my own business (N=1,637)</td>
<td>4.5%</td>
<td>12.2%</td>
<td>22.4%</td>
<td>29.9%</td>
<td>31.0%</td>
</tr>
<tr>
<td>Improve my leadership/management skills (N=1,647)</td>
<td>1.0%</td>
<td>3.4%</td>
<td>14.0%</td>
<td>36.1%</td>
<td>45.5%</td>
</tr>
<tr>
<td>Improve my technical/functional skills (N=1,647)</td>
<td>0.9%</td>
<td>3.0%</td>
<td>16.1%</td>
<td>35.8%</td>
<td>44.2%</td>
</tr>
<tr>
<td>Improve my (and/or my family’s) standard of living (N=1,645)</td>
<td>0.8%</td>
<td>3.9%</td>
<td>12.9%</td>
<td>30.8%</td>
<td>51.6%</td>
</tr>
<tr>
<td>Increase my professional network (N=1,642)</td>
<td>1.1%</td>
<td>5.1%</td>
<td>19.4%</td>
<td>36.5%</td>
<td>37.9%</td>
</tr>
<tr>
<td>Provide increased career stability and job security (N=1,650)</td>
<td>1.2%</td>
<td>3.6%</td>
<td>13.9%</td>
<td>34.8%</td>
<td>46.5%</td>
</tr>
</tbody>
</table>

Respondents from the United States are driving the ratings for 4 of the top 5 rated motivations (not including Improve my technical/functional skills where both residents of the United States and residents outside the United States gave similar ratings) with significantly higher ratings than those residing outside the United States. As one might expect, individuals employed full-time provided significantly higher ratings to the top three rated motivations versus those not employed full-time. Respondents holding a Bachelor’s or graduate degree give higher ratings to all motivations compared to those with no college or a two-year Associates degree. For all respondents, motivations most frequently rated Not Very or Not at All Important for pursuing advanced management education include Obtaining international exposure and access and Making it easier to start my own business.
## Section B: Advanced Management Education Motivations

### Most Appropriate Type of Advanced Management Education Based on motivations

B2. Which type of advanced management education do you think would be the most appropriate choice for each of the following motivations?

(Note: Do Not Know/Not Applicable responses (99s) are not included in respondent count)

<table>
<thead>
<tr>
<th>Motivation</th>
<th>MBA or MA/MS in Management</th>
<th>Specialized Master’s</th>
<th>Non-Degree Executive Education</th>
<th>Management Courses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gain additional respect and credibility in my current job (N=1,609)</td>
<td>31.6%</td>
<td>30.8%</td>
<td>17.7%</td>
<td>20.0%</td>
</tr>
<tr>
<td>Obtain international exposure and access (N=1,528)</td>
<td>33.2%</td>
<td>27.9%</td>
<td>17.3%</td>
<td>21.5%</td>
</tr>
<tr>
<td>Make it easier to advance in my field or organization I am in at that time (N=1,610)</td>
<td>30.6%</td>
<td>29.3%</td>
<td>18.9%</td>
<td>21.2%</td>
</tr>
<tr>
<td>Make it easier to change fields or organizations (N=1,604)</td>
<td>32.2%</td>
<td>26.0%</td>
<td>19.5%</td>
<td>22.3%</td>
</tr>
<tr>
<td>Make it easier to start my own business (N=1,571)</td>
<td>35.8%</td>
<td>18.7%</td>
<td>18.0%</td>
<td>27.4%</td>
</tr>
<tr>
<td>Improve my leadership/management skills (N=1,622)</td>
<td>33.2%</td>
<td>17.5%</td>
<td>18.6%</td>
<td>30.7%</td>
</tr>
<tr>
<td>Improve my technical/functional skills (N=1,622)</td>
<td>22.9%</td>
<td>30.9%</td>
<td>19.4%</td>
<td>26.8%</td>
</tr>
<tr>
<td>Improve my (and/or my family’s) standard of living (N=1,585)</td>
<td>36.6%</td>
<td>28.0%</td>
<td>16.1%</td>
<td>19.3%</td>
</tr>
<tr>
<td>Increase my professional network (N=1,599)</td>
<td>33.2%</td>
<td>22.7%</td>
<td>19.4%</td>
<td>24.6%</td>
</tr>
<tr>
<td>Provide increased career stability and job security (N=1,610)</td>
<td>35.3%</td>
<td>28.8%</td>
<td>15.8%</td>
<td>20.1%</td>
</tr>
</tbody>
</table>

An MBA or MA/MS in Management is the Most Appropriate type of advanced management education across all motivations but one, *Improve my technical/functional skills*, where a Specialized Master’s degree is the most common choice. Female respondents are looking at the MBA or MA/MS in Management to *Improve my standard of living* and *Provide increased career stability and job security*; however, female respondents look to Management courses and Non-Degree Executive Education to *Gain additional respect and credibility in my current job*. Individuals residing in the United States selected the MBA or MA/MS in Management, and at a significantly higher rate than those outside the United States, to *Make it easier to start my own business*, *Improve my standard of living*, and *Provide increased career stability and job security*. Residents from outside the United States are driving the selection of Specialized Master’s as the Most Appropriate education option for the motivations studied here.
Section B: Advanced Management Education
Motivations

Least Appropriate Type of Advanced Management Education Based on Motivators
B3. Which type of advanced management education do you think would be the least appropriate choice for each of the following motivations?
(Note: Do Not Know/Not Applicable responses (99s) are not included in respondent count)

Gain additional respect and credibility in my current job
(N=1,485)

- MBA or MA/MS in Management
- Specialized Master’s
- Non-Degree Executive Education
- Management Courses

Obtain international exposure and access
(N=1,469)

Make it easier to advance in my field or organization
I am in at that time
(N=1,490)

Make it easier to change fields or organizations
(N=1,506)

Make it easier to start my own business
(N=1,457)

Improve my leadership/management skills
(N=1,508)

Improve my technical/functional skills
(N=1,492)

Improve my (and/or my family’s) standard of living
(N=1,486)

Increase my professional network
(N=1,486)

Provide increased career stability and job security
(N=1,491)

- MBA or MA/MS in Management
- Specialized Master’s
- Non-Degree Executive Education
- Management Courses

Non-degree Executive Education and Management Courses not part of a formal program are the most commonly selected as the Least Appropriate choice across all motivations.
Section C. Advanced Management Education
Online Versus In-Person

Experience with Online Learning (Undergraduate or Graduate)
C1. How would you describe your own experience with online learning at the undergraduate or graduate level (in any field, not just management)?
N=1,665

- 54.0% Completed at Least One Online or Blended Course
- 25.1% Never Taken an Online or Blended Course
- 20.9% Started an Online or Blended Course but Never Completed One

Over half of the respondents indicate they have Completed at Least One Online or Blended Course. Individuals between 31 to 40 years old are significantly more likely to have completed one of these courses than those between 21 to 30 years old, but it is the most selected option across both groups. The same holds true by gender: Female respondents are significantly more likely to have completed at least one online learning option. Younger respondents are significantly more likely to have Started an Online or Blended Course but Never Completed One. Respondents who are Extremely or Very Likely to pursue an advanced management education program in the next ten years are significantly more likely to have Completed at Least One Online or Blended Course. Conversely, those not expressing a high level of interest are significantly more likely to have Never Taken an Online or Blended Course.
Learning Option Preferences for Online Delivery

C2. For subjects which are taught online, or for online components of blended courses, which of the following learning options would you prefer?

N=1,665

<table>
<thead>
<tr>
<th>Learning Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mix of Live and Pre-recorded</td>
<td>36.9%</td>
</tr>
<tr>
<td>Pre-recorded</td>
<td>33.2%</td>
</tr>
<tr>
<td>Live</td>
<td>29.9%</td>
</tr>
</tbody>
</table>

There is a tight distribution of responses across the three learning preferences for online delivery. *Mix of Live and Pre-recorded* is driven by respondents 31 to 40 years old, residing outside the United States, and holding a Bachelor’s degree. Females, residents of the United States, non-full-time employees, individuals without a Bachelor’s or graduate degree, and those without interest in pursuing formal advanced management education programs (e.g., MBA, Specialized Master’s) gave significantly higher ratings to the *Pre-recorded* option. The *Live* learning option received higher ratings from all respondents interested in pursuing an advanced management education program, and notably from males and younger respondents.
Section D. Advanced Management Education
New Options

Value of Certificate or Digital Badge Compared to a Degree Program

D1. One new option is receiving certificates or “digital badges” for completing specific management-related courses. For your own professional development, how would you compare the value of a certificate or digital badge to a degree program in helping you reach your goals?

N=1,624

(Note: Do Not Know responses (5s) are not included in respondent count)

48.2% 
26.1% 
17.4% 
8.4%

The majority of respondents believe certificates and digital badges are Valuable as a complement to non-degree coursework or programs. This is driven by female respondents, where over half (53%) recognized value in this option compared to 44% of males. A similar trend is present among two other groups: those who work non-full-time versus full-time employment, and those holding a Bachelor’s degree versus working toward or holding a Graduate degree. Individuals not considering pursuing an MBA, Specialized Master’s, or Business and Management courses not part of a formal program in the next ten years are more likely to consider certificates and digital badges a complement to non-degree coursework compared to those Extremely or Very Likely to pursue these options.
Section D. Advanced Management Education
New Options

Likelihood to Pursue a Certificate or Digital Badge
D2. How likely would you be to pursue a certificate or digital badge to achieve your professional or personal goals?
N=1,503
(Note: Do Not Know/Not Applicable responses (99's) are not included in respondent count)

Certificates and digital badges are perceived as valued options for achieving professional or personal goals. Only one in ten respondents are not likely to pursue this option (summing Not Very Likely and Not at All Likely). Certificates and digital certificates provide more attractive options for individuals employed full-time and those holding a graduate degree. In addition, respondents Extremely Likely or Very Likely to pursue an advanced management education program are also significantly more likely to consider a certificate or digital badge.
Section D. Advanced Management Education
New Options

Attractiveness of Advanced Management Education Options

D4. There has been a recent increase in the customization of advanced management education. Please rank the following three alternatives on how attractive they are to you, with “1” as the Most Attractive and “3” as Least Attractive, as a way of achieving your goals?

N=1,665

<table>
<thead>
<tr>
<th>Option</th>
<th>Rated '1'</th>
<th>Rated '2'</th>
<th>Rated '3'</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-defined/directed professional development, possibly using employer guidelines</td>
<td>42.9%</td>
<td>35.6%</td>
<td>21.5%</td>
</tr>
<tr>
<td>A “just-in-time” series of courses which you would develop jointly with an employer to better prepare you for your current and/or next job</td>
<td>33.9%</td>
<td>40.7%</td>
<td>25.4%</td>
</tr>
<tr>
<td>An established program, such as one that would be used to earn an MBA at a leading business school</td>
<td>23.1%</td>
<td>23.7%</td>
<td>53.2%</td>
</tr>
</tbody>
</table>

*Self-defined/directed professional development* received the highest percentage of '1' ratings. This was driven by individuals between 31 and 40 years old, holding a Bachelor’s degree, and those considering pursuit of Non-degree Executive Education. A “just-in-time” series of courses received the second highest number of ‘1’ ratings. These ratings were consistent across all of the different groups within this study. There is a correlation between attractiveness of these options and employer reimbursement. Individuals indicating they receive no employee reimbursement are significantly more likely to select *Self-defined/directed* as their first choice. Conversely, respondents with full or partial reimbursement are significantly more likely to select *Self-defined/directed* as a third choice compared to respondents without employee reimbursement.
Section D. Advanced Management Education
New Options

Preference on Planning Professional Development

D5. Some employers can influence the content, delivery, and provider of advanced management education for their employees. If these were not solely the employer’s decision, and you were interested in advanced management education, which of the following options would you prefer when planning for your professional development?

N=1,665

- Mostly my decision, with some input from my employer: 48.7%
- Equal input from me and my employer: 31.5%
- Mostly my employer’s decision, with some input from me: 15.2%
- Do not know: 4.6%

Having professional development be self-directed with some input from the employer was the most selected option across the majority of the groups within this study. Older respondents and those holding a Bachelor’s or graduate degree did select this option at a significantly higher rate than younger respondents and those not holding a degree. Individuals with full reimbursement from their employers are significantly more likely to select Mostly my employer’s decision, with some input from me than those no financial support from their employer.
Section D. Advanced Management Education New Options

Likelihood to Pursue an Advanced Management Education Program that Provides Credit for Life/Work Experience

D6. How likely would you be to pursue this option (credit for life/work experience) if it were available to you as part of an advanced management education program?

N=1,665

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely Likely</td>
<td>29.0%</td>
</tr>
<tr>
<td>Very Likely</td>
<td>32.5%</td>
</tr>
<tr>
<td>Somewhat Likely</td>
<td>27.6%</td>
</tr>
<tr>
<td>Not Very Likely</td>
<td>7.6%</td>
</tr>
<tr>
<td>Not at All Likely</td>
<td>3.3%</td>
</tr>
</tbody>
</table>

Respondents residing in the United States selected *Extremely Likely* to pursue an advanced management education program that gives credit for life/work experience more frequently than those residing outside the United States. Conversely, residents outside the United States selected *Very Likely* at a significantly higher rate. As one might expect, individuals employed full-time are more likely to pursue an advanced management education program that supports credit for life/work experience.
Section D. Advanced Management Education
New Options

Program Preferences by Type of Institution

D7. The role of for-profit institutions in advanced management education is growing in many countries. For your own professional development, would you be more likely to pursue a program offered by a for-profit institution compared to a program offered by a not-for-profit or state-sponsored college/university?

N=1,665

Across all groups within this study, nearly half of respondents indicated equal preference for For-profit or not-for-profit/state-sponsored institutions. When examining the other options, Not-for-profit or state-sponsored was selected at a significantly higher rate among those 31 to 40 years old. The same holds true regarding For-profit institutions among respondents 21 to 30 years old. Nonetheless, For-profit or not-for-profit/state-sponsored was the most commonly selected option for all age groups.
Effectiveness of Learning Approaches for Advanced Management Education

D8. Recognizing that this could vary by subject or by program type, in general how effective would you personally find each of the following learning approaches for advanced management education?

N=1,665

(Sorted by % of Extremely Effective)

<table>
<thead>
<tr>
<th>Learning Approach</th>
<th>Extremely Effective</th>
<th>Very Effective</th>
<th>Somewhat Effective</th>
<th>Not Very Effective</th>
<th>Not at All Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-the-job training</td>
<td>33.0%</td>
<td>39.9%</td>
<td>20.1%</td>
<td>4.9%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Hands-on classroom exercises, demonstrations, or workshops</td>
<td>25.5%</td>
<td>42.9%</td>
<td>24.6%</td>
<td>5.5%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Project-based learning</td>
<td>21.3%</td>
<td>43.4%</td>
<td>27.4%</td>
<td>6.4%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Simulations or competitions</td>
<td>18.4%</td>
<td>38.2%</td>
<td>32.4%</td>
<td>9.2%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Case studies</td>
<td>17.3%</td>
<td>41.9%</td>
<td>30.6%</td>
<td>8.3%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Presentations done by you and/or other participants</td>
<td>15.0%</td>
<td>33.0%</td>
<td>35.9%</td>
<td>13.3%</td>
<td>2.9%</td>
</tr>
<tr>
<td>Small-group seminars</td>
<td>13.2%</td>
<td>38.6%</td>
<td>37.5%</td>
<td>8.6%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Lectures</td>
<td>12.9%</td>
<td>33.3%</td>
<td>37.2%</td>
<td>14.7%</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

Overall, the findings above can provide insight into course design and development. Taking into account the effectiveness ratings of the various learning approaches provides insight for faculty in how to best structure their curriculum to meet the expectations of future students. While relative order of these eleven learning approaches was consistent across most groups, respondents 31 to 40 years old gave significantly higher ratings to the top three items above than their younger counterparts. Female respondents also place more significance than males to On-the-job training, as did residents of the United States. Individuals Extremely Likely or Very Likely to pursue any type of advanced management education in the next ten years gave significantly higher ratings across every learning option.
Section E. Employer and Employment

Full-Time Work Experience
E1. How many total years of full-time work experience do you currently have, excluding part-time work or internships?
N=1,665

- 0 Years: 4.2%
- 1-5 Years: 39.8%
- 6-10 Years: 34.0%
- More than 10 Years: 22.0%

Current Employment Status
E2. What is your current employment status?
N=1,665

- Full-time: 77.5%
- Part-time: 14.2%
- Not Employed: 8.3%

Employer Size
E3. How many people work for your current employer worldwide?
N=1,527

- 1 to 50: 13.4%
- 51 to 100: 13.2%
- 101 to 500: 21.5%
- 501 to 1,000: 18.9%
- 1,001 or More: 30.0%
- Do Not Know: 3.1%

Employer Industry
E4. Which of the following industry categories best describes your current employer?
N=1,527

- Finance, Accounting, Insurance or Real Estate: 15.9%
- Communications or Information Tech.: 13.7%
- Services: 13.4%
- Manufacturing: 8.1%
- Construction: 7.3%
- Healthcare: 7.2%
- Wholesale or Retail Trade: 6.7%
- Public Administration: 5.6%
- Marketing, Advertising or Public Relations: 3.9%
- Transportation: 3.6%
- Utilities: 1.9%
- Other: 12.7%
Section E. Employer and Employment

Employer Reimbursement
E5. What level of reimbursement will your current employer provide for advanced management education? 
N=1,527

- Full: 39.9%
- Partial: 30.2%
- None: 21.7%
- Do Not Know: 8.2%

Employer Learning Platform
E6. Does your current employer have a learning platform where you can take management-related courses? 
N=1,527

- Yes: 54.4%
- No: 37.6%
- Do Not Know: 8.0%

Likelihood of Leveraging For Advanced Management Offering
E7. How likely are you to use each of the following information sources when choosing a specific advanced management education program, offering, or provider? 
N=1,527

- Employers or colleagues: 49.1%
- MBA or other admissions consultants: 46.2%
- Provider or program websites or print materials: 51.2%
- Friends or relatives: 51.8%
- Print or online ratings or rankings: 52.6%
- Print or online directories: 54.8%

Very Likely
Somewhat Likely
Not Likely
Section F. Additional Background Information

Level of Education
F1. What is the highest level of education you have completed (in any field, not just management)?
N=1,665

- No College/University: 1.4%
- Some College/University but No Degree: 10.8%
- Two-year Associate’s Degree: 7.9%
- Three- or Four-Year Bachelor’s Degree: 45.5%
- Some Graduate Work but No Degree: 9.8%
- Master’s-level Degree: 21.7%
- Doctoral-level Degree: 2.8%

Management Education
F2. Which of the following types of management education have you completed? Please select all that apply.
N=1,665

- Two-year Associate’s degree: 16.6%
- Three- or four-year Bachelor’s degree or equivalent: 49.2%
- Non-degree graduate or professional school coursework: 17.8%
- Master of Business Administration, or MA or MS in Business or Management: 23.4%
- Specialized Master’s (Finance, Accounting, Analytics, etc.): 12.0%
- Doctoral-level degree: 4.3%
- Business or Management courses not part of a formal program: 15.6%
- Executive Education (University, For-Profit Company, or other Non-University): 8.2%
- None of the above: 12.8%
Section F. Additional Background Information

Management Education Enrolled
F3. In which of the following types of management education are you currently enrolled? N=1,665

- Two-year Associate’s degree: 6.4%
- Three- or four-year Bachelor’s degree or equivalent: 16.0%
- Non-degree graduate or professional school coursework: 7.1%
- Master of Business Administration, or MA or MS in Business or Management: 15.9%
- Specialized Master’s (Finance, Accounting, Analytics, etc.): 7.2%
- Doctoral-level degree: 2.8%
- Business or Management courses not part of a formal program (including online options such as MOOCs or Coursera): 6.7%
- Executive Education (University, For-Profit Company, or other Non-University): 3.7%
- None of the above: 34.1%

Gender
F4. What is your gender? N=1,649
- Female: 49.7%
- Male: 50.1%
- Other: 0.2%

Impacts to Decision
F5. Do you have a spouse, partner, or child whose needs could affect your decision to pursue advanced management education? N=1,665
- Yes: 54.9%
- No: 45.1%
Appendix

The following deliverables are available as documents separate from this report:

- Questionnaire
- Masked Data Set
- Verbatim Document
- Crosstabs Spreadsheet

The consultants on this project welcome questions:

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