



Understanding Canada's Position in the Global GME Landscape

**Annual Conference
November 2022
University of Calgary**

Kailin Burns, GMAC Market Development



Agenda

- **GMAC Overview**
- **Assessment Trends**
 - Global
 - U.S.
 - Canada
- **Resources to Help You Identify and Recruit Talent**

Kailin Burns, Market Development

- Joined GMAC in January 2017
- Over 16 years of experience in higher education
- **Consults Graduate Management Education programs** in Canada; Western US, Mid-Atlantic US and Northeastern US
- Your source for data, marketing and recruitment insights
- Please contact directly at kburns@gmac.com
- **Fun Facts:** I have kissed the Blarney Stone twice; have jumped out of a plane; volunteered with the Boston Marathon; and spent two seasons working with the New England Patriots.



**A world where every
talented person can benefit
from the best business
education *for them***

**Provide the tools and
information necessary
for schools and talent
to discover and
evaluate *each other***



7,700+

programs worldwide trust the GMAT exam to build diverse classes



12,000,000+

unique visitors to digital properties last year: mba.com, businessbecause.com, gmac.com, thembatour.com, nmat.org



100,000+

business school candidates take the GMAT exam each year



900+

pieces of content developed and delivered



One

Global, nonprofit association



550,000+

names in our database of qualified candidates



50,000+

candidates take NMAT by GMAC exam in India, South Africa, Nigeria & Philippines



35,000+

students registering for our tours



100+

Schools use the Executive Assessment

GMAT™

GMASS™

Executive Assessment

BUSINESS FUNDAMENTALS
POWERED BY KAPLAN

GMAT™ Official Prep



NMAT
by GMAC™

BB BUSINESS BECAUSE

THE MBA TOUR
Your future begins here

Graduate Management Admission Council™

Assessment Trends: Global, U.S. and Canada

Over 900 programs worldwide participated in GMAC's 2022 Application Trends Survey



2022 Sample Stats

950 programs

264 business schools represented

33 countries represented


Executive summary

 **Applications to graduate business programs have dipped back to their pre-pandemic levels**

 **MBA applications have declined but business master's programs are growing with an international interest**

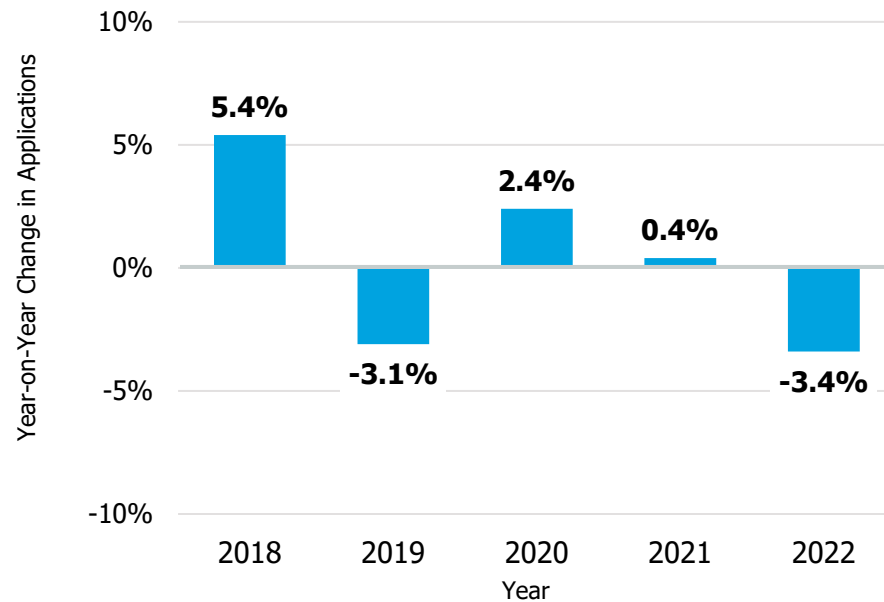
 **European programs have reversed the declines in women applications, while Asia-Pacific programs are trending down**

 **Applications to full-time online programs are declining despite the growing number of programs**

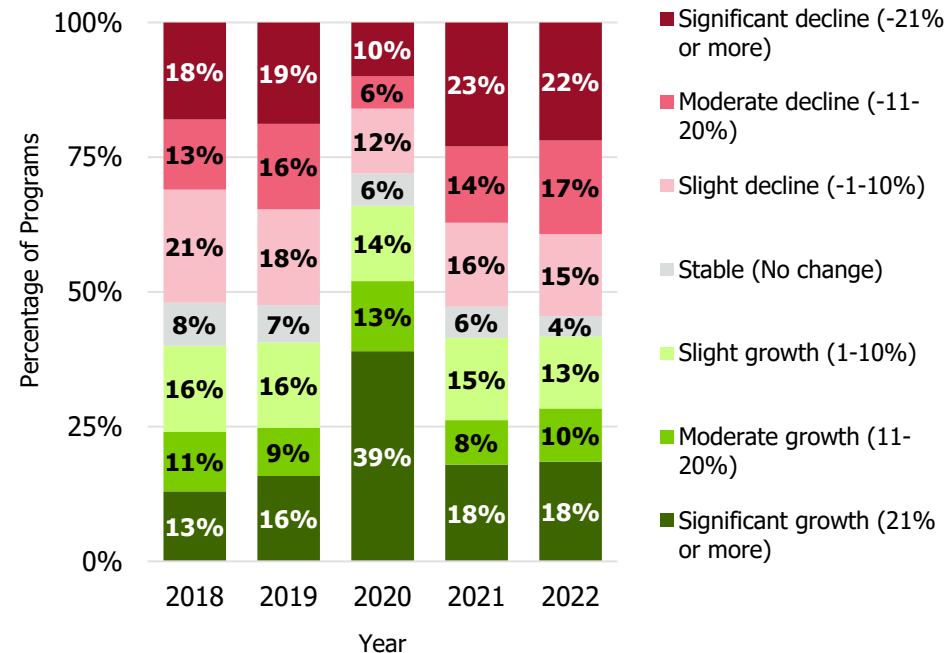
 **Applications from underrepresented populations rise for some business masters program types**

Global applications to graduate business schools dipped from their pandemic highs

Weighted Absolute Year-on-Year Change in Total Applications, 2018-2022



Relative Year-on-Year Change in Total Applications, 2018-2022

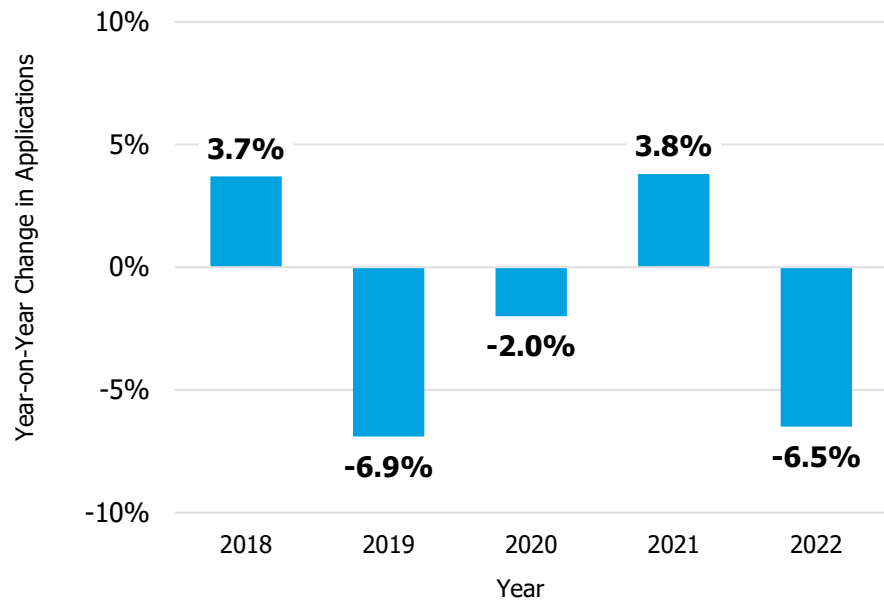


- Total applications slipped 3.4 percent year-on-year among a matched sample of programs.

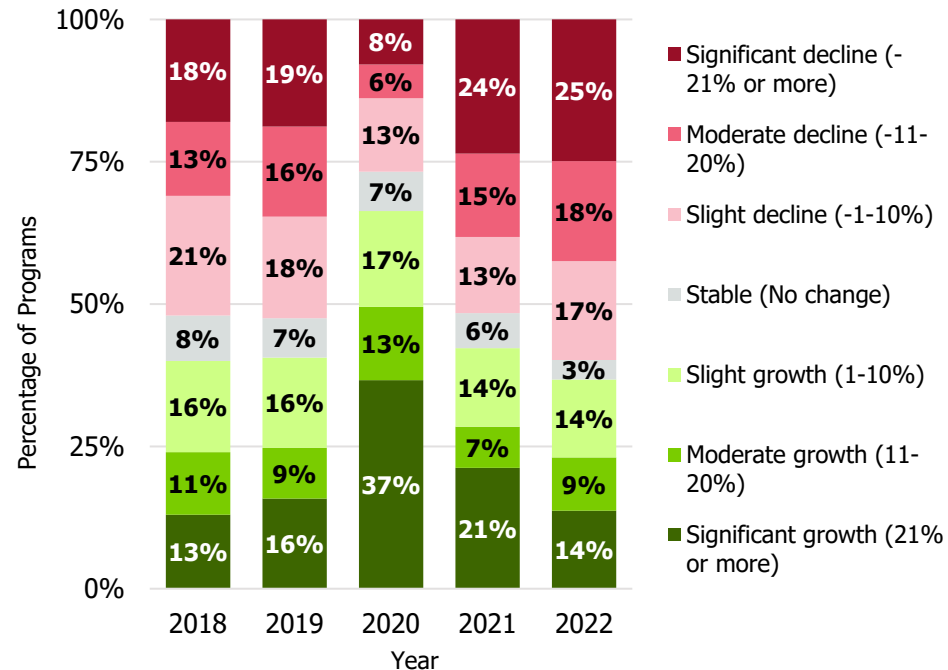
- Among the total sample of responding programs, more reported year-on-year application declines than increases (54% vs. 42%).

MBA applications worldwide cool off in the wake of the pandemic

Weighted Absolute Year-on-Year Change in Total MBA Applications, 2018-2022



Relative Year-on-Year Change in Total MBA Applications, 2018-2022

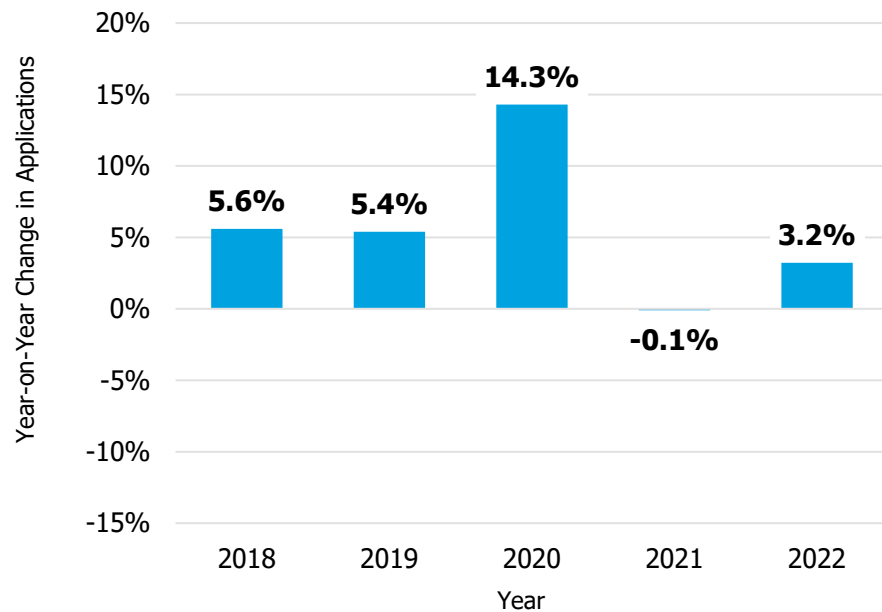


- MBA applications slipped 6.5 percent year-on-year among a matched sample of programs.

- Among the total sample of responding MBA programs, more reported year-on-year application declines than increases (60% vs. 37%).

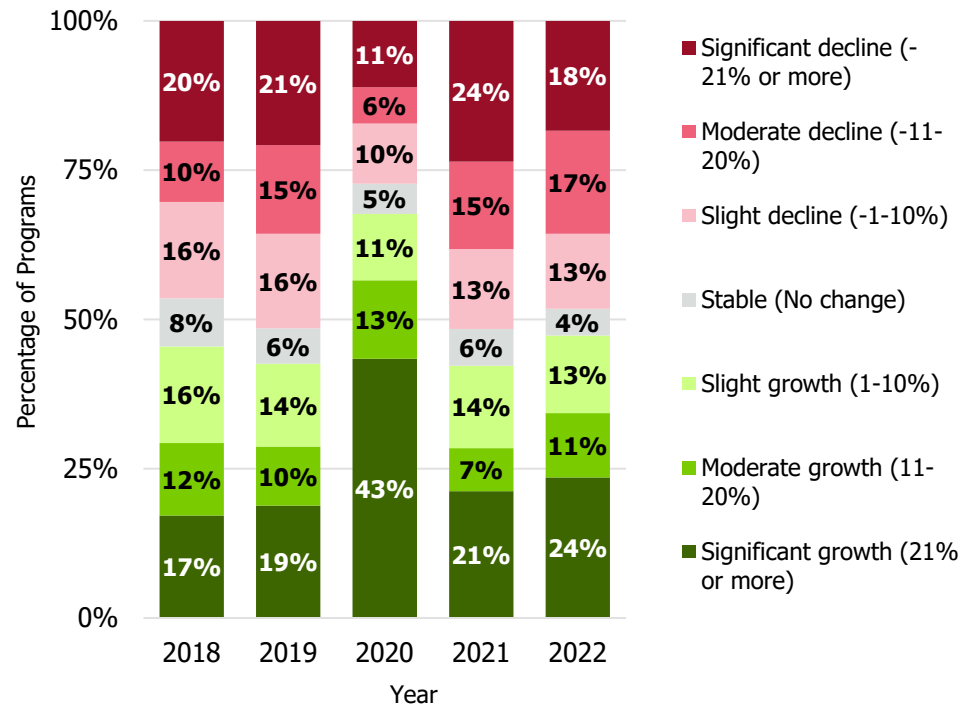
Business master's applications resume year-on-year rise

Weighted Absolute Year-on-Year Change in Total Business Master's Applications, 2018-2022



- Applications to business master's programs rose 3.2 percent year-on-year among a matched sample of programs.

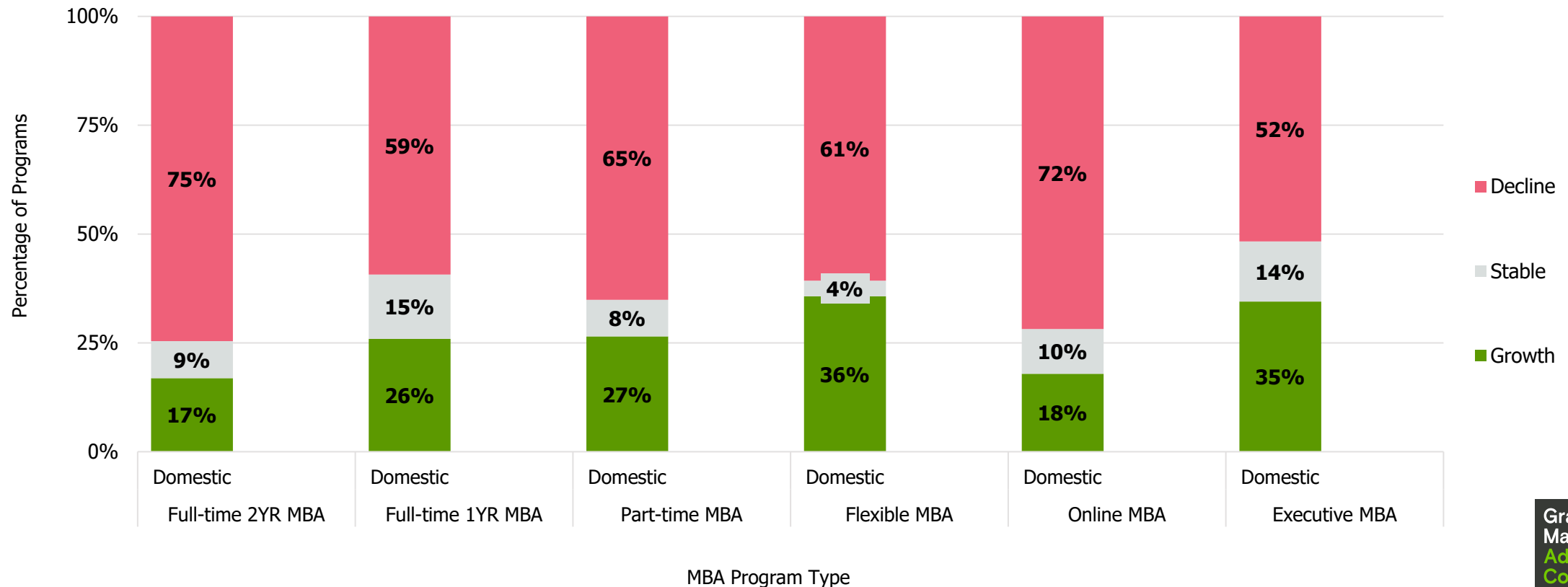
Relative Year-on-Year Change in Total Business Master's Applications, 2018-2022



- Among the total sample of responding business master's programs, equal proportions reported year-on-year application increases and declines.

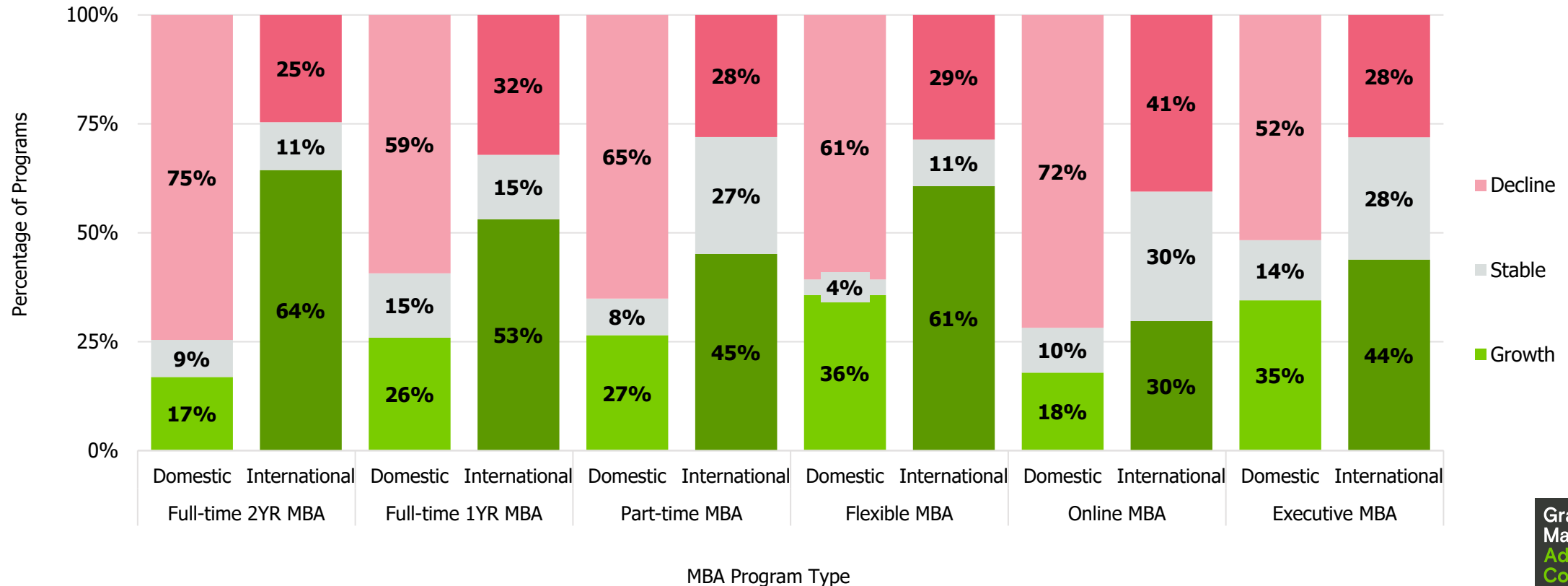
All MBA program types experienced decline in domestic applications in 2022...

Relative Year-on-Year Change in Domestic & International Applications, by MBA Program Type



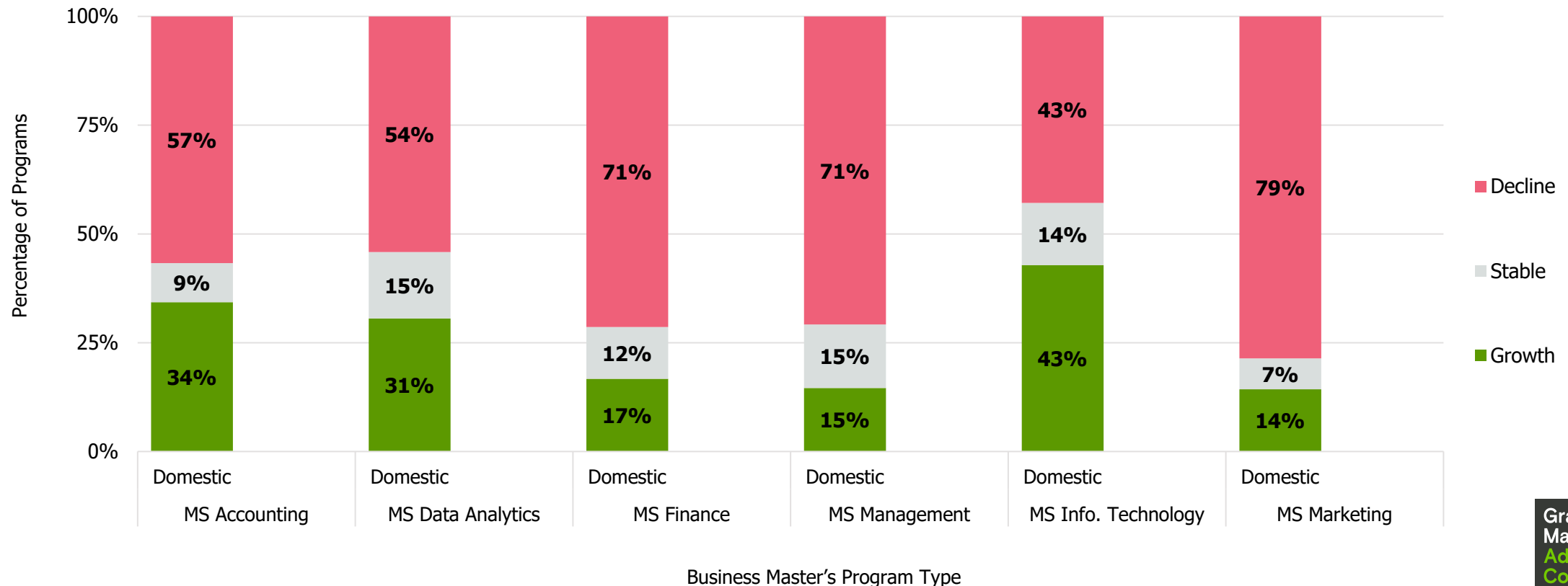
...and growth in international MBA applications in 2022

Relative Year-on-Year Change in Domestic & International Applications, by MBA Program Type



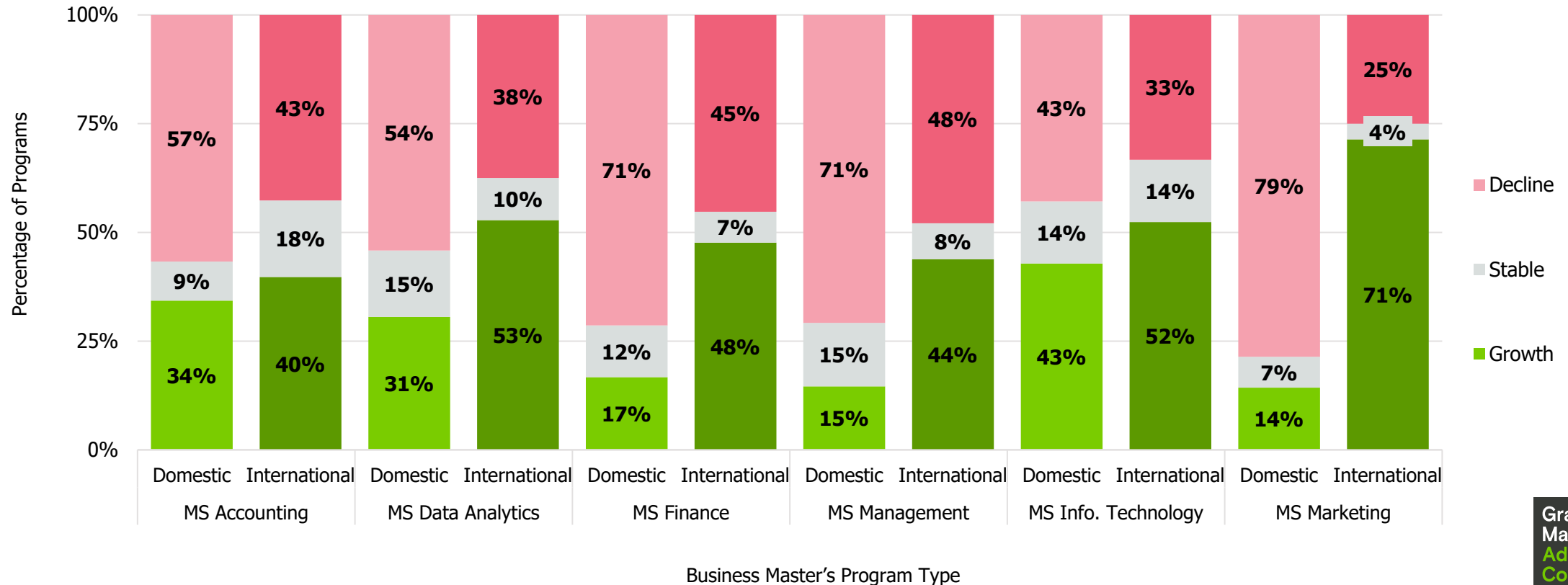
Domestic applications to most Business Master's program types declined in 2022...

Relative Year-on-Year Change in Domestic & International Applications, by Business Master's Program Type



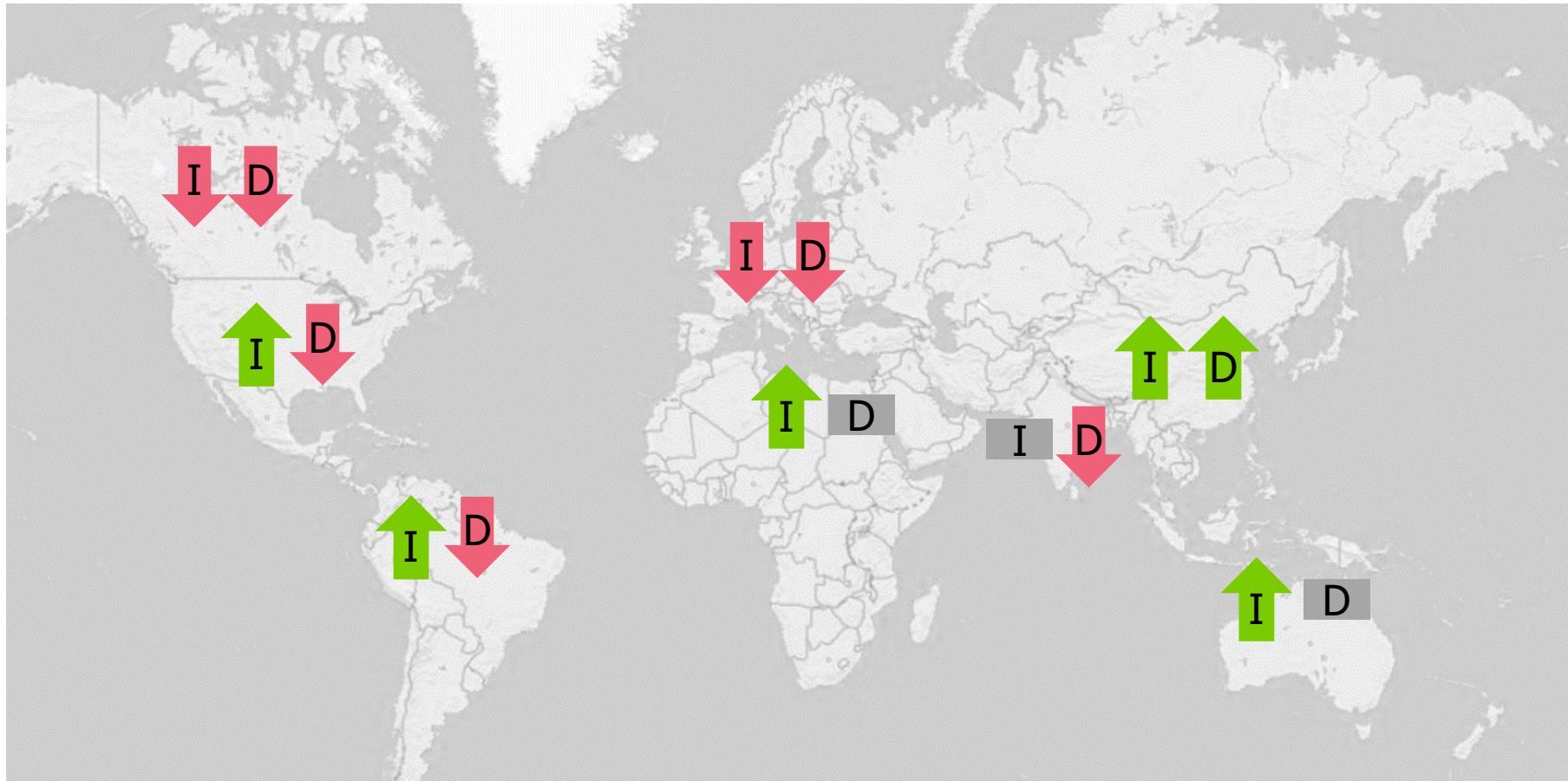
...and growth in international applications to Business Master's programs in 2022

Relative Year-on-Year Change in Domestic & International Applications, by Business Master's Program Type






Global trends in international vs. domestic applications

Relative Year-on-Year Change in Domestic & International Applications, by Program Region



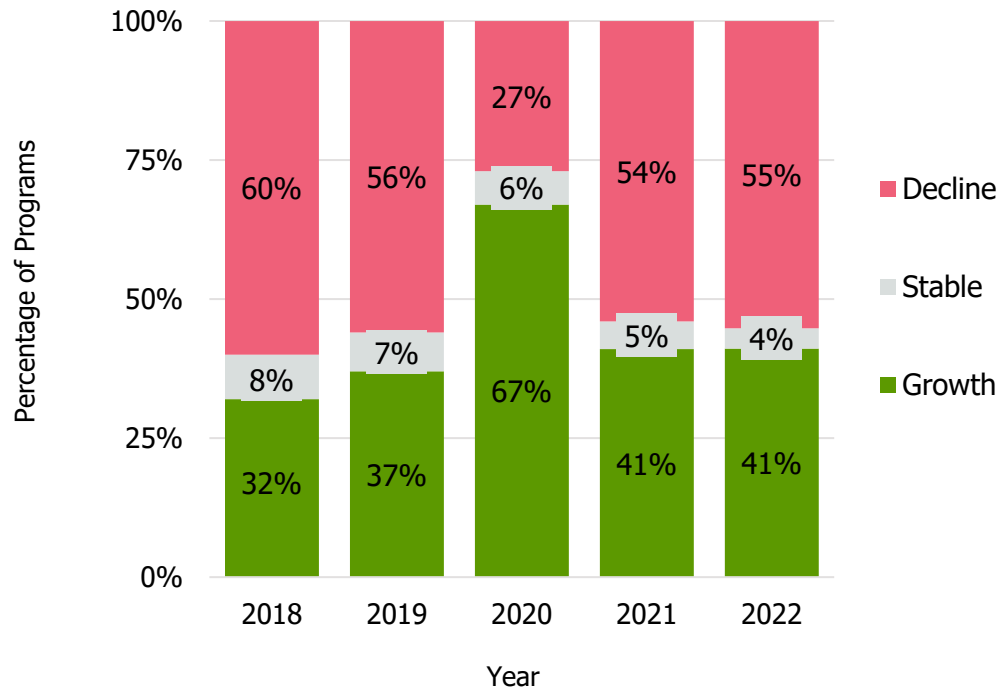
I: International
D: Domestic

Decline 
Growth 
Stable 

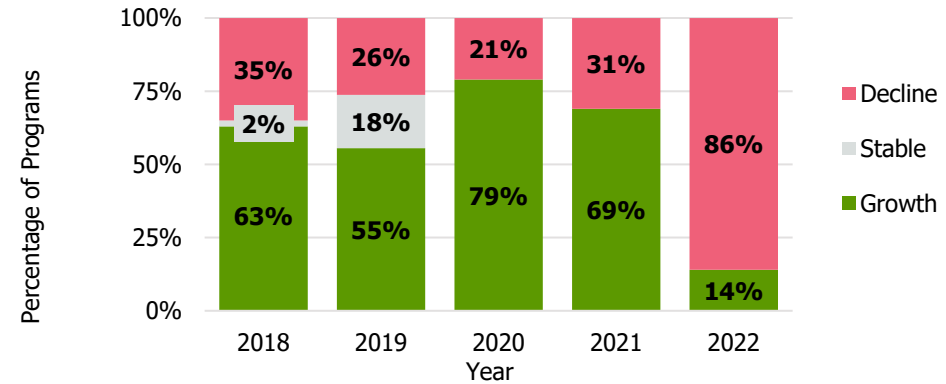
Graduate
Management
Admission
Council™

For internationally aspirant candidates, the US and Europe remain top choices...

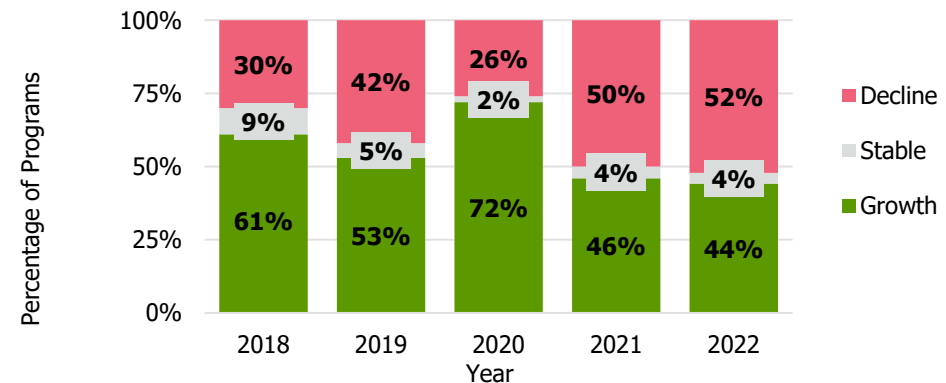
United States - Relative Year-on-Year Change in Total Applications, 2018-2022



Canada - Relative Year-on-Year Change in Total Applications, 2018-2022

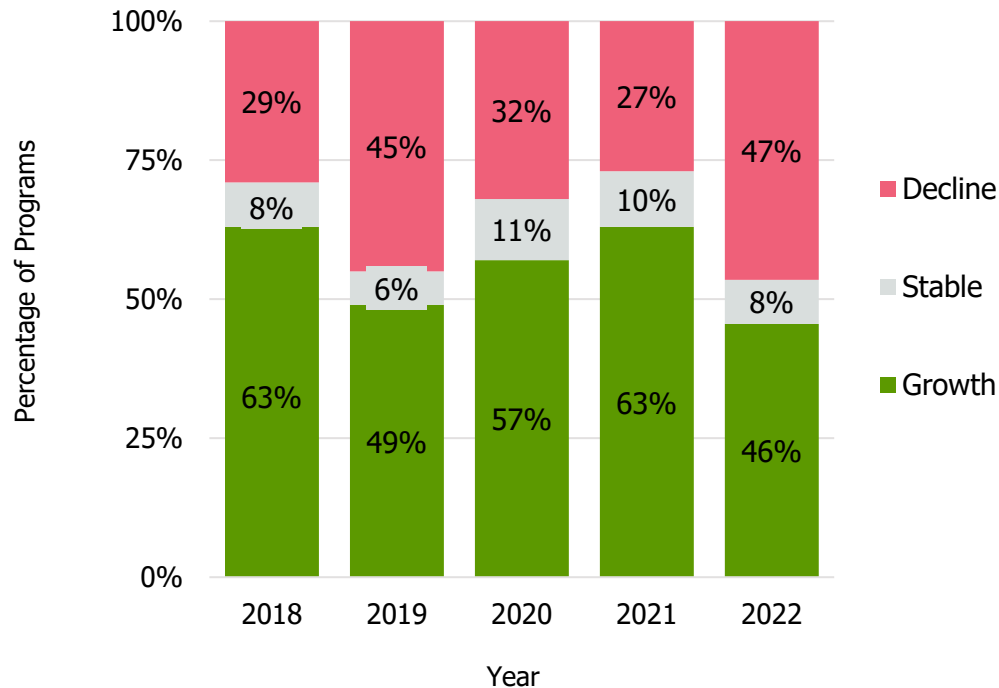


Europe - Relative Year-on-Year Change in Total Applications, 2018-2022

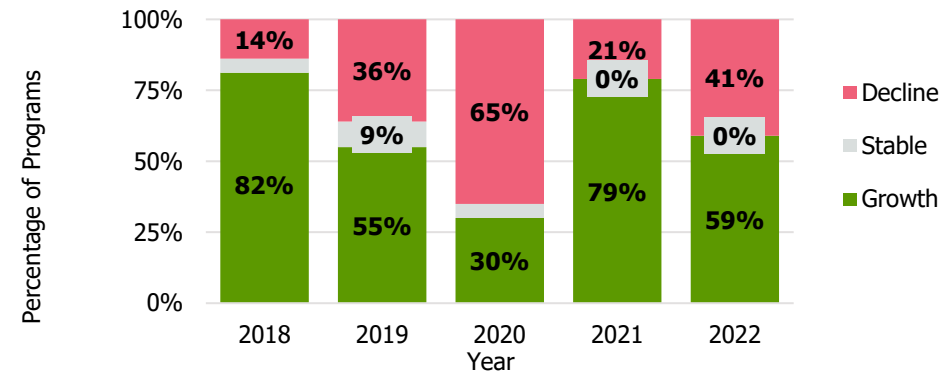


...and this year more than half of Asia-Pacific programs were up or stable in total apps

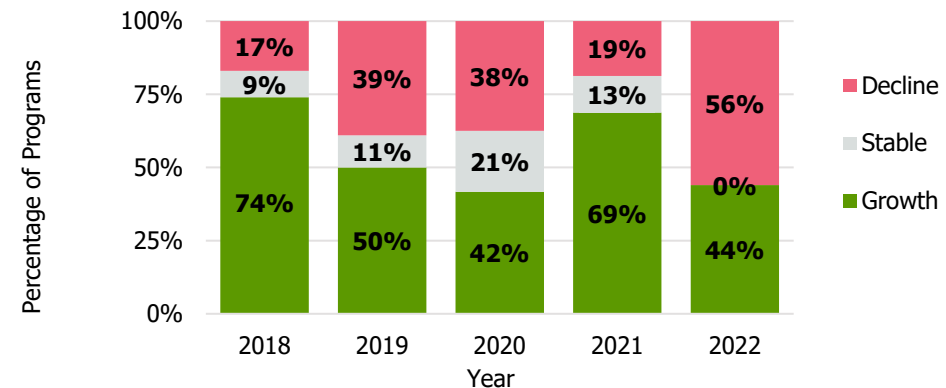
Asia-Pacific Islands - Relative Year-on-Year Change in Total Applications, 2018-2022



Greater China - Relative Year-on-Year Change in Total Applications, 2018-2022

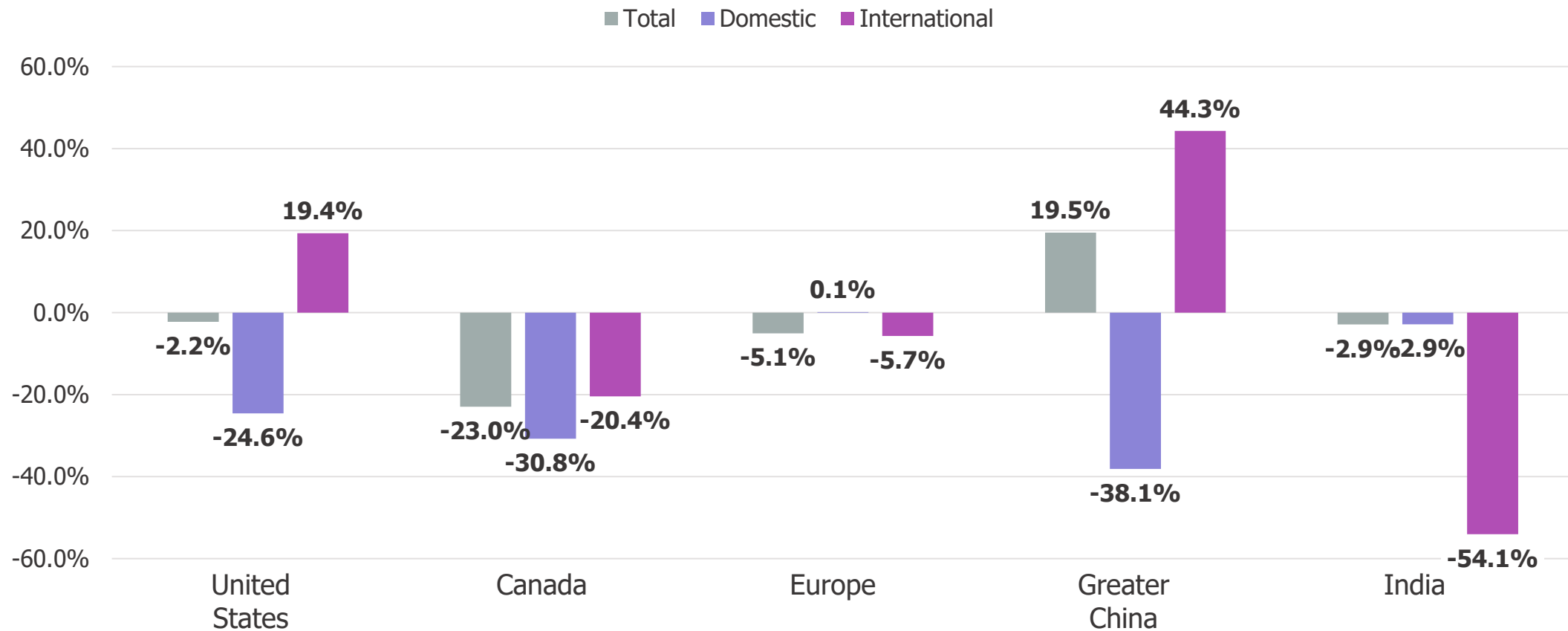


India - Relative Year-on-Year Change in Total Applications, 2018-2022



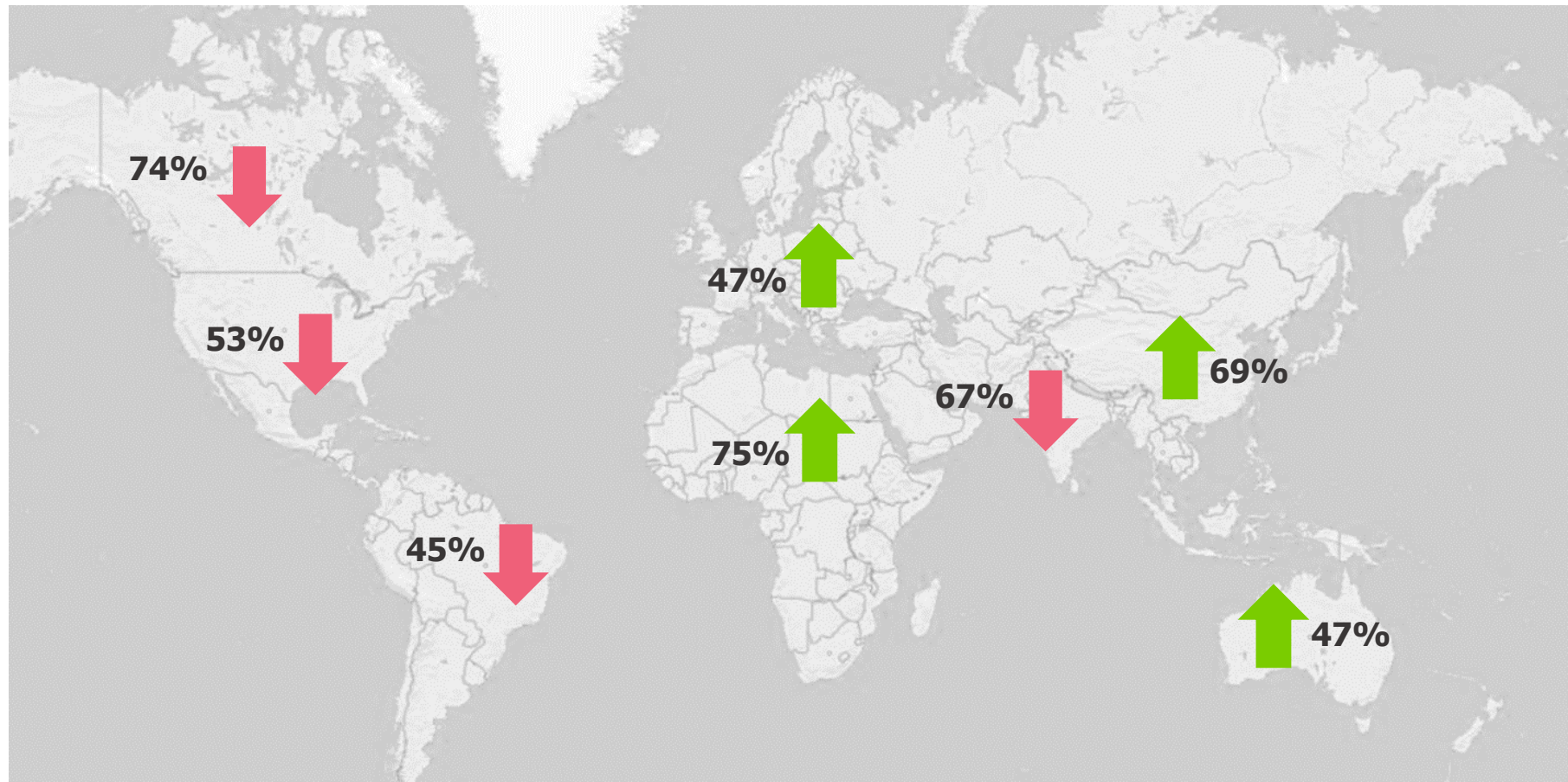
In major markets, international applications roared back as domestic demand receded...

Weighted Absolute Year-on-Year Change in Applications by Applicant Category and Region, 2022



Over half of programs in MEA, APAC, Europe grew or maintained women's representation in applicant pool

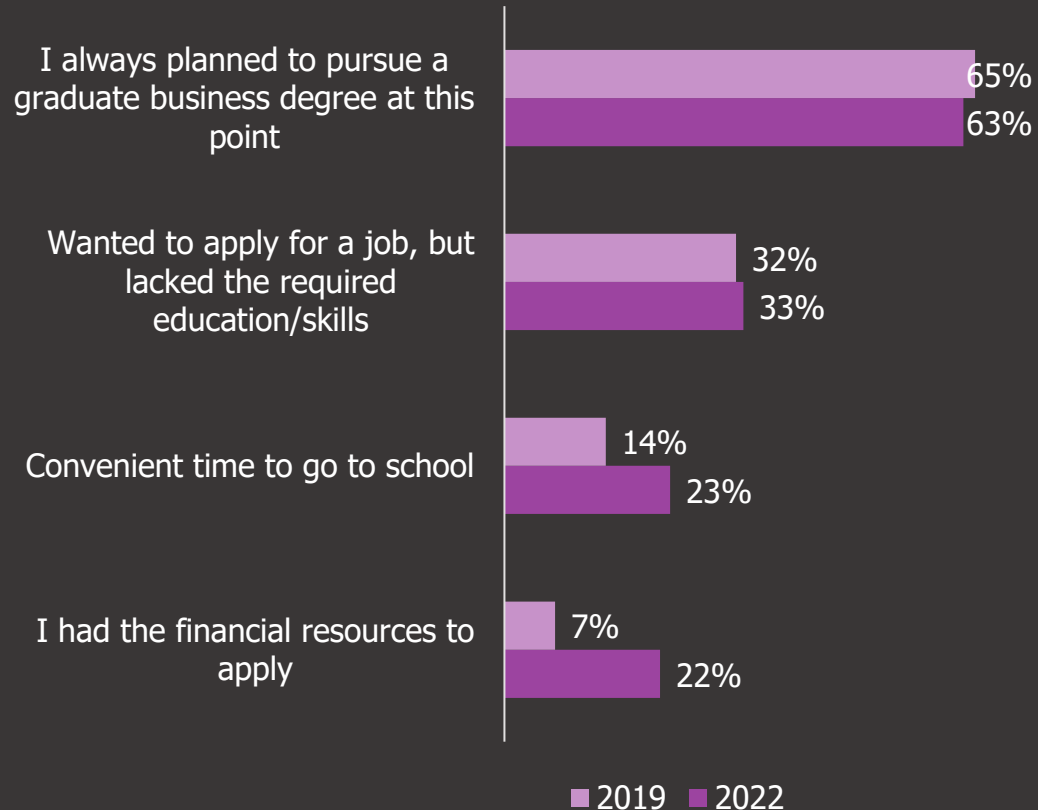
Relative Year-on-Year Change in Women's Applications, by Program Region



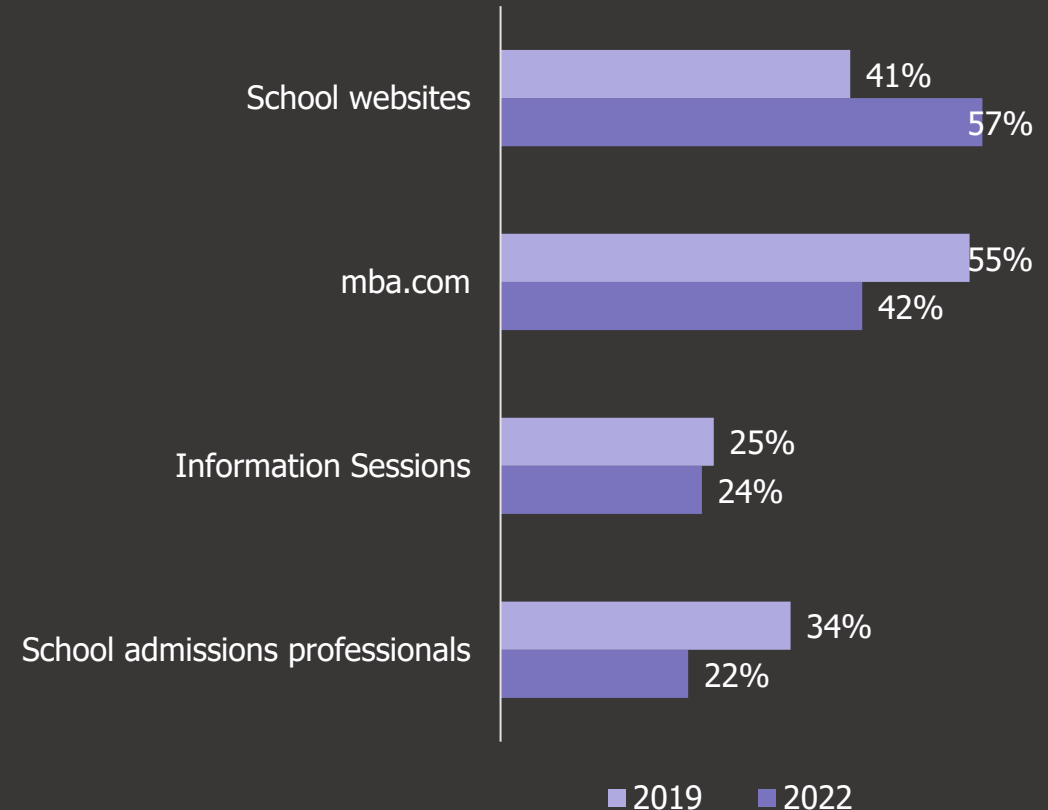
Canada

Canadian Candidate Profile to GME

Motivations Triggering Pursuit



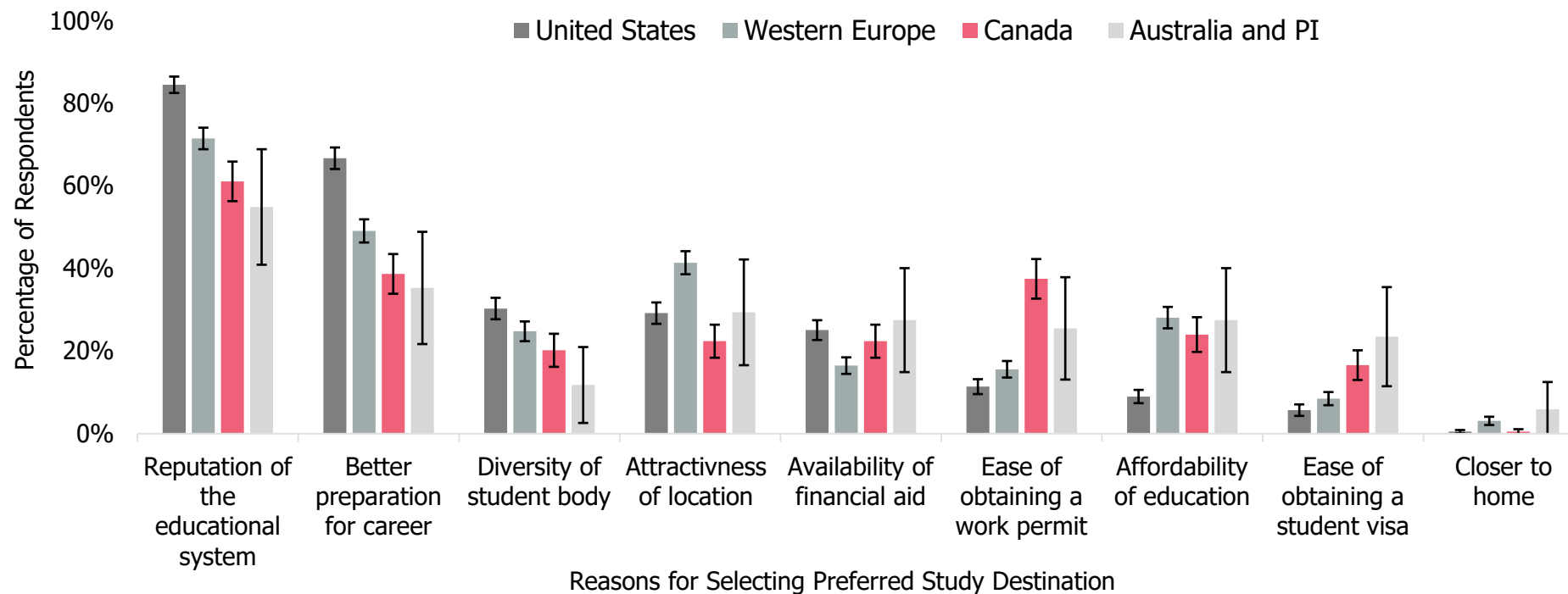
Information Sources Used



Competing for talent in a less mobile market requires differentiation

International Candidates' Reasons for Selecting Their Preferred Study Destination

By preferred study destination

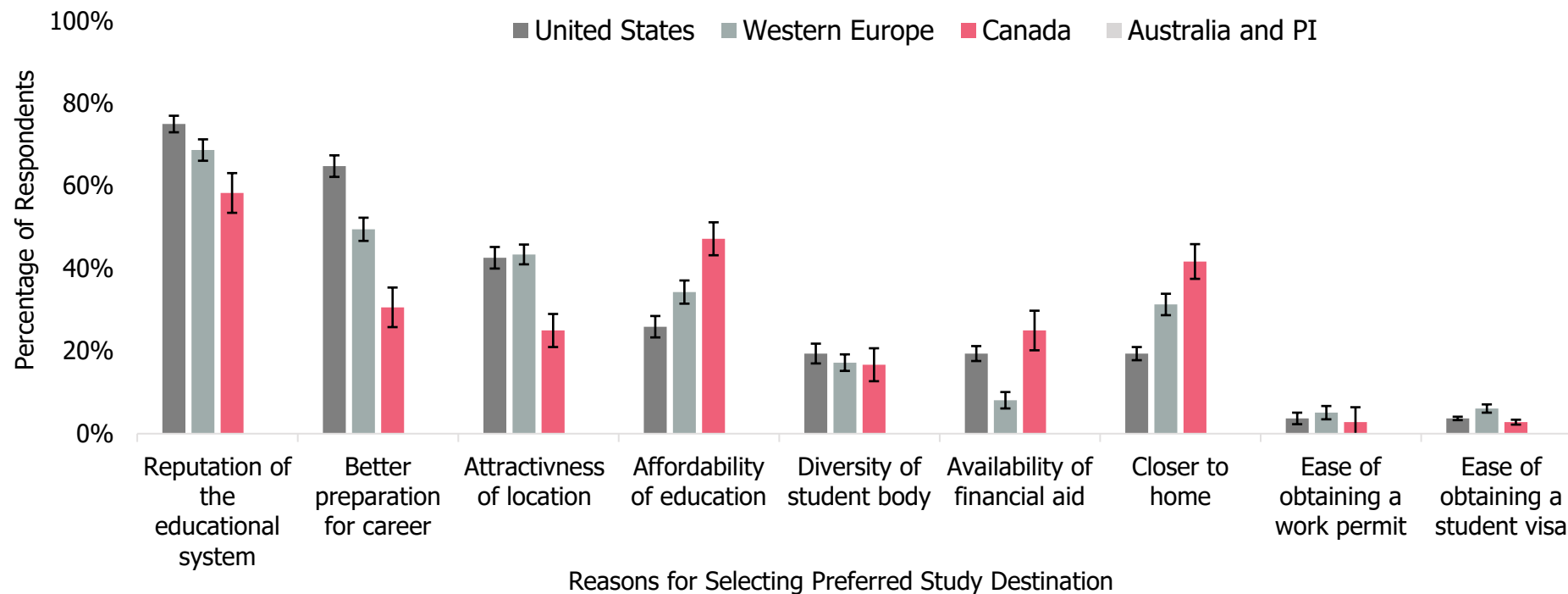


GMAC (2022). GMAC Prospective Students Survey. [gmac.com/prospectivestudents](https://www.gmac.com/prospectivestudents).

Competing for talent in a less mobile market requires differentiation

Domestic Candidates' Reasons for Selecting Their Preferred Study Destination

By preferred study destination



GMAC (2022). GMAC Prospective Students Survey. [gmac.com/prospectivestudents](https://www.gmac.com/prospectivestudents).

Global demand for GME is evolving

Percentage of GMAT exams taken by world region, TY 2013 – TY 2022

North America

TY 2013: 51%
TY 2021: 35% ▼
TY 2022: 28% ▼

Europe

TY 2013: 10%
TY 2021: 14% ▲
TY 2022: 14% ▶

Middle East & Africa

TY 2013: 4%
TY 2021: 4% ▶
TY 2022: 4% ▶

Asia-Pacific

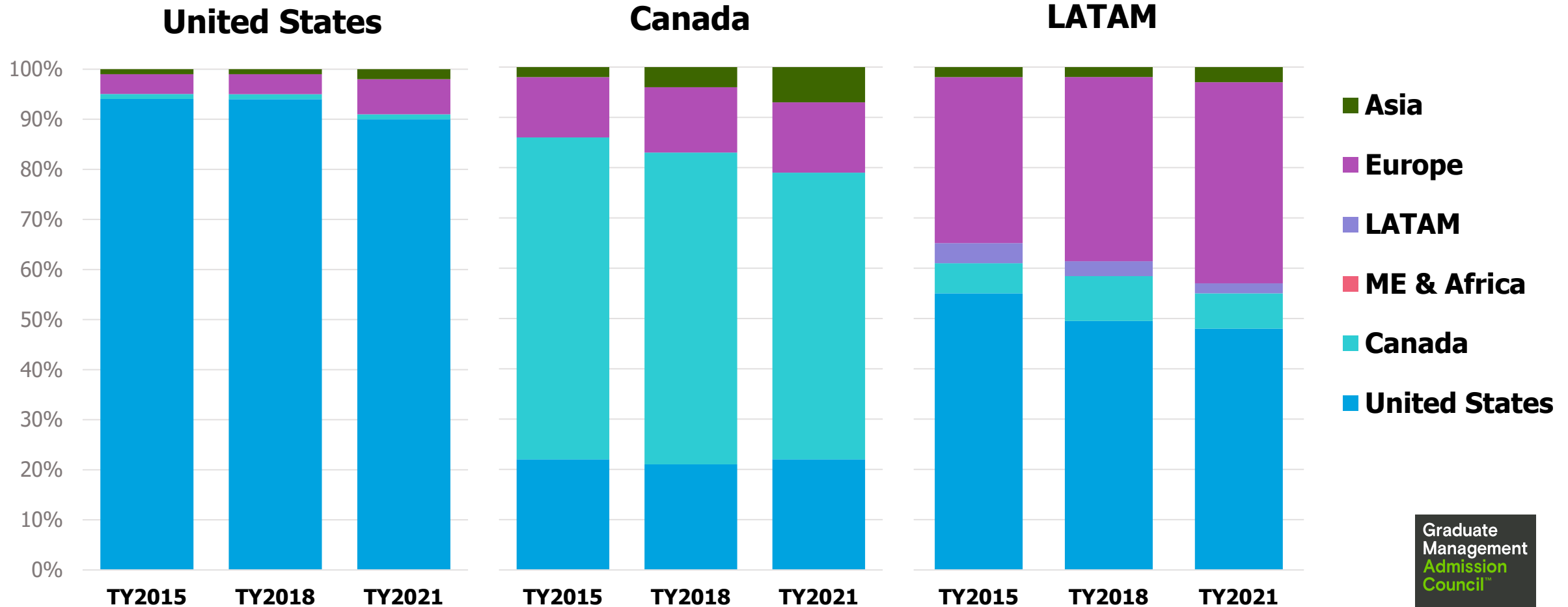
TY 2013: 33%
TY 2021: 44% ▲
TY 2022: 51% ▲

Latin America

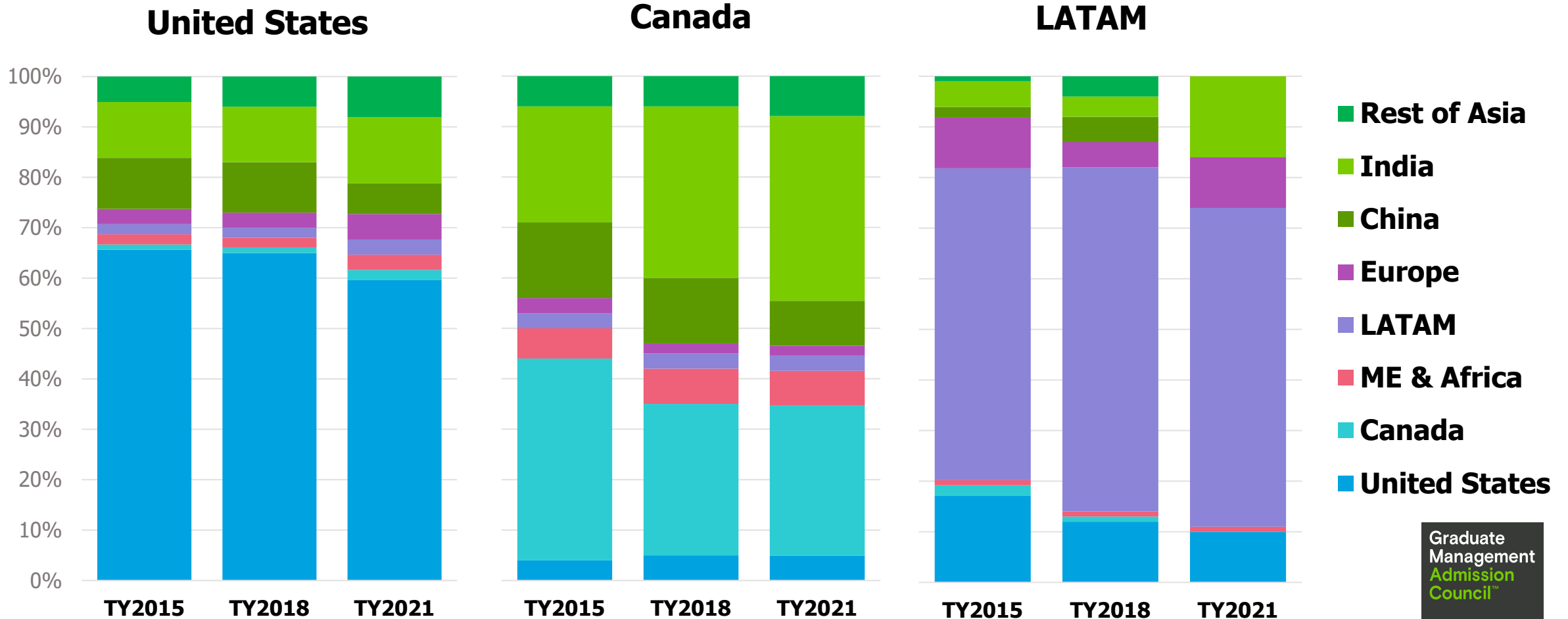
TY 2013: 2%
TY 2021: 3% ▶
TY 2022: 3% ▶

GMAT exam data, TY 2013 – TY 2022

Americas score sending

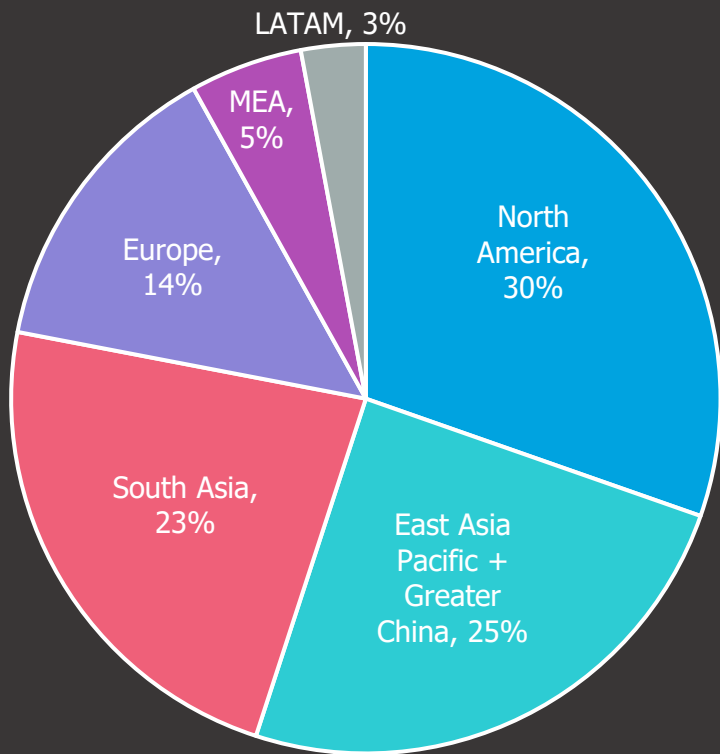


Americas score receiving

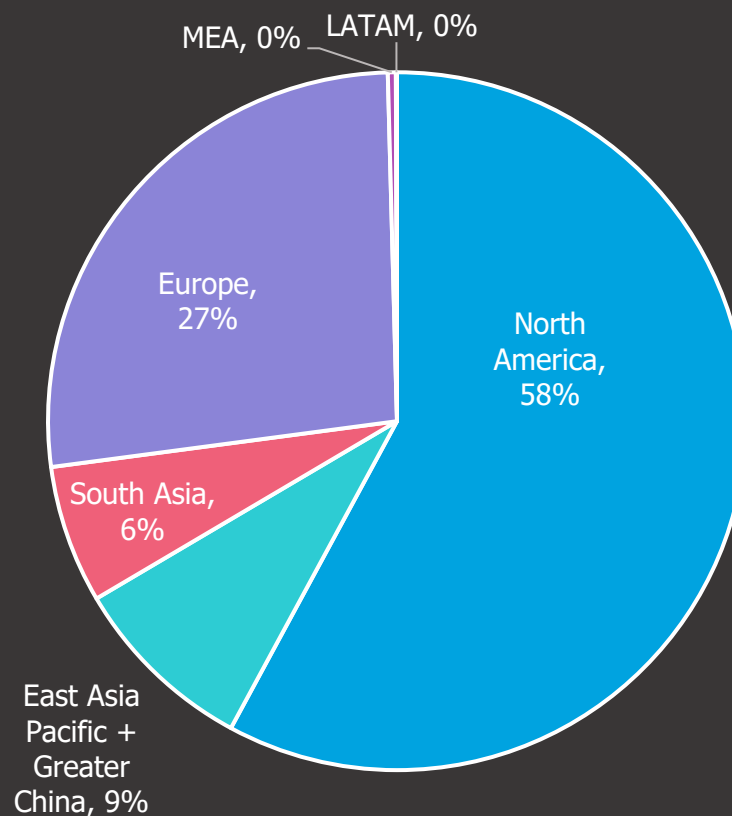


GMAT™ profile: Global reach by geography and programs

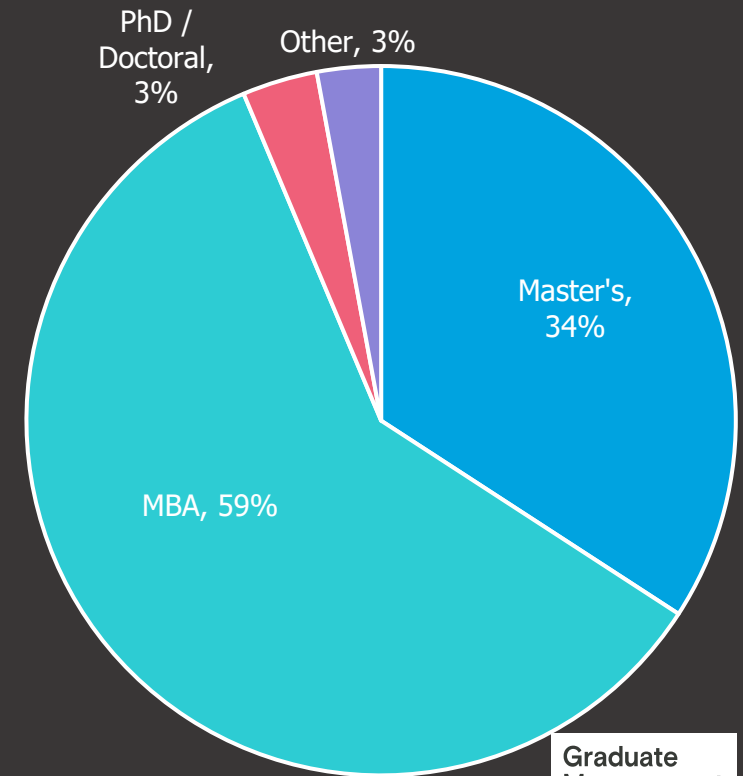
GMAT Unique Tested



GMAT score distribution by program location



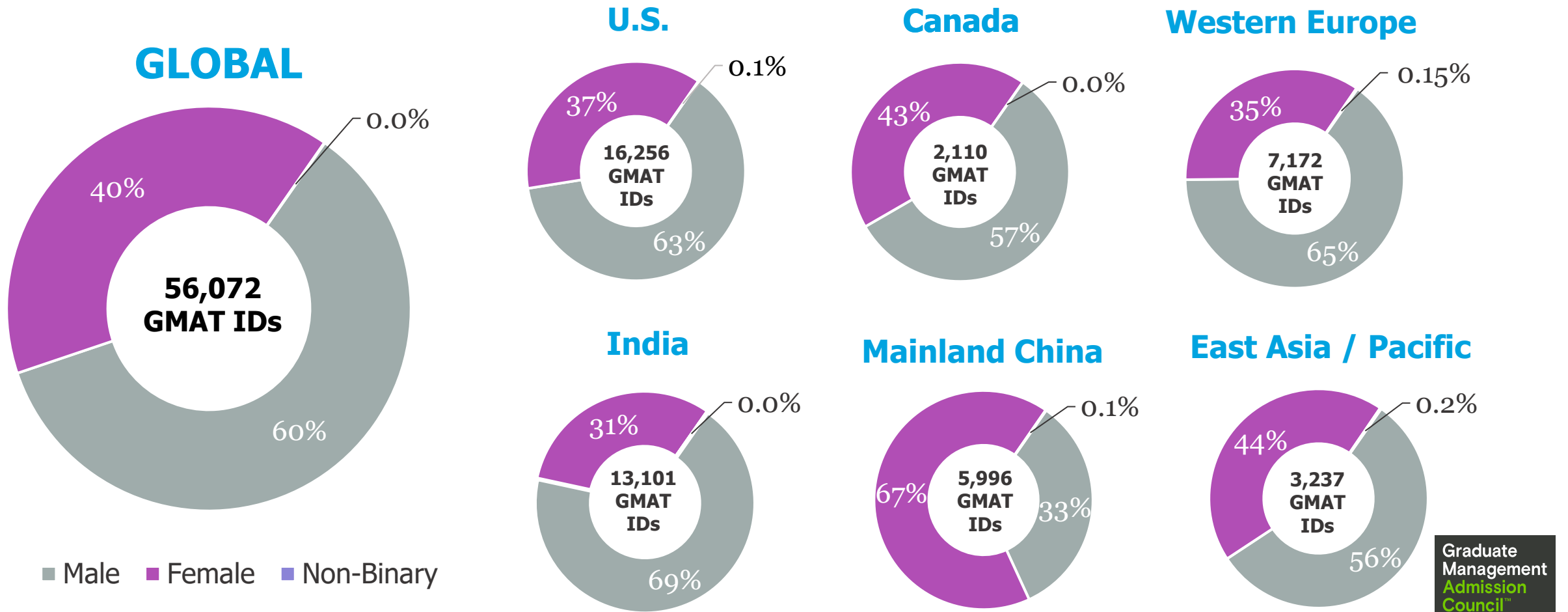
GMAT score distribution by program type



GMAT Testing Year 2022 (1 Jul 2021 - 30 Jun 2022)
 Unique GMAT Test Takers = 93,203 | GMAT Score Reports Sent = 266,290



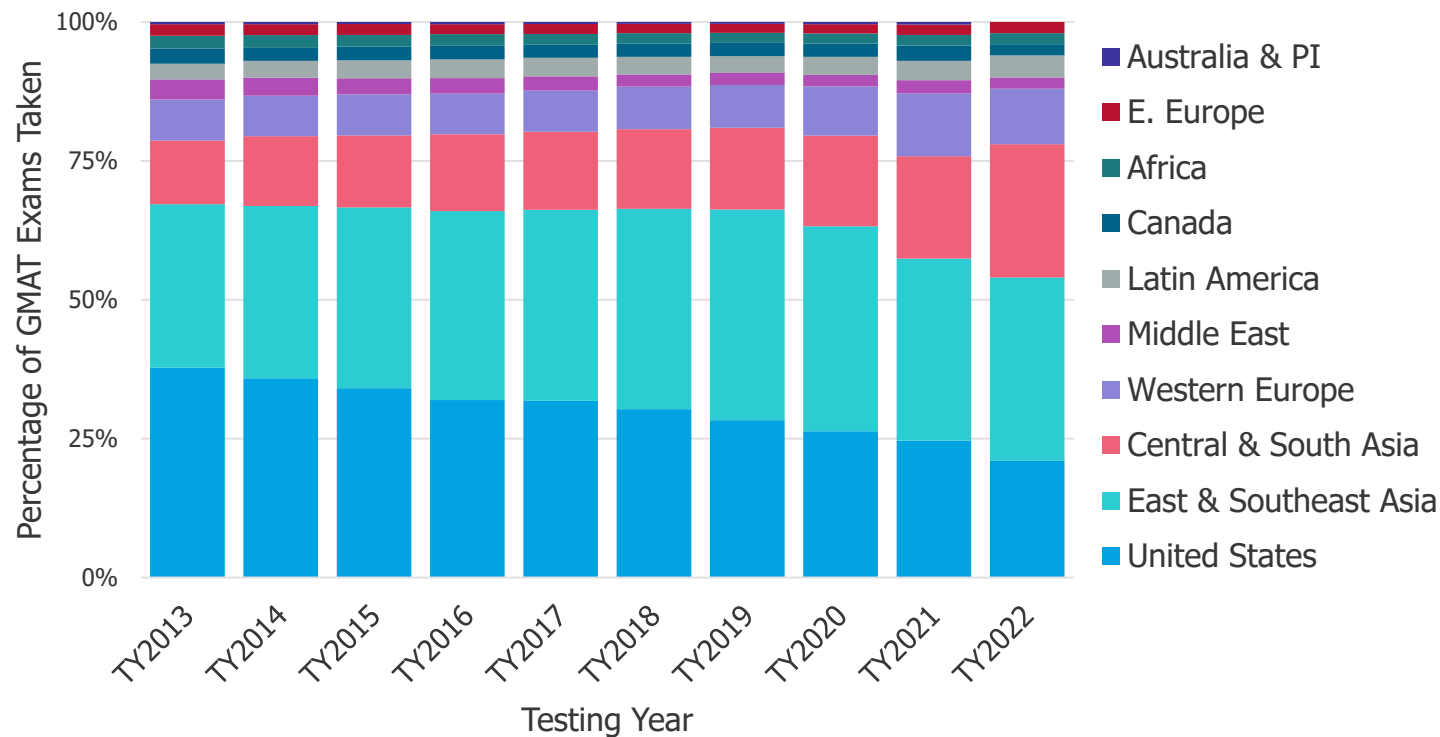
Gender diversity by regions based on the GMAT score senders for all programs



Unique GMAT test-takers who sent score reports in TY 2022.
Location based on the residence reported at the time of GMAT testing.

GMAT test-taker pipeline is diverse and global with regional variations

Percentage of GMAT exams taken by region of citizenship, TY2013-TY2022



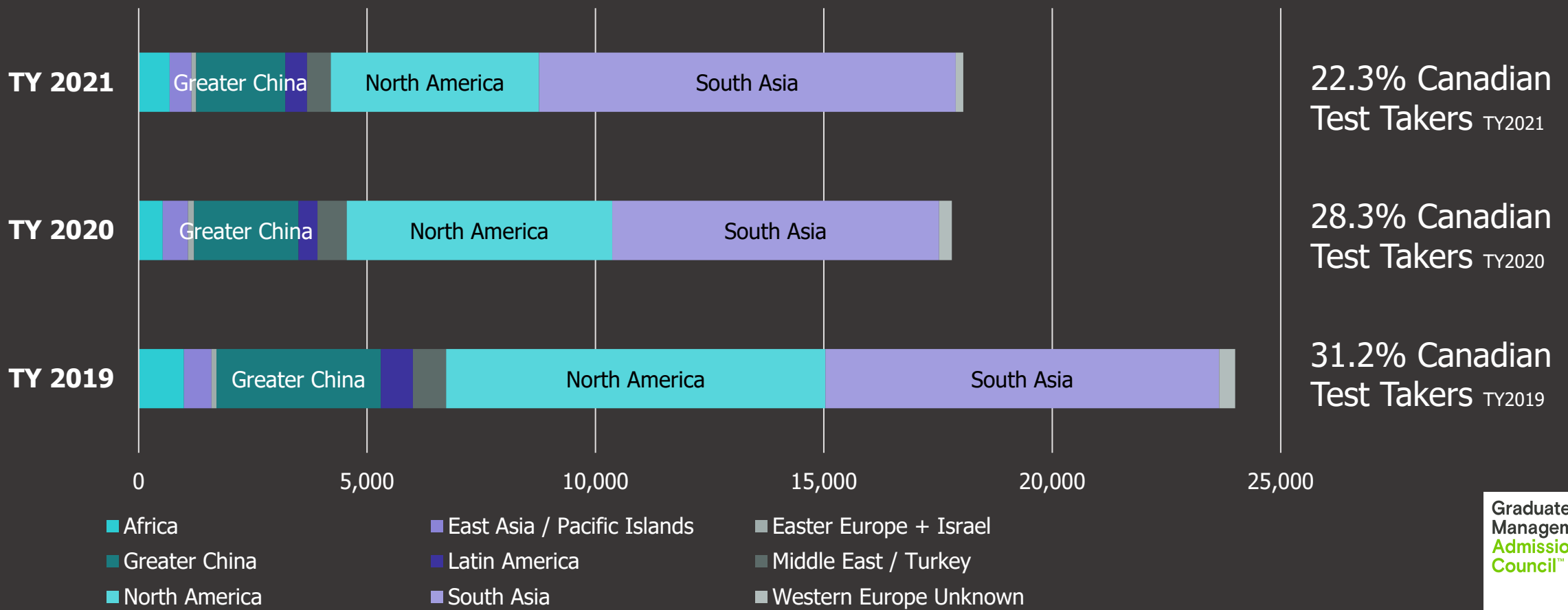
	TY 2013	TY 2022	Abs. Change
Central & South Asia	11%	24%	+13%
East & Southeast Asia	29%	33%	+4%
Western Europe	7%	10%	+3%
United States	38%	21%	-17%

GMAT exam data, TY2013-TY2022. For more, visit www.gmac.com/profile.

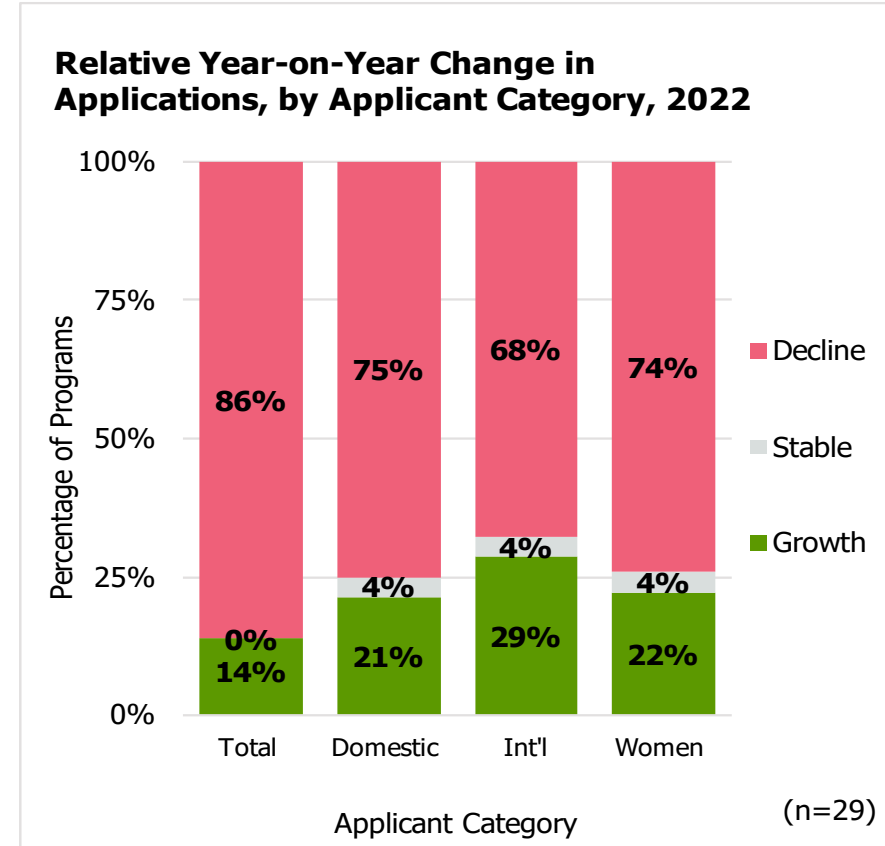
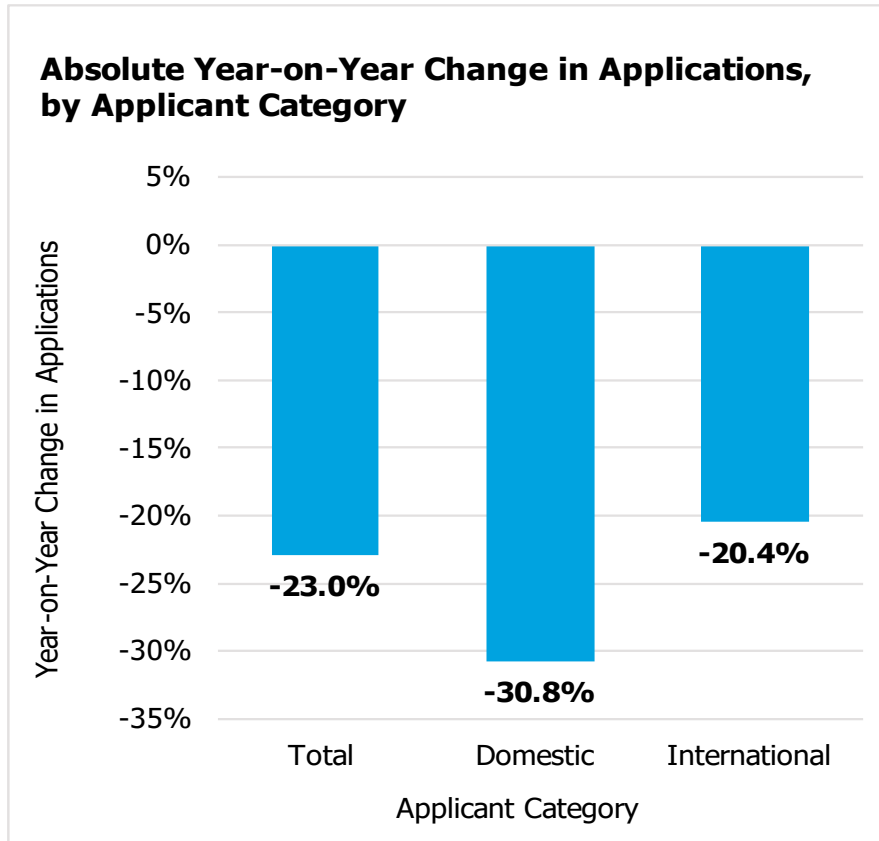


Proportion of candidates sending reports to Canada over three-year period

Total GMAT™ Scores Sent to Canadian Schools by Candidate Location

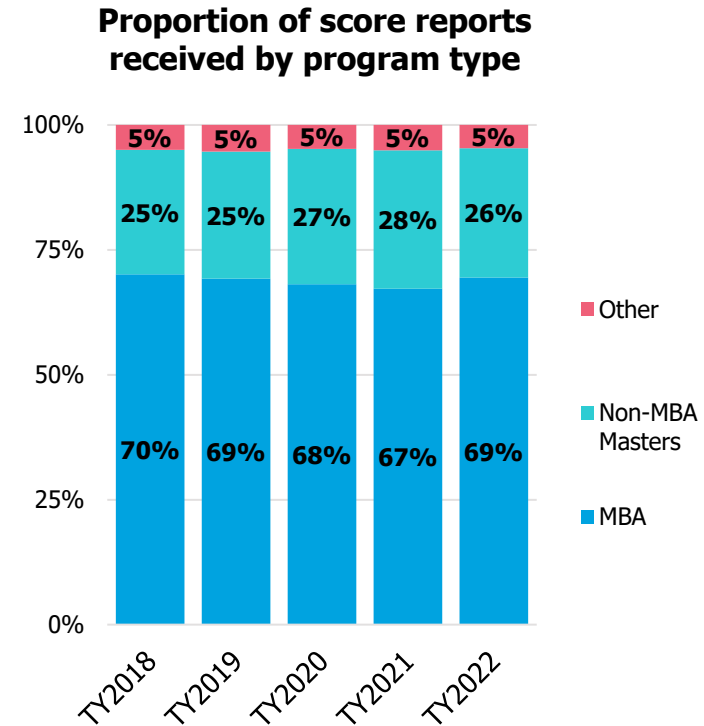
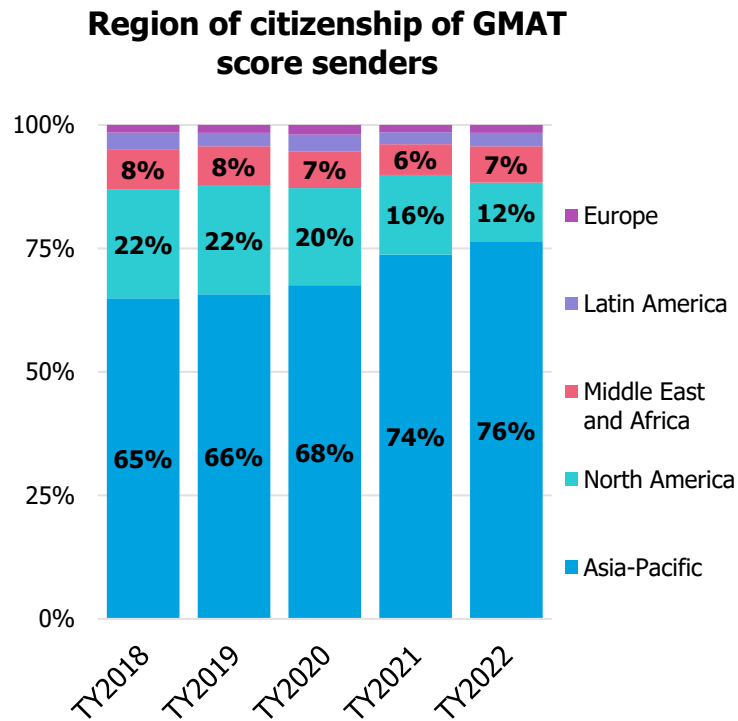


Canadian programs saw significant drops in both domestic and international applications



Spotlight on Canada: Score sending

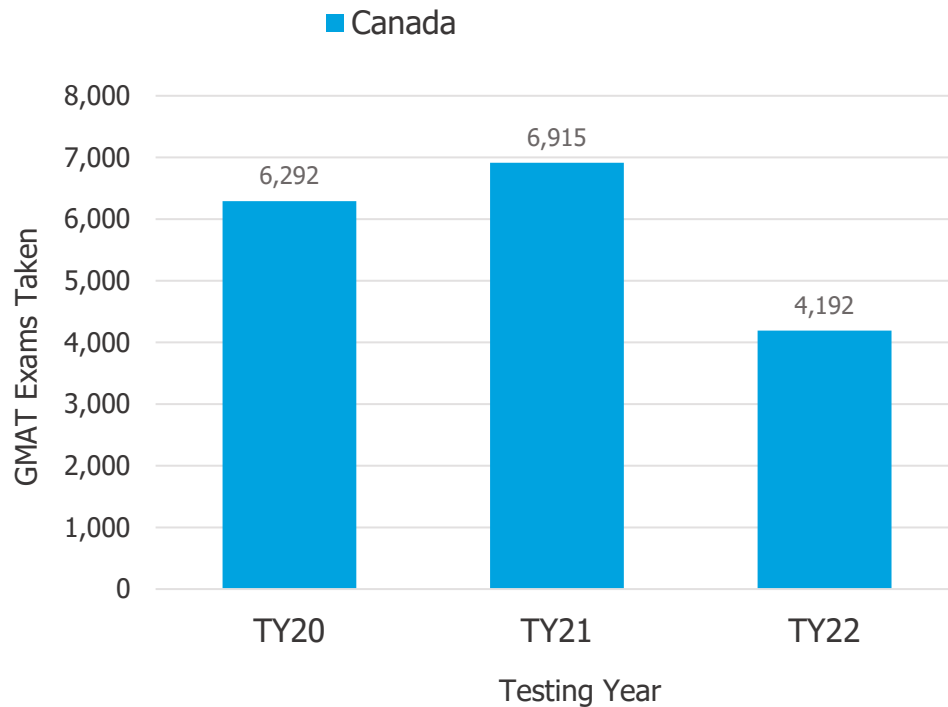
GMAT score reports received by business schools in Canada



GMAT exam data, TY2018-TY2022. For more, visit www.gmac.com/profile.

Spotlight on Canada: Testing volumes

GMAT exams taken by residents of Canada TY 2020 – TY 2022



-33%

% change in GMAT exams taken by residents of Canada from TY 2020 to TY 2022

GMAT exam data, TY2020-TY2022. For more, visit www.gmac.com/profile.

Key themes for the future of GME

- ❑ Expanding the diverse candidate pipeline
- ❑ The new international mobility
- ❑ Controlling costs and preserving the value proposition
- ❑ Acceptance of online programs and/or effective hybrid approaches
- ❑ Maintaining relevance in a rapidly changing business landscape



Resources to Help You Identify and Recruit Talent

As GME markets mature and segment, we can no longer use a uniform approach worldwide but must develop region specific strategies, and points of focus that reflect market needs.

Solutions to enable high-quality enrollment matches



GMAC Assessments

A suite of **VALID, RELIABLE** and **SECURE** assessments that enable a range of GME programs to make admissions decisions that ensure program quality and completion.

COMPLETION

SELECTIVITY

READINESS

Essential Skills

GMAT™

NMAT
by GMAC™

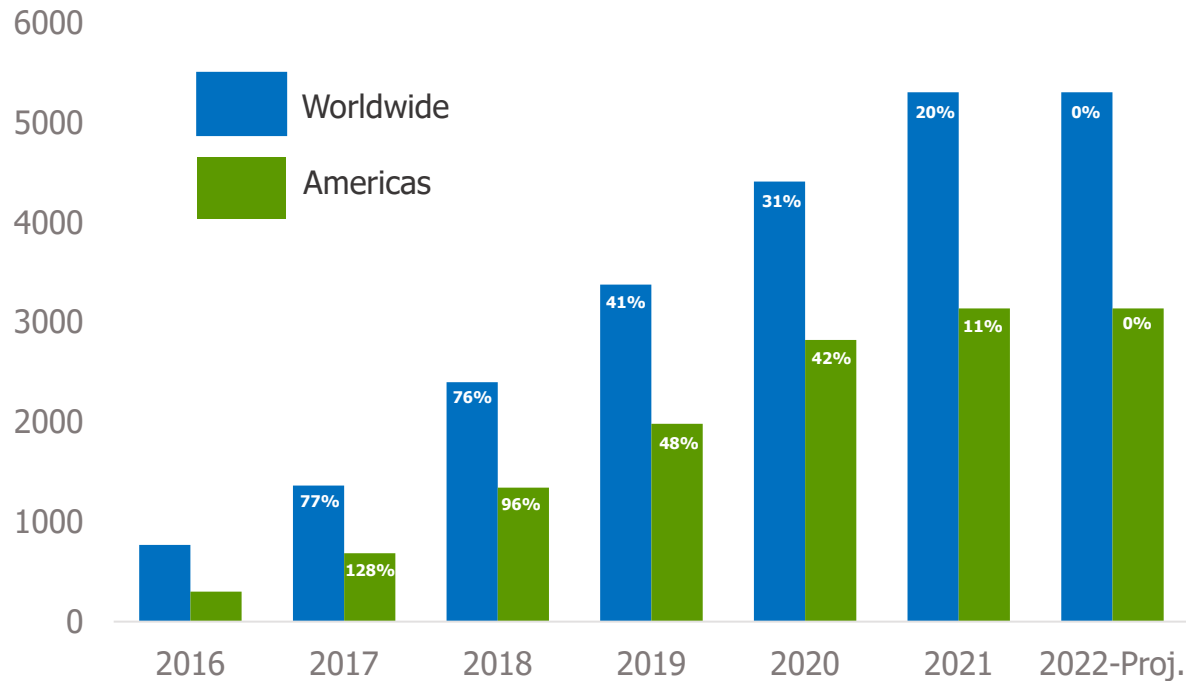
Executive Assessment

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FUNDAMENTALS

Graduate
Management
Admission
Council™

Executive Assessment is an attractive alternative

EA Testing Volume Trend



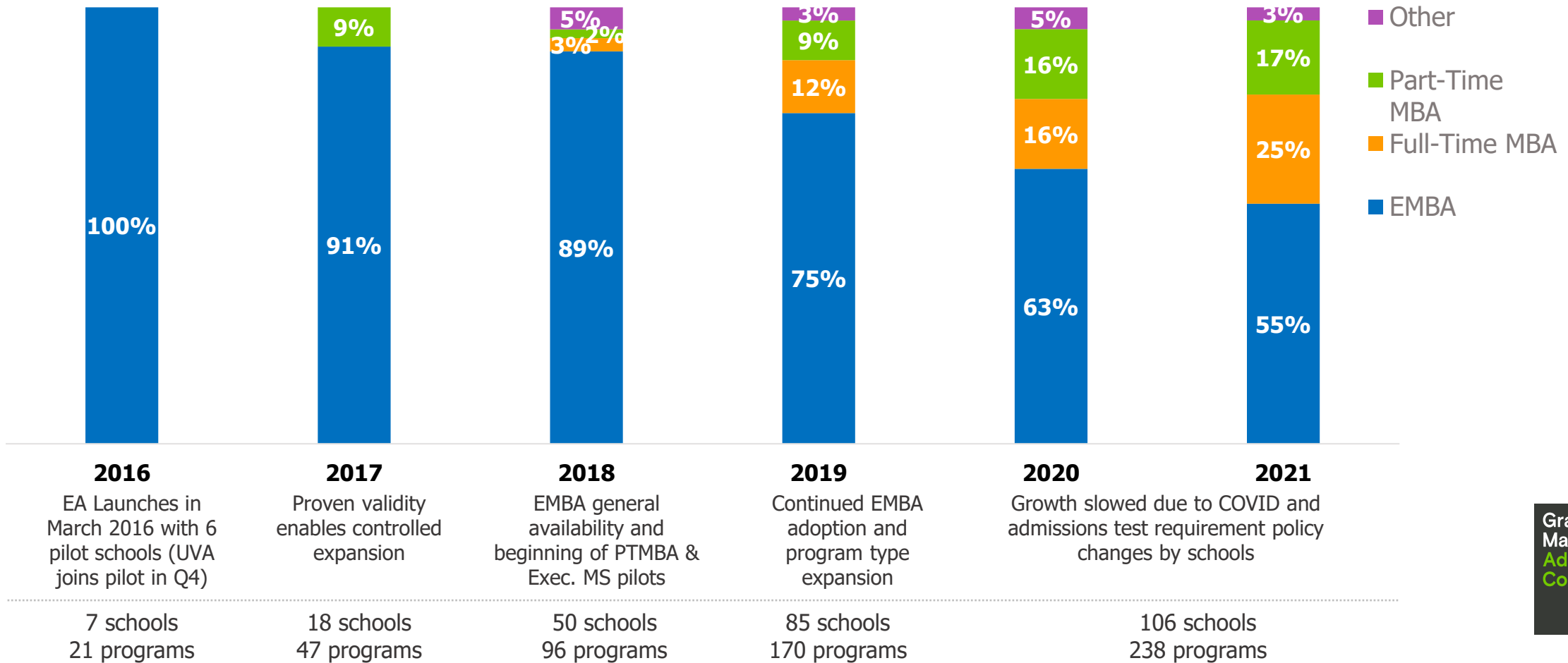
Accepted by
238 Programs at 106 Schools - Worldwide
162 Programs at 69 Schools - Americas

- **Over 75%** said the option to take the EA was a **factor in deciding where to apply**
- Most attractive features of EA
80% referenced **shorter length**
63% referenced **less prep time**

Source: EA Test Taker Candidate Surveys

EA program mix evolves with rapid growth in Part-Time MBA and Full-Time MBA usage

EA Score Reports by Program Type



Executive Assessment Accepting Schools

Americas



Asia / Asia-Pacific / South Asia



Europe



Executive Assessment Accepting Schools

American University in Dubai, American University in Dubai
Asia School of Business, Asia School of Business
Belmont University, Jack C. Massey Graduate School of Business
Binghamton University, School of Business
Boston University, Questrom School of Business
Carnegie Mellon University, Tepper School of Business
Case Western University, Weatherhead School of Management
Chapman University, Argyros School of Business and Economics
China Europe International Business School (CEIBS)
City University of New York - Baruch College, Zicklin School of Business
City, University of London, School of Business
Columbia University, Columbia Business School
Concordia University-Canada, John Molson School of Business
Copenhagen Business School, Copenhagen Business School
Cornell University, Samuel Curtis Johnson Graduate School of Management
Duke University, The Fuqua School of Business
Emory University, Goizueta Business School
Erasmus University, Rotterdam School of Management
ESADE, ESADE Business School
ESMT Berlin
Fordham University, Gabelli School of Business
George Mason University, School of Business
Georgetown University, Graduate School of Arts and Sciences
Georgetown University, McDonough School of Business
Georgia Institute of Technology, Scheller College of Business
Great Lakes Institute of Management, Great Lakes Institute of Management
HEC Paris
IE University, IE Business School
IESE Business School
Imperial College London, Imperial College Business School
INSEAD
Iowa State University, Ivy College of Business
London Business School
Maastricht University, School of Business and Economics
Massachusetts Institute of Technology (MIT), MIT Sloan School of Management
McGill/HEC Montreal, School of Business
Michigan State University, Broad College of Business

Monash University, Monash University
Nanyang Technological University, Nanyang Business School
National University of Singapore, NUS School of Business
New York University, Leonard N. Stern School of Business
Northwestern University, Kellogg School of Management
Oregon State University, College of Business
Portland State University, The School of Business
Quantic, School of Business and Technology
Quantic, Valar Institute
Queens University, Smith School of Business
Reutlingen University, ESB Business School
Rice University, Jesse H. Jones Graduate School of Business
Rutgers-The State University, Rutgers Business School: Newark and New Brunswick
Sabanci University, Sabanci School of Management
Santa Clara University, Leavey School of Business
Seattle University, Alber's School of Business and Economics
Singapore Management University, Lee Kong Chian School of Business
Southern Methodist University, Edwin L. Cox School of Business
SP Jain Institute of Research and Management, School of Business
SP Jain School of Global Management, SP Jain School of Global Management
Stanford University, Stanford School of Business
Tecnologico de Monterrey, EGADE Business School
Texas Christian University, Neeley School of Business
The Ohio State University, The Max M. Fisher College of Business
The University of Amsterdam, Amsterdam Business School
The University of Texas at Austin, McCombs School of Business
Trinity College of Dublin, Trinity Business School
Tsinghua University, School of Economics & Management
Universidade Catolica Portuguesa, Catolica Lisbon School of Business and Economics
Universidade NOVA de Lisboa, Nova School of Business and Economics
University College Dublin, Michael Smurfit Graduate Business School
University of Alberta, Alberta School of Business
University of Calgary, Haskayne School of Business
University of California - Berkeley, Haas School of Business
University of California - Irvine, The Paul Merage School of Business
University of California - Los Angeles, UCLA Anderson School of Management
University of Cambridge, Cambridge Judge Business School

University of Chicago, Booth School of Business
University of Colorado Boulder, Leeds School of Business
University of Hawaii at Manoa, Shidler College of Business
University of Hong Kong, University of Hong Kong Business School
University of Iowa, Tippie College of Business
University of Kansas, School of Business
University of Manchester, Alliance Manchester Business School
University of Michigan - Ann Arbor, Stephen M. Ross School of Business
University of Minnesota - Twin Cities, Carlson School of Management
University of Nevada, Las Vegas, Lee Business School
University of Nevada, Reno, College of Business
University of North Carolina - Chapel Hill, Kenan-Flagler Business School
University of Notre Dame, Mendoza College of Business
University of Oklahoma, Price College of Business
University of Oxford, Saïd Business School
University of Pennsylvania, The Wharton School
University of Pittsburgh, Katz School of Business
University of Rochester, Simon Business School
University of San Diego, University of San Diego School of Business
University of San Francisco, School of Management
University of Southern California, Marshall School of Business
University of Toledo, College of Business and Innovation
University of Victoria, Gustavson School of Business
University of Virginia, Darden School of Business
University of Virginia, McIntire School of Commerce
University of Washington, Foster School of Business
University of Wisconsin-Madison, Wisconsin School of Business
Valparaiso University, College of Business
Vanderbilt University, Owen Graduate School of Management
Villanova University, Villanova School of Business
Vlerick Business School
WHU, Otto Beisheim School of Management
WU - Vienna University of Economics and Business, WU Executive Academy
Yale University, Yale School of Management
York University, Schulich School of Business

Executive Assessment Accepting Programs

Executive MBA

American-Dubai
 Binghamton
 Boston U.
 Case Western Reserve
 CEIBS (3)
 Chapman
 City, U. of London
 Columbia (5)
 Concordia-Canada
 Copenhagen
 Cornell (3)
 CUNY - Baruch (2)
 Duke (2)
 Emory (2)
 Erasmus (2)
 ESADE (2)
 ESMT-Berlin
 Fordham
 Georgetown
 Great Lakes
 HEC Paris
 IE
 IESE (5)
 Imperial College London
 INSEAD (3)
 LBS (4)
 McGill-HEC Montreal

MIT
 Monash
 Northwestern
 NYU
 Ohio State
 Quantic
 Queens
 Rice
 Rutgers
 Sabanci
 Santa Clara
 Seattle
 Singapore Management
 Southern Methodist
 S.P. Jain School of Global Mgmt.
 Tecnologico de Monterrey (2)
 Texas Christian
 Trinity College of Dublin
 Tsinghua
 U. College Dublin (2)
 U. Alberta
 U. Calgary
 U. California-Berkeley
 U. California-Irvine
 U. California-Los Angeles
 U. Cambridge
 U. Catolica Portuguesa

U. Chicago (3)
 U. Colorado-Boulder
 U. Hawaii at Manoa
 U. Hong Kong
 U. Iowa
 U. Minnesota-Twin Cities
 U. Nevada, Las Vegas
 U. Nevada, Reno
 U. North Carolina-Chapel Hill
 U. Notre Dame (2)
 U. NOVA de Lisboa
 U. Oxford
 U. Pennsylvania (2)
 U. San Francisco
 U. Texas-Austin
 U. Toledo
 U. Virginia-Darden (2)
 U. Washington (2)
 U. Wisconsin-Madison
 Vanderbilt (2)
 Villanova
 Vlerick
 WHU
 WU - Vienna (2)
 Yale
 York

PT MBA

Asia School of Business
 Belmont (2)
 Carnegie Mellon
 Case Western Reserve
 CUNY-Baruch
 Emory
 Fordham
 George Mason
 Georgetown
 Georgia Inst. Tech.
 Iowa State
 Maastricht
 Nanyang Technological
 Northwestern
 NUS
 NYU
 Ohio State
 Oregon State
 Portland State
 Rice
 Rutgers
 Sabanci
 Southern Methodist
 Tecnologico de Monterrey (3)
 Texas Christian (3)
 U. Amsterdam
 U. California-Berkeley
 U. California-Los Angeles
 U. Chicago (2)
 U. Manchester
 U. Michigan
 U. Minnesota-Twin Cities
 U. Nevada, Reno
 U. Oklahoma
 U. Pittsburgh
 U. San Diego
 U. Texas-Austin
 U. Victoria
 U. Virginia
 U. Washington (2)
 U. Wisconsin-Madison
 Valparaiso
 WU-Vienna

Non-MBA Masters & PhD/Doctoral

Belmont
 CUNY Baruch (10)
 Duke (3)
 Georgetown-Arts & Sciences
 Georgetown-McDonough
 INSEAD
 LBS
 MIT
 NYU
 Sabanci
 SP Jain Institute
 Stanford
 Tecnologico de Monterrey (5)
 Texas Christian
 U. Amsterdam
 U. Toledo
 U. Virginia-Darden
 U. Virginia-McIntire

FT MBA

Belmont
 Carnegie Mellon
 Case Western Reserve
 Columbia
 CUNY-Baruch
 Duke (2)
 Fordham
 Georgetown
 Michigan State
 NYU (3)
 Reutlingen
 Rice
 Rutgers
 Southern Methodist (2)
 Tecnologico de Monterrey
 U. Amsterdam
 U. Rochester
 U. Texas-Austin
 U. Toledo
 U. Virginia
 Valparaiso
 Vanderbilt

Online MBA

Carnegie Mellon
 Imperial College London
 Oregon State
 Quantic
 Rice
 Southern Methodist
 Tecnologico de Monterrey
 U. Kansas
 U. Manchester
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 U. Minnesota - Twin Cities
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NOTE: () indicates the number of programs

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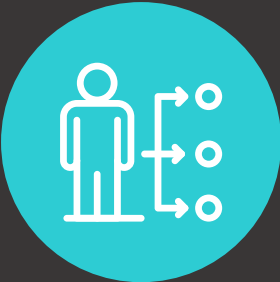
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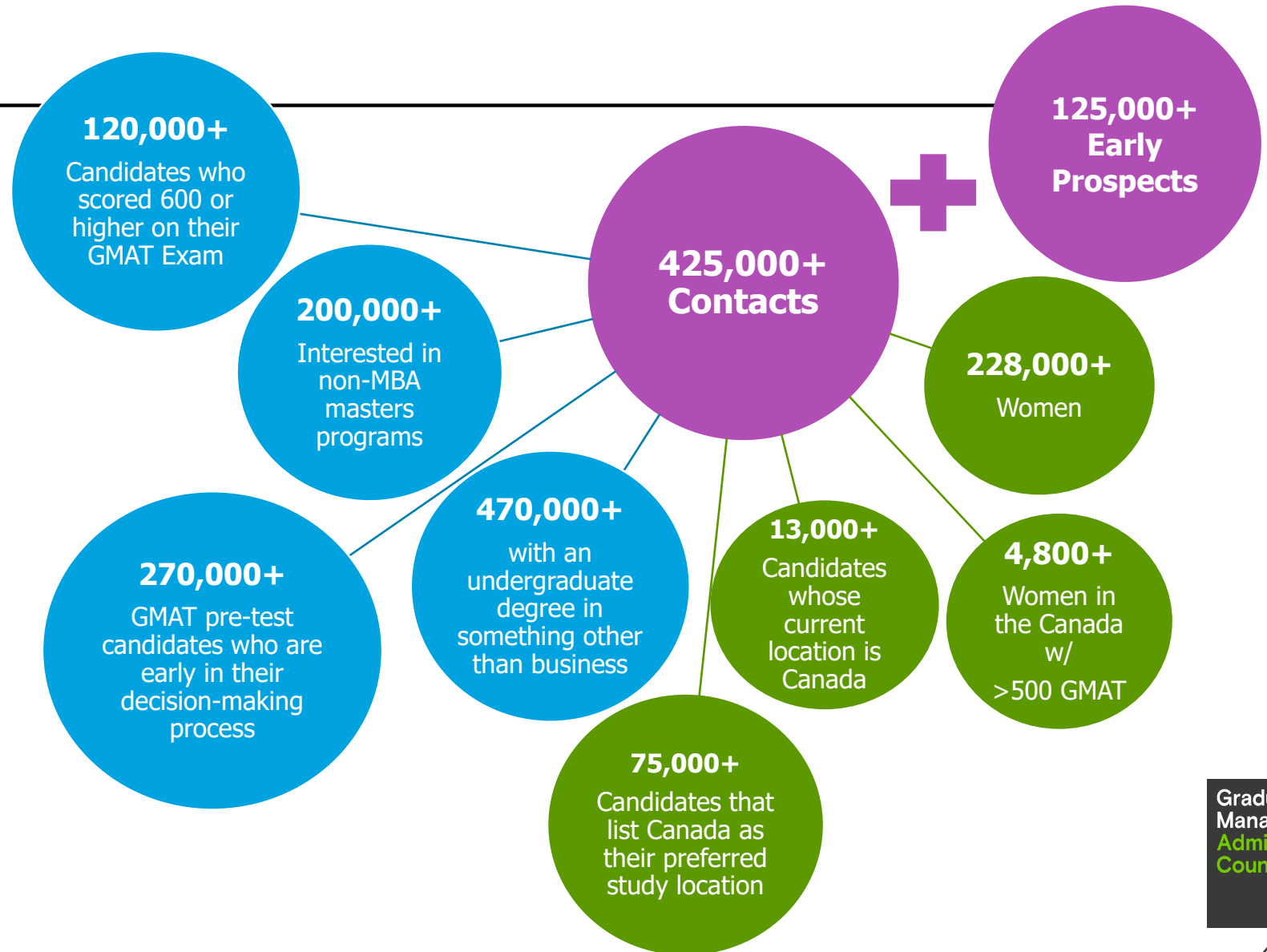
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University of Calgary, Haskayne School of Business

DISPLAYING 1 - 6 RESULTS OF 6

SCHOOL PROGRAM PROGRAM DETAILS EXAM INFORMATION

University of Calgary Haskayne School of Business	PhD Program 2500 University Drive NW, Calgary, Alberta, Canada	Full-time More than 2 years	
University of Calgary Haskayne School of Business	MBA Thesis 2500 University Drive NW, Calgary, Alberta, Canada	Full-time 2 years	

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EVENT	HOST AND LOCATION	ABOUT
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Virtual MBA Information Session March 24, 2022 Registration Required SAVE	University of Sydney, Business School	Join us for a virtual MBA Information Session and Taster Class with Professor Guy Ford, MBA Director, and learn about our full-time MBA. Taught over 18 months in deliberately small class sizes our full-time MBA will develop your personal skills... more
Temple University Full Time MBA Virtual Session March 24, 2022 Registration Required SAVE	Temple University, Fox School of Business	Join Associate Director of Graduate Admissions, Jenn Houder, to learn more about the Full-Time MBA program. This virtual information session will cover the program structure, career resources, global opportunities, as well as the application... more

A penny for your thoughts...

Thank You

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Senior Manager, Market Development, Americas

E: kburns@gmac.com



Thank You

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