

Candidate Mobility – programs and geographies

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*Director, Market Development, Americas
Graduate Management Admission Council*



Who is GMAC?

A Council

of leading schools
with an expertise in

Admissions

Which has

Global connections

Breadth of Knowledge

Prestigious heritage

Allowing

Students

with a means to

Stand out

and be recognized

And providing

Schools

with

Data, Insights

and a place for

Collaboration

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

Purpose

**To ensure talent
never goes undiscovered**

Candidate dynamics

35%

The number of international applicants to North American non-MBA (specialized master's programs) 10 years ago

57%

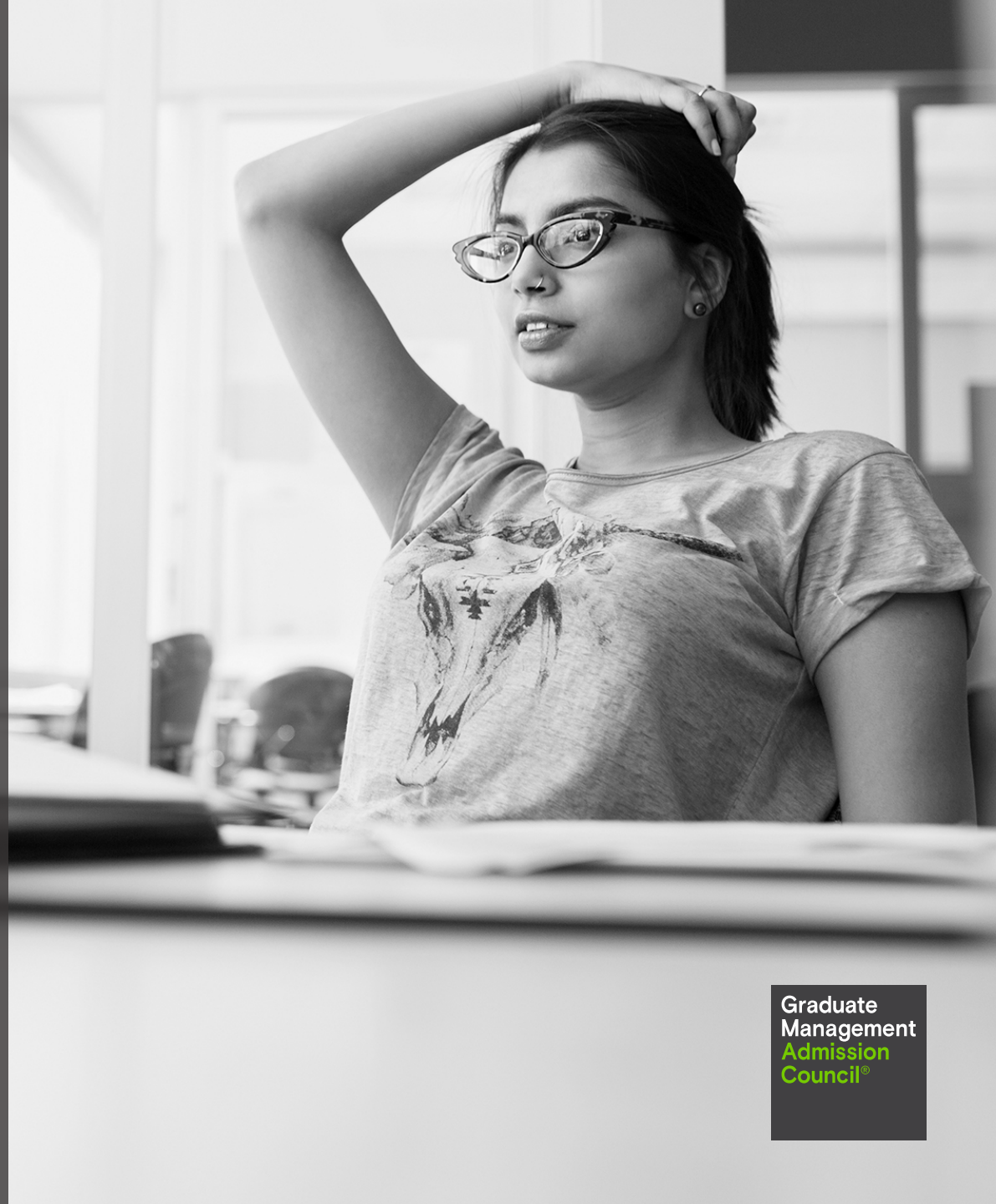
The number of international applicants to North America non-MBA (specialized master's programs) in 2016

33%

The average number of international applicants to all North American programs 10 years ago

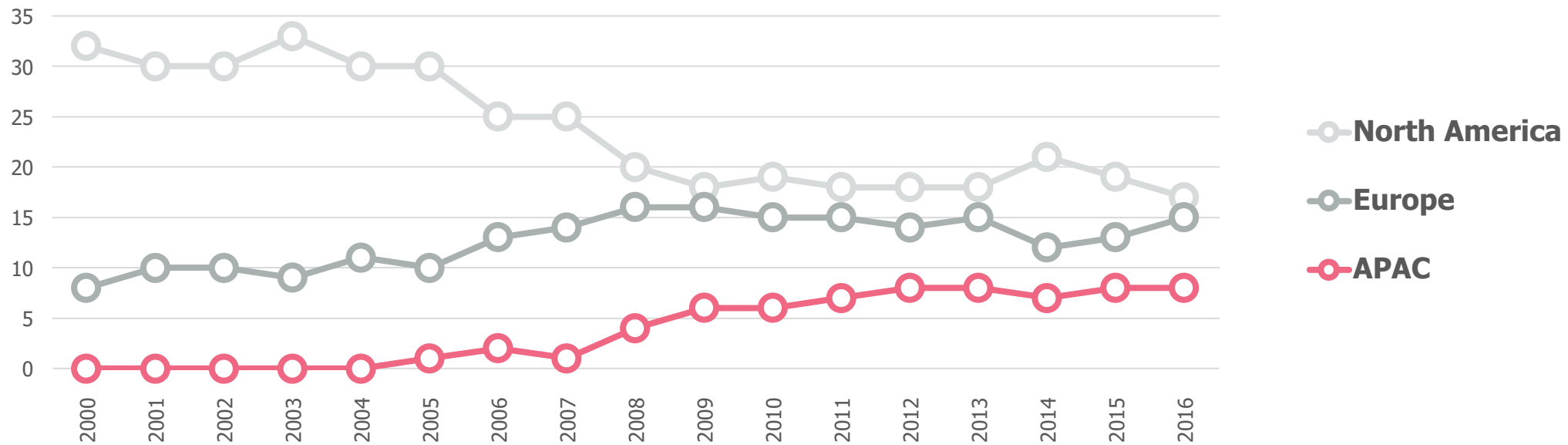
41%

The average number of international applicants to all North American programs in 2016

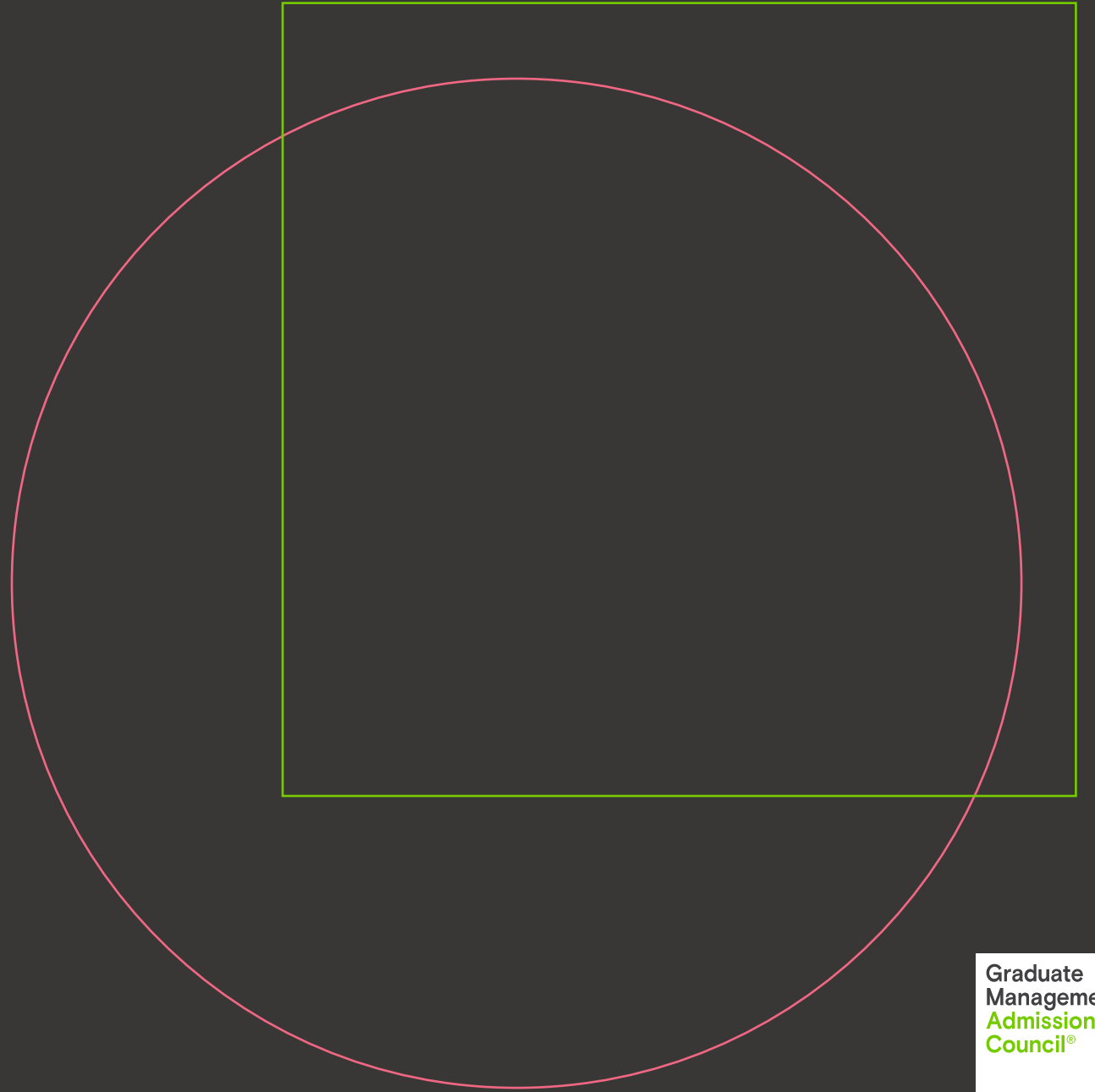


School dynamics

Number of MBA programs in FT Top 40 - 2000

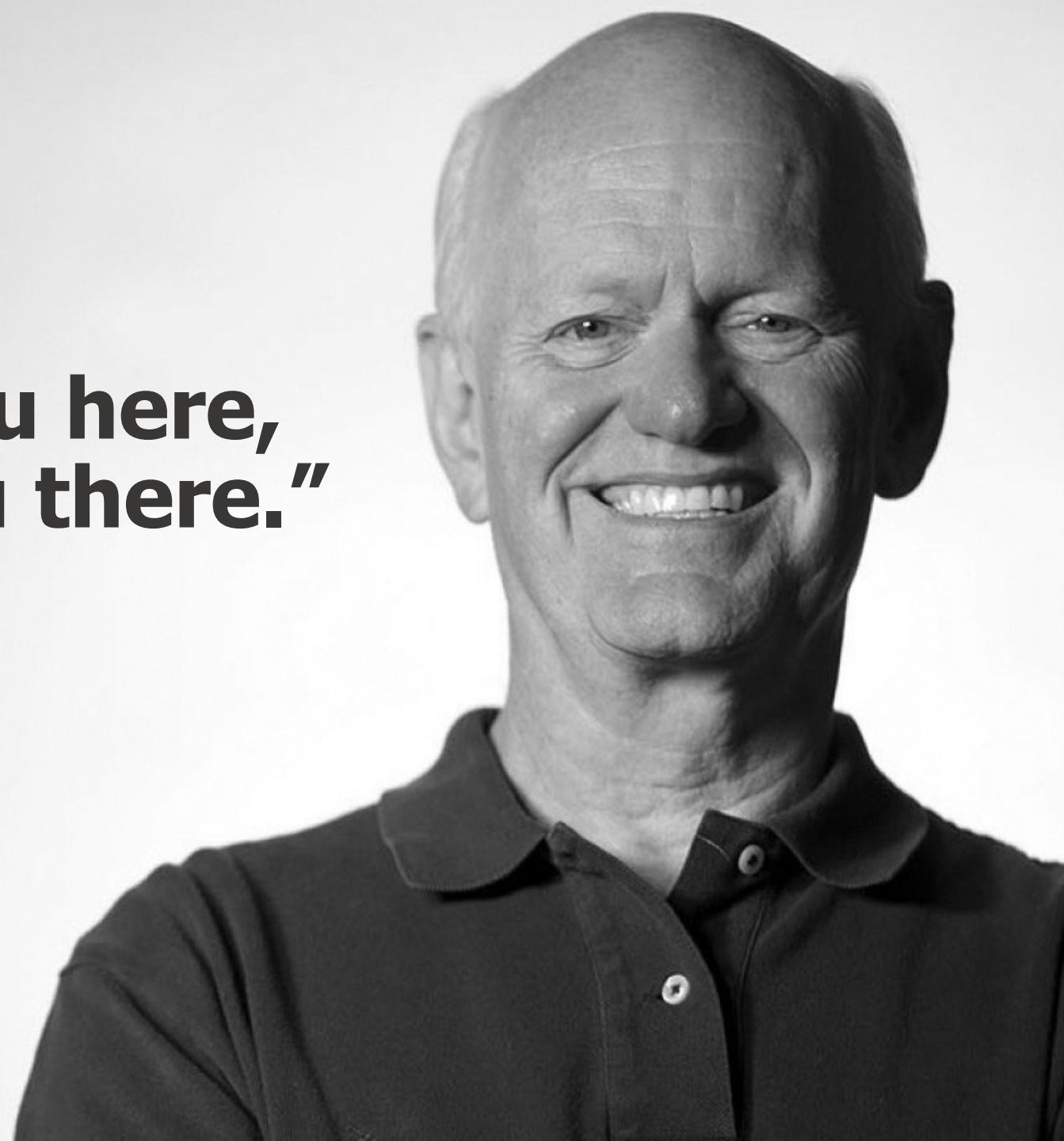


Implications for GME programs



**“What got you here,
won’t get you there.”**

-Marshall Goldsmith



GME Trends



Today's discussion

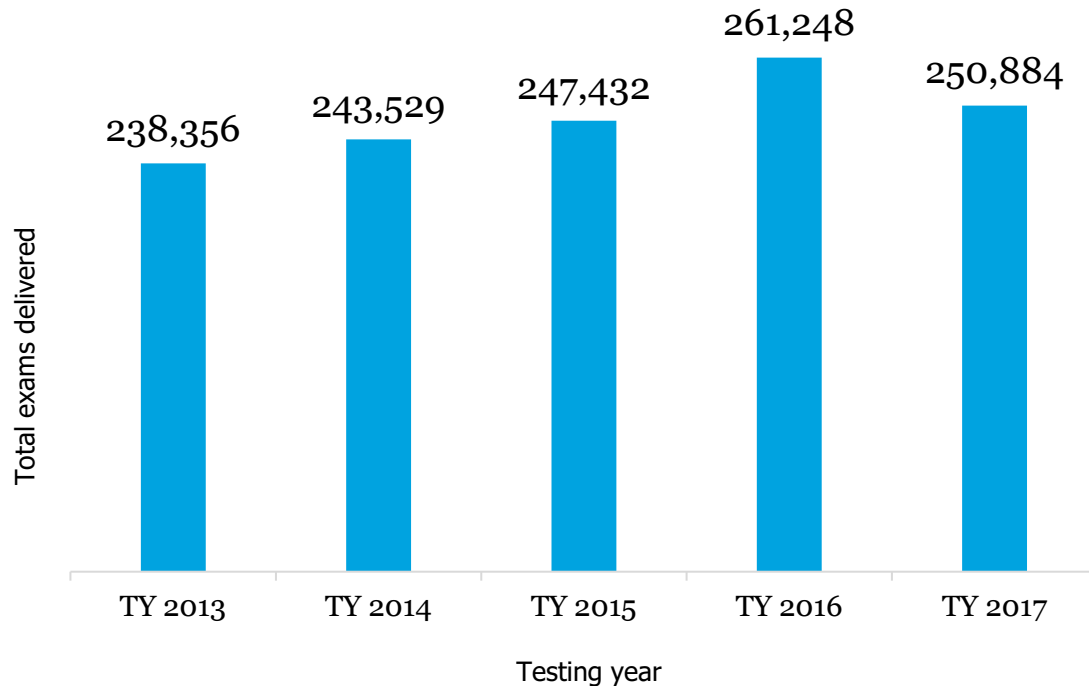
Overall market trends

Canadian international candidate pipeline

Canadian domestic candidate pipeline

Global GMAT testing sees first drop in 5 years

Total GMAT exams delivered, TY 2013 – TY 2017



Overall GMAT testing declined **4%** year-on-year, but is up more than **5%** over the last five years.

GMAT data, TY 2013 – TY 2017.

Asia-Pacific region driving global growth

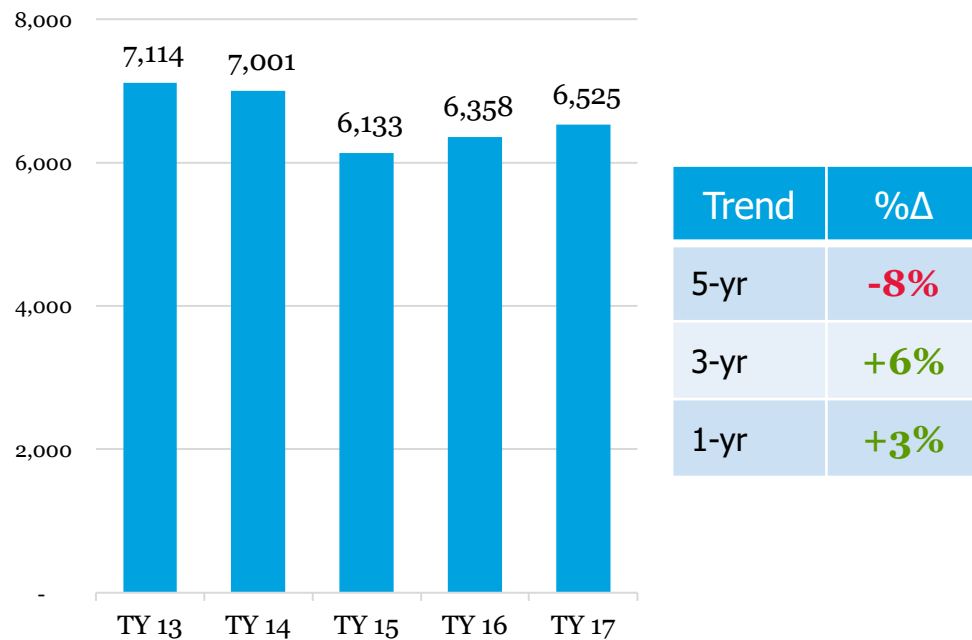
Total GMAT exams delivered, by world region of citizenship, TY 2013 – TY 2017

World region	TY 2013	TY 2016	TY 2017	1-yr % change	5-yr % change
Asia-Pacific	97,763	125,928	122,426	-3%	+25%
North America	97,041	90,051	85,945	-5%	-11%
Europe	22,671	23,842	22,986	-4%	+1%
Middle East & Africa	14,137	12,674	11,143	-12%	-21%
Latin America	6,744	8,753	8,384	-4%	+24%
Canada	6,500	6,641	6,083	-6%	-8%

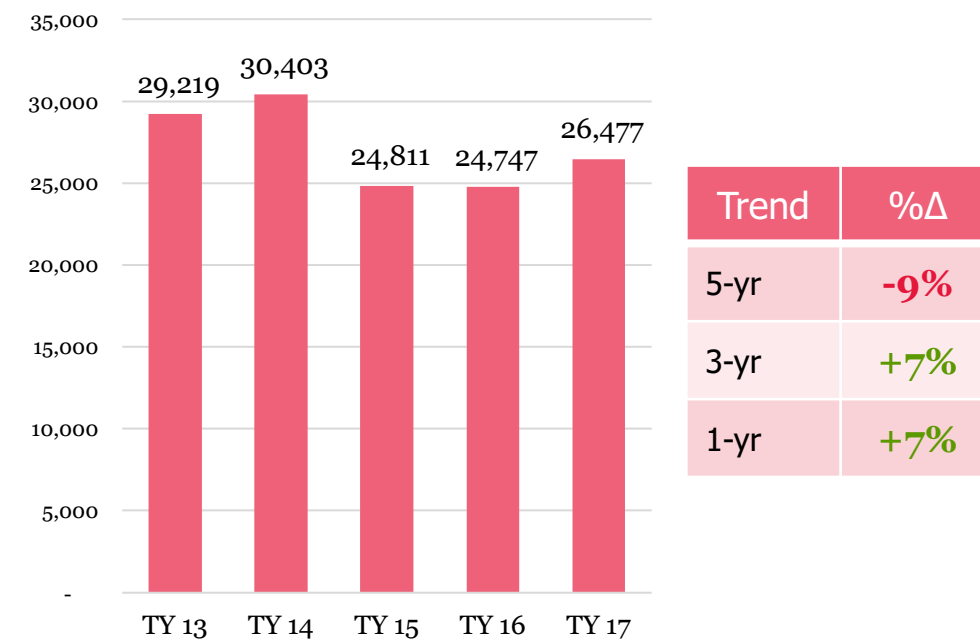
GMAT data, TY 2013 – TY 2017.

Spotlight on Canada: GMAT score sending

Total number of unique GMAT score senders to Canadian business schools, TY 2013 – TY 2017



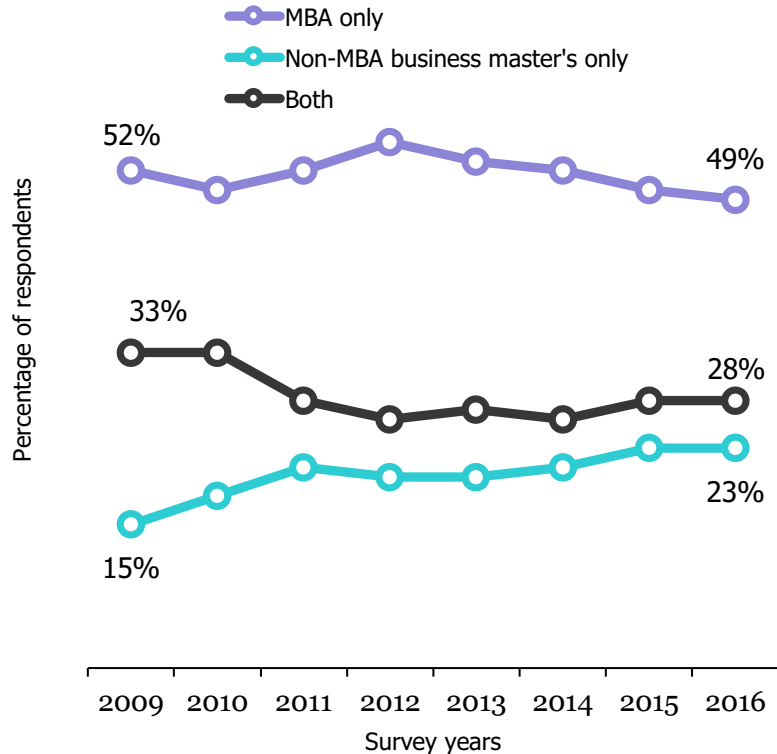
Total number of GMAT score reports sent to Canadian business schools, TY 2013 – TY 2017



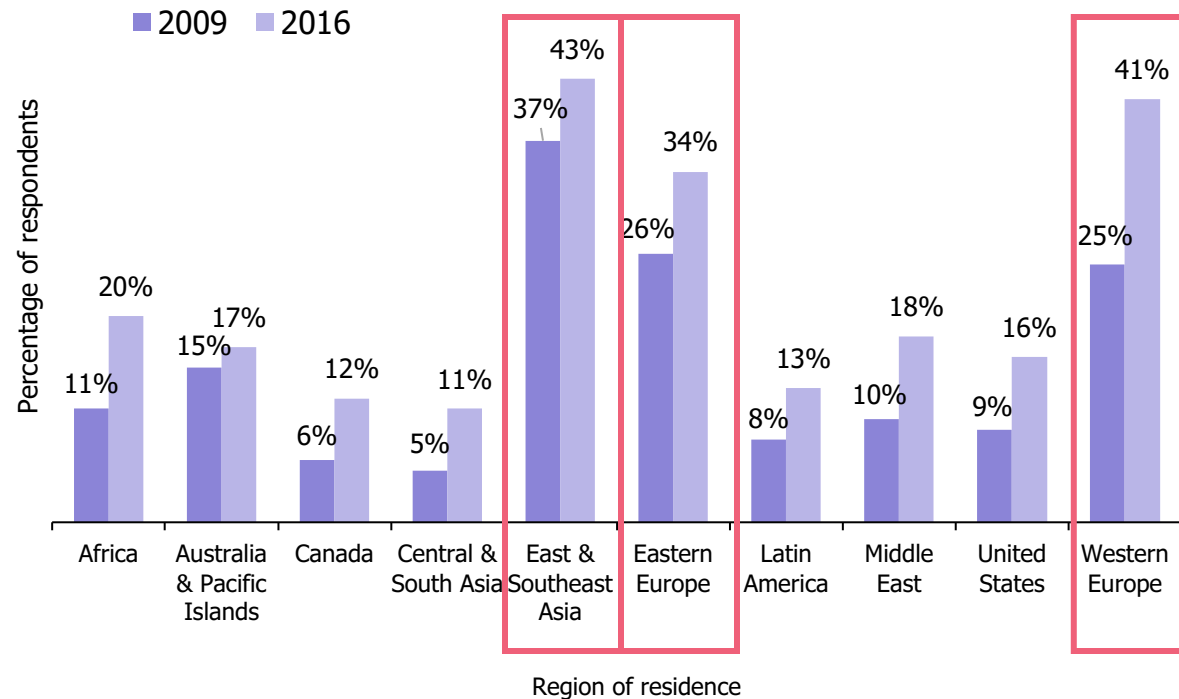
GMAT data, TY 2013 – TY 2017.

MBA still dominant; demand shifting to business master's programs

Program types considered, 2009-2016



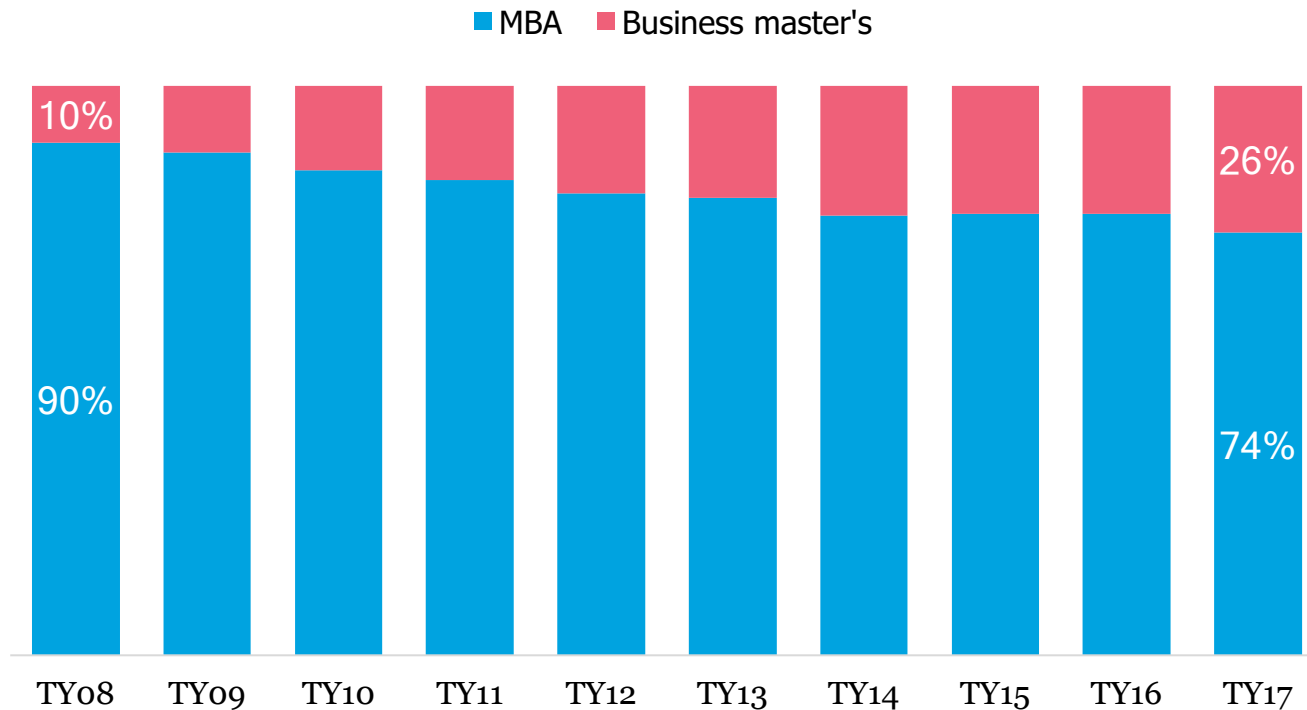
Percentage of candidates seeking only business master's programs, by region, 2009 vs. 2016



GMAC (2017) mba.com Prospective Students Survey.

Canadian business schools see shifting preferences for business master's programs

GMAT score reports sent to Canadian business schools, by program type, TY 2008 – TY 2017



1 in 4 GMAT score reports sent to Canadian business schools now go to business master's programs.

GMAT data, TY 2008 – TY 2017.

MFin, MiM see increased share of score reports; MBA programs see reduced share

Percentage of GMAT score reports sent to Canadian business schools by program type, TY 2008 – TY 2017

Program type	TY 2008	TY 2017	10-yr Change
MBA, full-time, 2 years	39.4%	37.0%	-2.5%
MBA, full-time, less than 2 years	27.1%	23.9%	-3.2%
Master in Finance	2.0%	9.3%	+7.3%
MBA, part-time	16.6%	8.6%	-8.0%
Master in Management	3.4%	7.5%	+4.1%
PhD in Business	5.2%	4.2%	-1.0%
Master in Accounting	1.7%	2.5%	+0.8%
Executive MBA, 2 years	2.2%	1.5%	-0.7%

GMAT data, TY 2008 – TY 2017.

Today's discussion

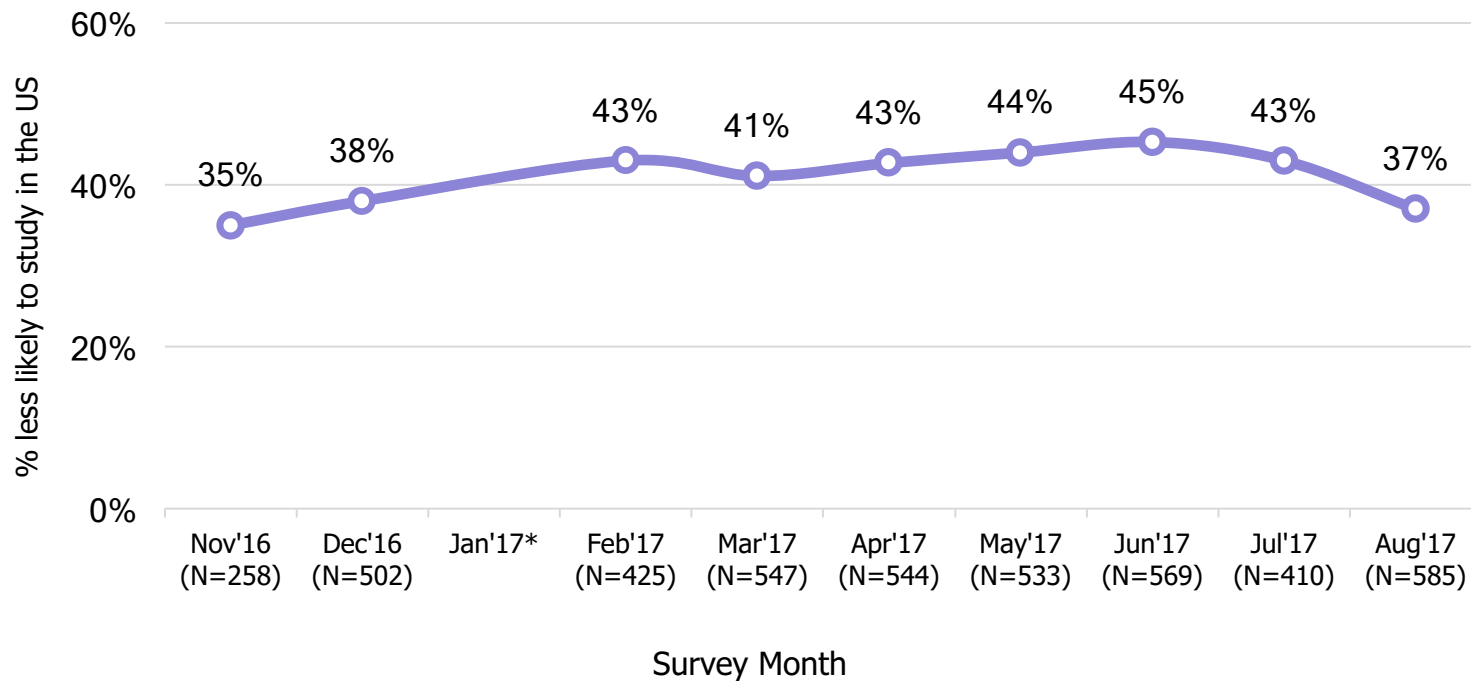
Overall market trends

Canadian international candidate pipeline

Canadian domestic candidate pipeline

Effect of the current US political climate

mba.com registrants survey: How, if at all, has the new US president influenced your decision to pursue a graduate business degree in the US?



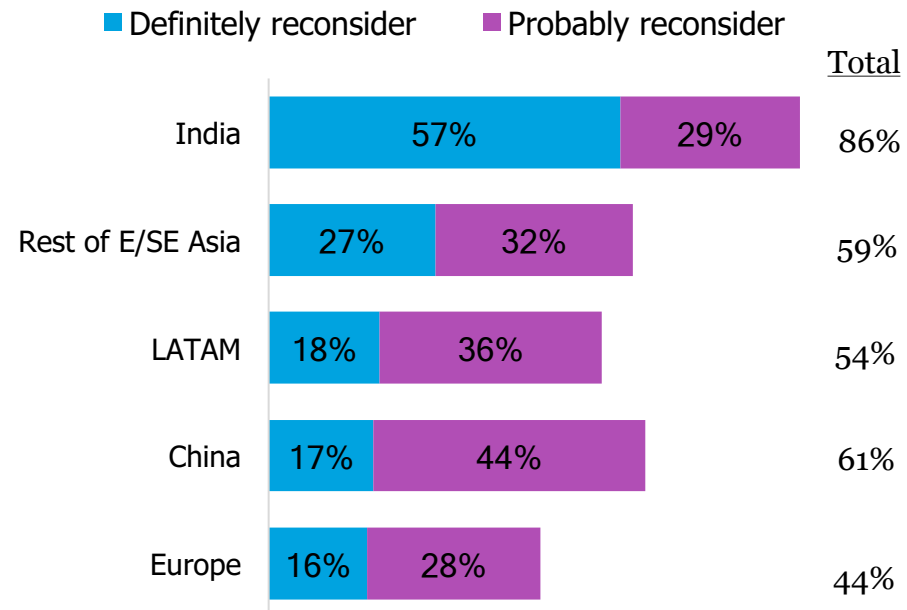
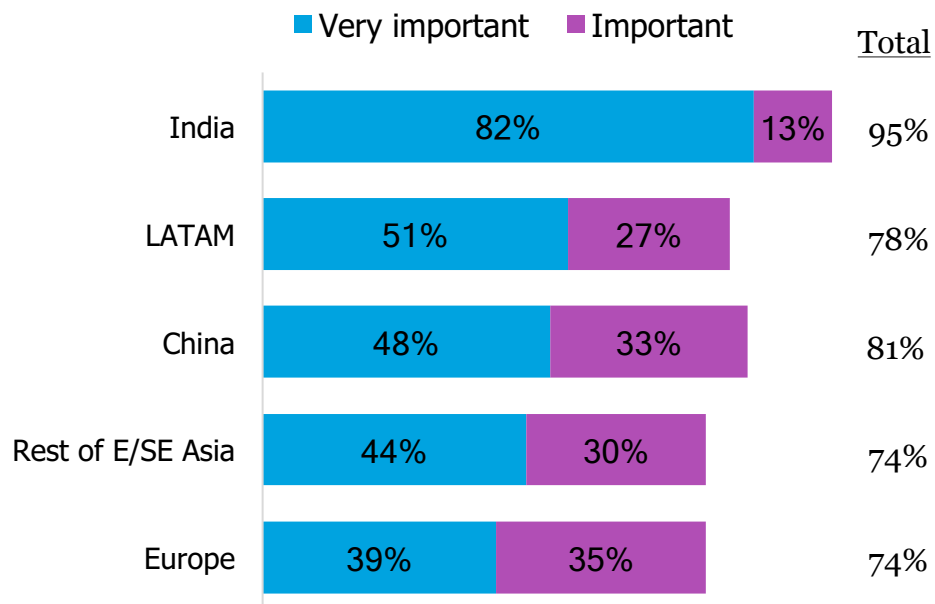
Since the election, between 35% and 45% of non-US candidates surveyed each month said they were less likely to apply to a US business school.

mba.com registrants survey. *Survey not in the field January 2017.

Availability of work visas a critical issue

How important is obtaining a work visa after completing your education in your preferred study destination?

If you were unable to obtain a work visa in your preferred study destination, would you reconsider where you would pursue your education?



Survey of 691 non-U.S. citizen GMAT test takers who sent at least one score report to a U.S. program in Q4 2016.

International candidate demand shifting to Canada, Western Europe

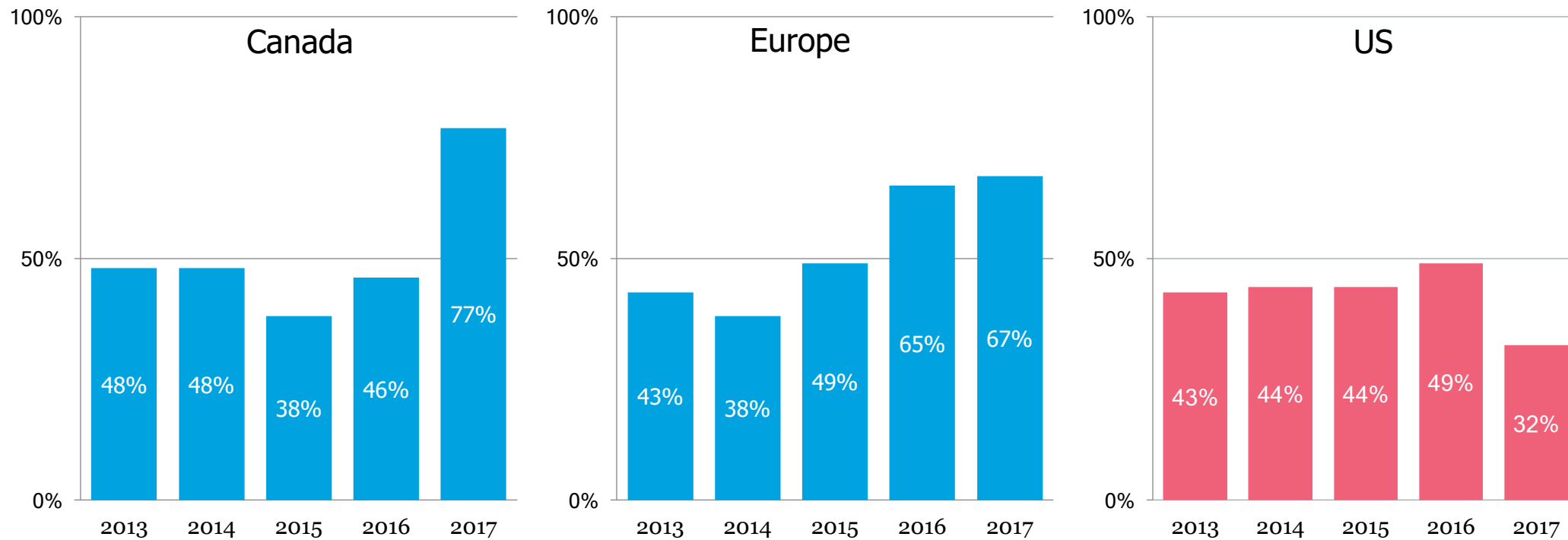
mba.com registrants survey: Where candidates are planning to submit applications by region of citizenship among candidates who had considered studying in the US but are not planning to apply to a US program

		Region of Citizenship							
		Africa (n=86)	E & SE Asia/PI (n=222)	Canada (n=31)	Central & South Asia (n=146)	Eastern Europe (n=44)	Latin America (n=38)	Middle East (n=26)	Western Europe (n=157)
Location of programs for application	Australia & Pacific Islands	10%	12%	3%	25%	2%	8%	15%	6%
	Canada	36%	13%	90%	36%	2%	34%	15%	6%
	Central & South Asia	2%	7%	3%	25%	0%	8%	0%	3%
	East & Southeast Asia	5%	34%	3%	18%	5%	3%	0%	8%
	Eastern Europe	17%	9%	0%	23%	25%	21%	12%	13%
	Western Europe	40%	42%	19%	32%	84%	58%	38%	87%
	Don't Know	6%	12%	0%	18%	5%	3%	8%	5%

mba.com Prospective Student poll (February – July 2017).

Canada, Europe make int'l app gains in 2017

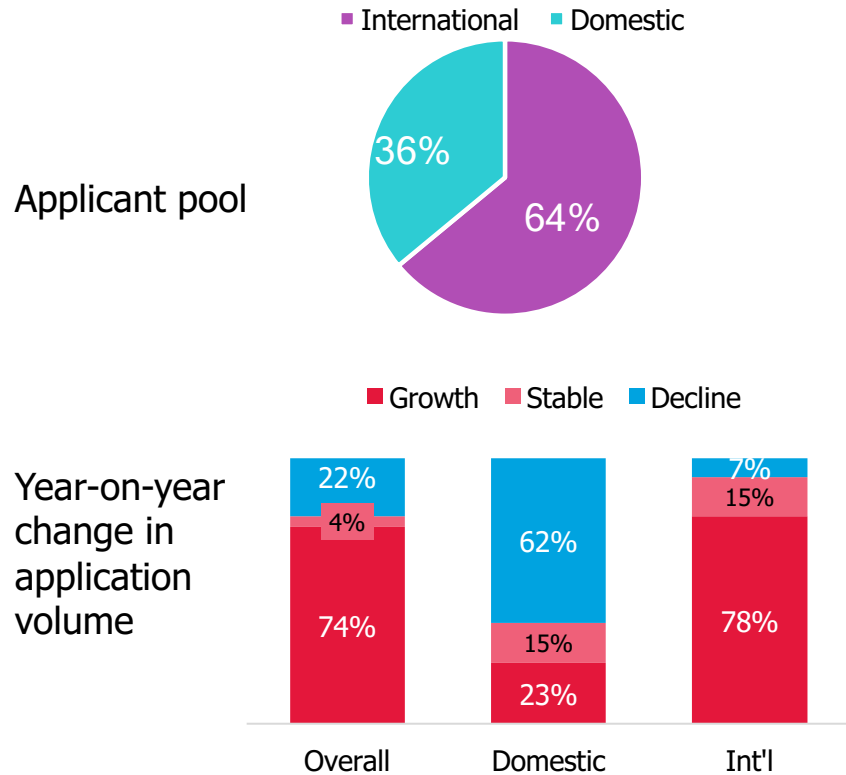
Percentage of programs reporting international application growth, by program location and survey year



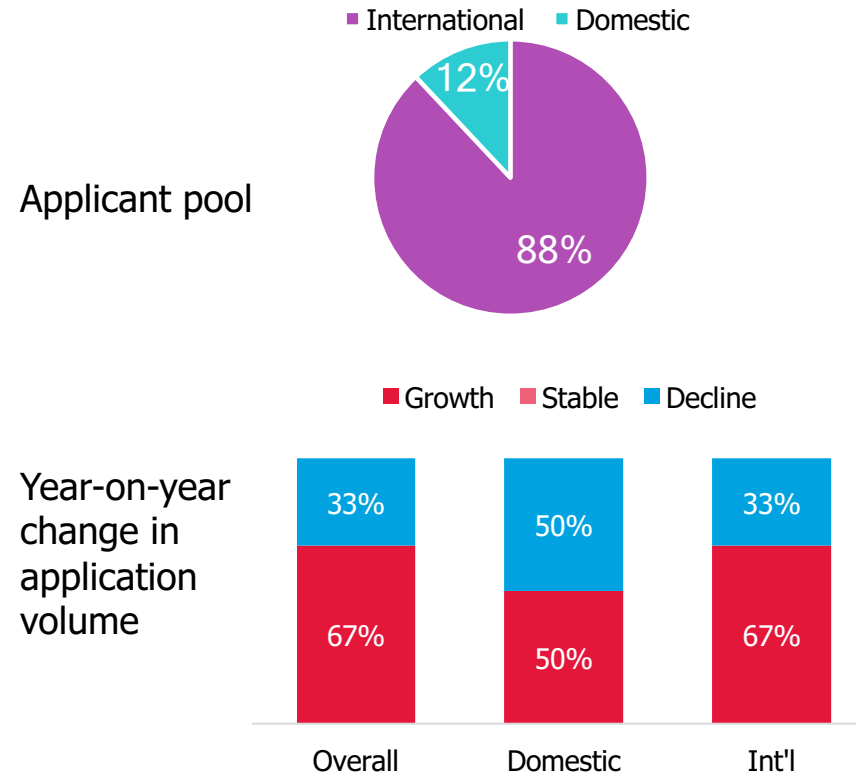
GMAC (2017) Application Trends Survey.

Canadian MBA and business master's programs in 2017

Canadian MBA programs



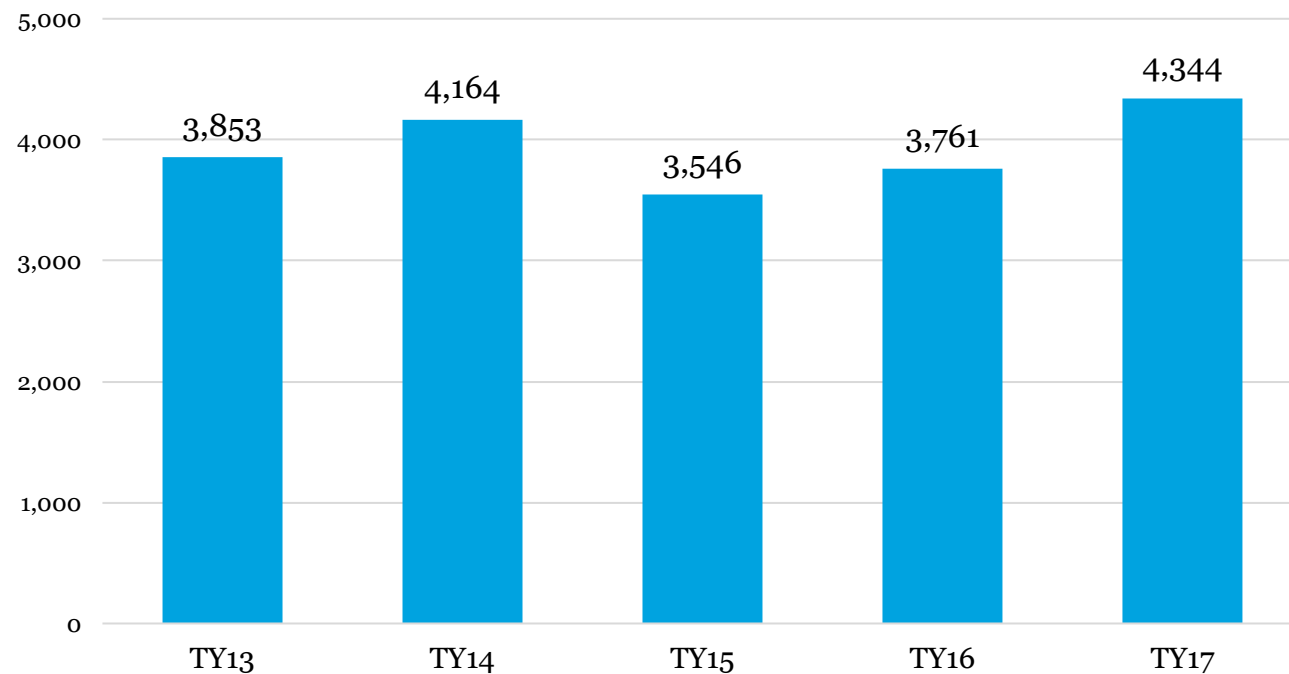
Canadian business master's programs



GMAC (2017) Application Trends Survey.

International pipeline to Canadian b-schools

Total number of unique non-Canadian citizens sending GMAT score reports to Canadian business schools



TY 2017 was a record year for int'l candidate interest in Canadian b-schools

Trend	%Δ
5-yr	+13%
3-yr	+23%
1-yr	+16%

GMAT data, TY 2013 – TY 2017.

India supplants China as the top international candidate market for Canadian schools

Total number of unique non-Canadian citizens sending GMAT score reports to Canadian business schools, by country

	TY 2013	TY 2017	5-yr trend
India	960	1,481	+54%
China	1,307	1,390	+6%
Nigeria	170	226	+33%
Pakistan	146	141	-3%
Brazil	32	90	+181%
Bangladesh	61	69	+13%
Vietnam	30	66	+120%
Iran	122	65	-47%

The number of unique candidates from India increased by 361 this year alone (33%)

GMAT data, TY 2013 – TY 2017.

Top program types pursued by non-Canadian citizens applying to Canadian b-schools

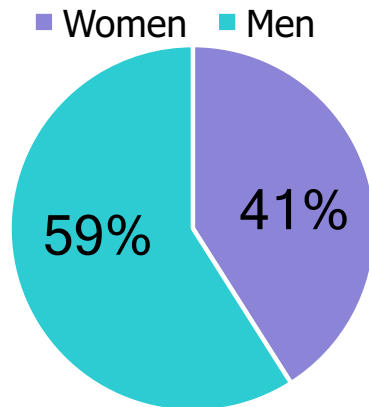
Percentage of GMAT score reports sent to Canadian business schools by non-Canadian citizens, by program type, TY 2008 – TY 2017

Program type	TY 2008	TY 2017	10-yr Change
MBA, full-time, 2 years	40.6%	38.0%	-2.6%
MBA, full-time, less than 2 years	28.1%	23.3%	-4.8%
Master in Finance	3.3%	11.7%	+8.4%
Master in Management	4.9%	8.9%	+4.0%
PhD in business	8.2%	4.9%	-3.3%
MBA, part-time	8.7%	3.1%	-5.6%
Master in Accounting	2.1%	3.0%	+0.9%
Other Masters, full-time	1.2%	2.8%	+1.6%
Master in Economics	0.0%	1.6%	+1.6%

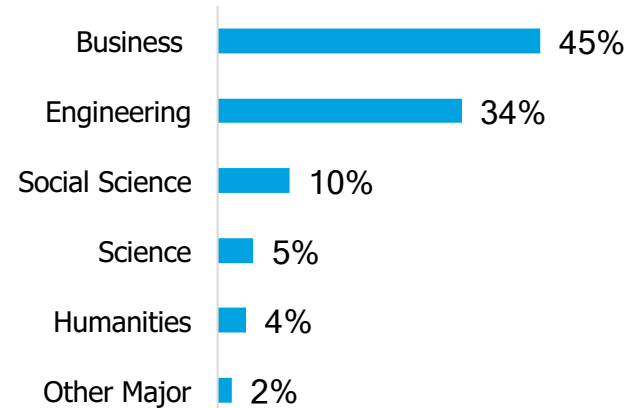
Demographics of international candidates

4,344

Total number of unique non-Canadian citizen candidates in TY 2017



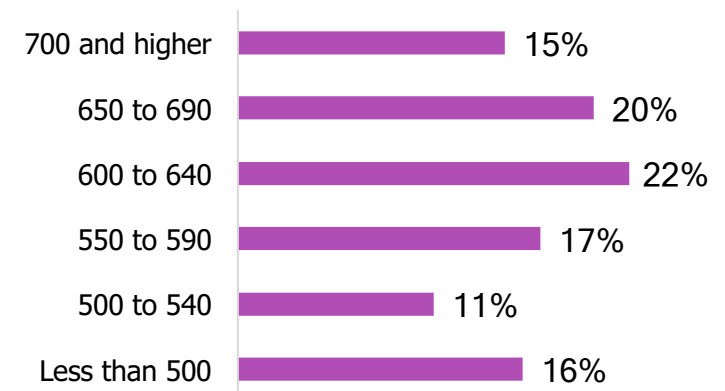
Undergrad major



591

Mean total score

Total score band



26

Mean age

4

Mean years full-time experience

GMAC Global Candidate Segmentation



**Motivations
to pursue
GME**

**Motivations
to apply to a
specific
school**

Survey Population

5,900

candidates from the
general population

20-45

years old

2

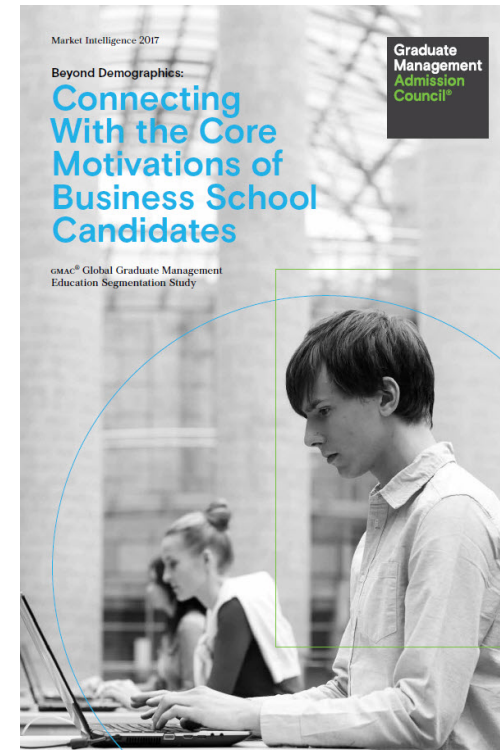
years or less since
applying to GME

15

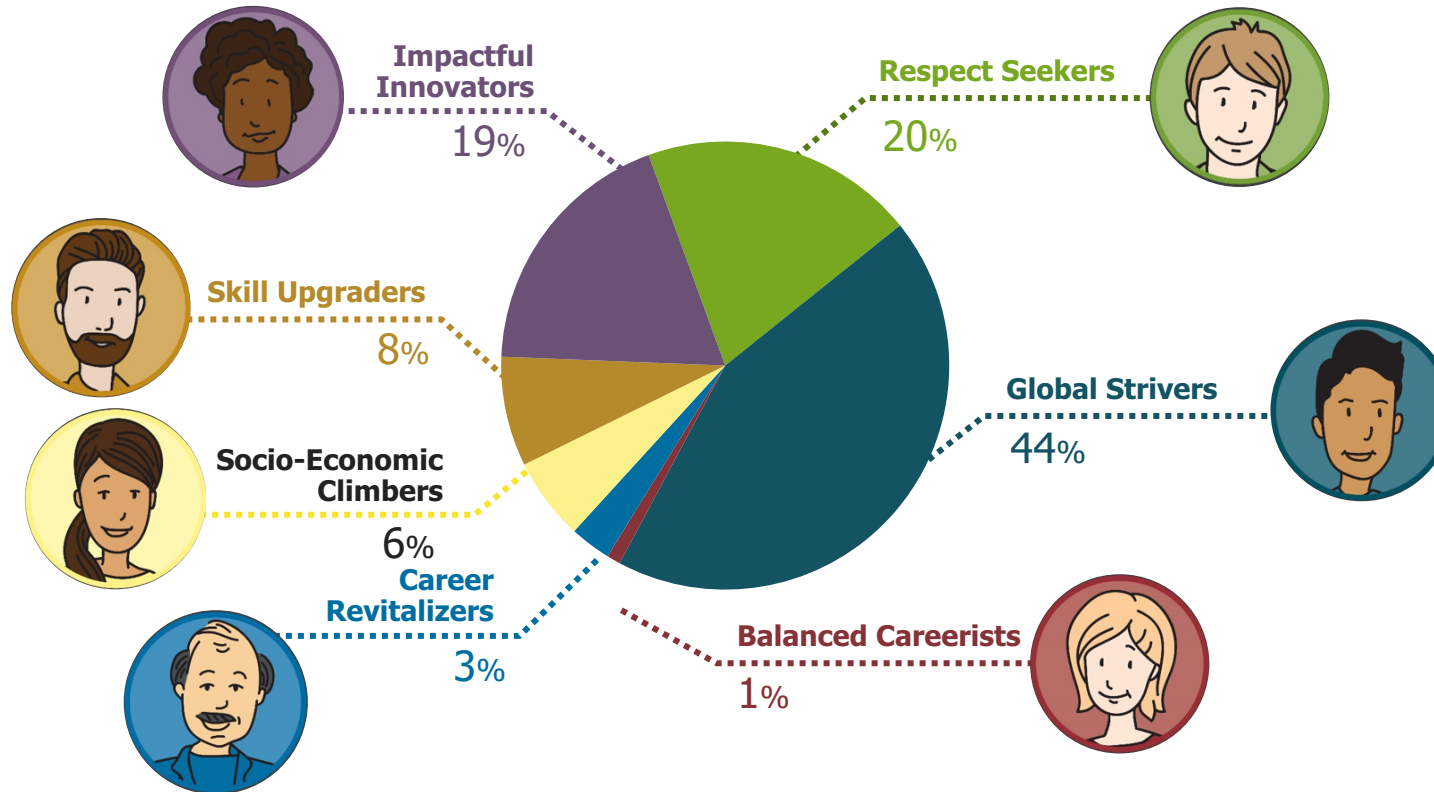
Countries

11

languages



Segments of int'l candidates preferring to study in Canada



Global Strivers



I am committed to exploring the world of opportunities that awaits

	Motivations to pursue GME vs. global average	Motivations to select a specific school vs. global average
1	Gain international exposure	Recognized by global employers
2	Gain access to employment opportunities in other countries	Well-known internationally
3	Improve specific skills	Ranked highly

Value proposition:

There is no limit to what you can achieve with a graduate management education.

Respect Seekers



A GME degree will give me the status and respect I crave.

Motivations to pursue GME vs. global average	Motivations to select a specific school vs. global average
1 Be a role model	My parent(s) graduated from this school
2 Make my parents proud	Want to experience the location
3 Get more respect	Doesn't require any admissions exams

Value proposition:

GME graduates are a part of an elite club.

How schools can leverage segmentation

Learn

- Read the white papers on gmac.com/segments
- Attend presentations & workshops at industry events

Identify

- Apply the segmentation survey to your current and incoming classes
- Add segmentation widget to your website

Target & tailor

- Improve marketing & outreach efforts
- Develop new programs
- Future integration into GMASS

Today's discussion

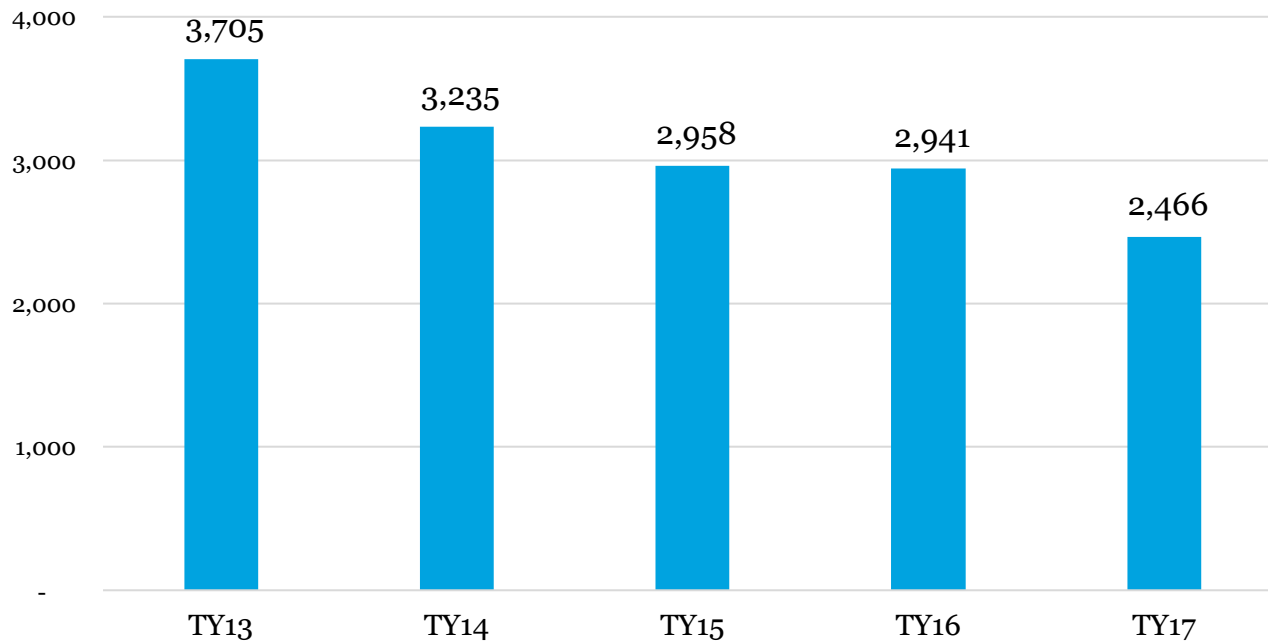
Overall market trends

International candidate pipeline

Domestic candidate pipeline

Domestic candidate pipeline

Total number of unique Canadian examinees sending GMAT score reports to Canadian business schools



The domestic pipeline declined 16% this year.

Trend	%Δ
5-yr	-33%
3-yr	-17%
1-yr	-16%

Canadian pipeline by province

Total number of unique Canadian examinees sending GMAT score reports to Canadian business schools by province of residence

	TY 2013	TY 2017	5-yr % change
Total	3,705	2,466	-33%
Ontario	2,100	1,258	-40%
Alberta	408	346	-15%
Quebec	392	308	-21%
British Columbia	341	209	-39%
Outside Canada	127	103	-19%
Nova Scotia	126	80	-37%
Saskatchewan	62	55	-11%
Manitoba	53	50	-6%
Newfoundland	59	36	-39%
New Brunswick	30	14	-53%

GMAT data, TY 2013 – TY 2017.

Top program types pursued by Canadian citizens applying to Canadian b-schools

Percentage of GMAT score reports sent to Canadian business schools by Canadian citizens, by program type, TY 2008 – TY 2017

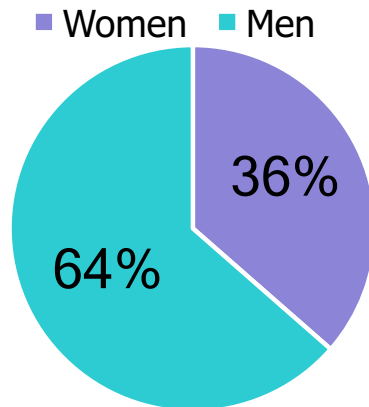
Program type	TY 2008	TY 2017	10-yr Change
MBA, full-time, 2 years	38.4%	33.9%	-4.5%
MBA, full-time, less than 2 years	26.1%	25.7%	-0.4%
MBA, part-time	24.2%	24.8%	+0.6%
Master in Management	2.0%	3.4%	+1.3%
Executive MBA, 2 years	3.0%	2.5%	-0.4%
Master in Finance	0.8%	2.1%	+1.3%
PhD in business	2.3%	1.9%	-0.4%
Other Masters, full-time	0.2%	1.6%	+1.3%
Master in Accounting	1.4%	1.3%	-0.1%

GMAT data, TY 2008 – TY 2017.

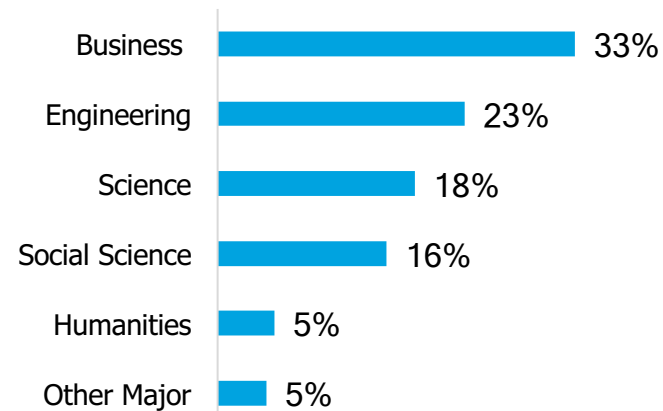
Demographics of domestic candidates

2,181

Total number of unique Canadian citizen candidates in TY 2017



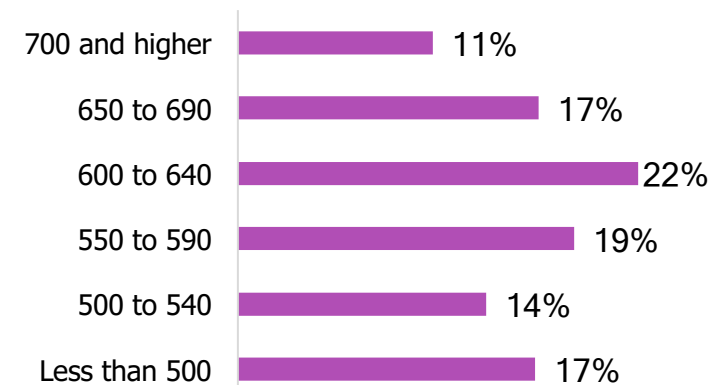
Undergrad major



584

Mean total score

Total score band



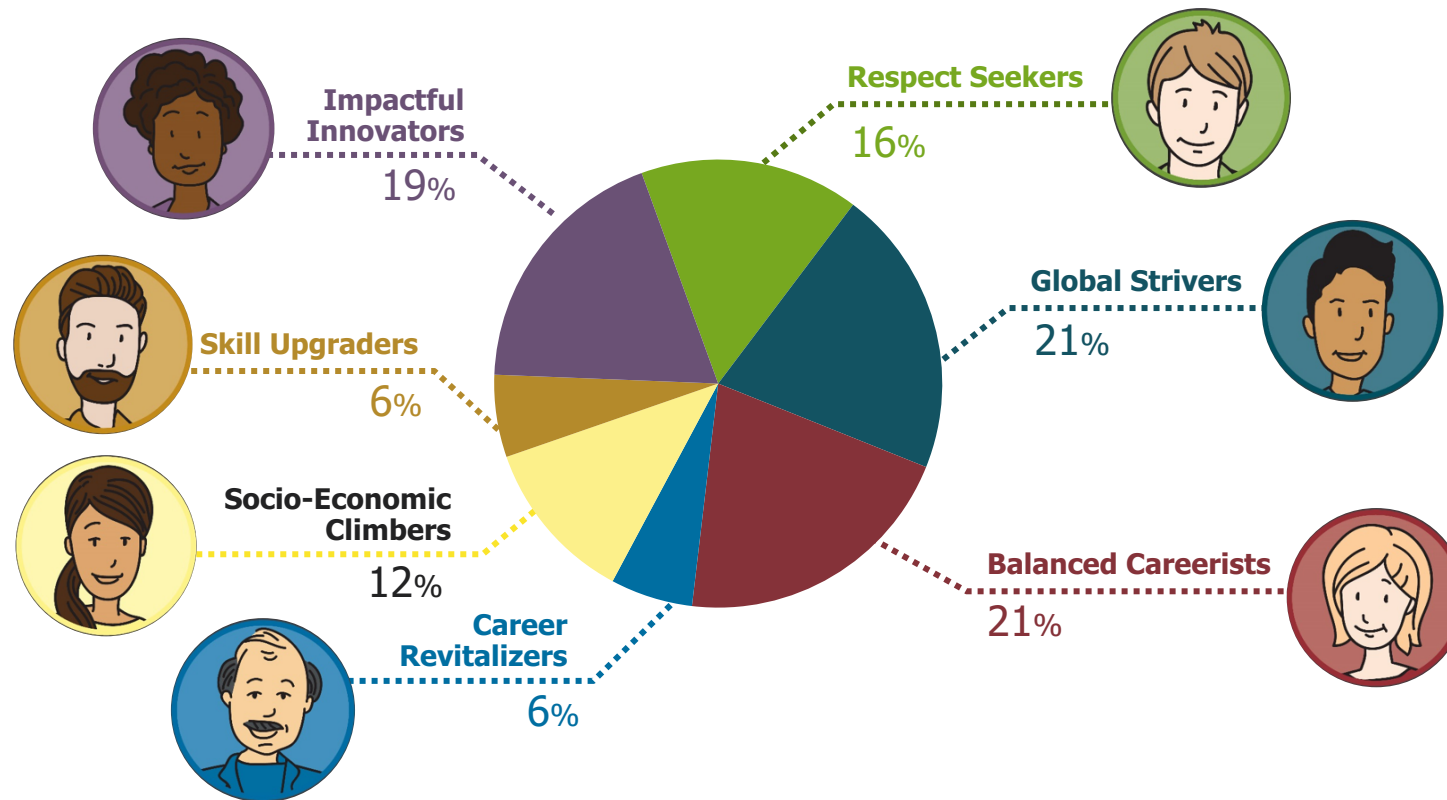
27

Mean age

4

Mean years full-time experience

Segments of domestic candidates preferring to study in Canada



Balanced Careerists



*I want to advance,
but school must not disrupt my life.*

	Motivations to pursue GME vs. global average	Motivations to select a specific school vs. global average
1	Earn more money	Located nearby so I can commute from home
2	Provide stability in my career	Located in my current country
3	Advance more quickly in my career	Has lower tuition cost than other schools

Value proposition:

With so many flexible program and class options, you can fit a graduate management degree into your life.

Impactful Innovators



*I have great ideas—
I just need the skills to bring them to life.*

	Motivations to pursue GME vs. global average	Motivations to select a specific school vs. global average
1	Improve specific skills	Has excellent academic reputation
2	Develop skills to have a greater social impact	Has good reputation for its business programs
3	Improve my management skills	Has specific program that meets my needs

Value proposition:

A graduate business degree will give you the skills and connections to change the world.

GMAC Toronto Regional Event

November 16th

**University of Toronto – Rotman
School of Management**

Questions?