

Canada's Top 50 Research Universities List 2012 Analysis

Research Income Growth Stalls

Canada's Top 50 Research Universities recorded a 2.2% gain in combined research income in Fiscal 2011, down from 3.6% in Fiscal 2010. Total research income reached \$6.63 billion from \$6.48 billion in Fiscal 2010. The 2011 research income growth result was the worst showing since RESEARCH Infosource began tracking the Top 50 in 2001. The previous lowest growth result recorded (3.0%) was between Fiscal 2008 and Fiscal 2009. The highest research income gain in the past dozen years (23.9%) was between Fiscal 2000 and Fiscal 2001.

The \$100 Million Club Holds Firm

Eighteen universities – up from 16 last year gained membership in RESEARCH Infosource's \$100 Million Club – an elite group that attracted at least \$100 million of research income in Fiscal 2011. Club members garnered a total of nearly \$5.7 billion of research income, an increase of 3.9% from the previous year. As such, they accounted for 86% of total university research income, slightly up from 85% in Fiscal 2010. All but 3 universities (Guelph, Waterloo and Victoria) are Medical/Doctoral institutions - universities with medical schools. Fourteen of the 18 Club members posted gains in research income and 4 saw their research income decline over the period.

The \$100 Million Club		
2011 Rank	University	Research Income \$000
1	University of Toronto*	\$915,661
2	University of British Columbia*	\$575,155
3	University of Alberta*	\$536,063
4	Université de Montréal*	\$525,705
5	McGill University*	\$522,913
6	McMaster University*	\$325,946
7	Université Laval*	\$299,362
8	University of Calgary*	\$286,420
9	University of Ottawa*	\$276,220
10	Western University*	\$218,729
11	University of Saskatchewan*	\$203,179
12	University of Manitoba*	\$166,303
13	Queen's University*	\$163,280
14	University of Guelph	\$153,068
15	University of Waterloo	\$146,779
16	Université de Sherbrooke*	\$145,493
17	Dalhousie University*	\$132,461
18	University of Victoria	\$103,249

*Has a medical school

Notable Changes in Provincial Performance

Examining provincial performance, university research income rose in 7 provinces and declined in 3. Gains were strongest in Saskatchewan where 2 universities posted a total increase of 8.0% in research income. UPEI boosted Prince Edward Island's total by 7.0%, while 13 Quebec institutions posted a combined gain of 6.1% and 4 British Columbia universities upped provincial research income by 5.8%. Provincial research income totals fell over the period in New Brunswick (-10.4%), Newfoundland (-5.8%) and Ontario (-2.0%). Research income growth in Manitoba (1.8%) also lagged the national increase of 2.2%.

Ontario universities' 18 institutions captured 38% of the national total, down from 39% in Fiscal 2010. Quebec's 13 institutions increased their share to 27% of the total from 26% in Fiscal 2010. Over the period share was steady in Alberta (13% of the total) and increased 1% in British Columbia (12% of the total).

Top 50 –Leading Provinces	
Province	% of Total
Ontario (18)	38
Quebec (13)	27
Alberta (3)	13
British Columbia (4)	12

Gainers and Losers

Overall, the proportion of universities that reported gains and declines in their research income remained the same this year. In Fiscal 2011, 34 universities posted gains in research income compared with 16 universities reporting declines, versus 33 gainers and 17 decliners last year. However, this year all but one of the top gainers were from Undergraduate universities. The top gainers were Université du Québec à Chicoutimi (111.1%), Université du Québec en Abitibi-Témiscamingue (43.9%), University of Lethbridge (38.7%), Ryerson University (31.1%) and Université de Sherbrooke (30.0%). In total, 29 institutions had research income growth in excess of the 2.2% national average.

Top 10 Universities by Growth**				
2011 Rank			% Change 2010-2011	
	Income Growth	Overall		University
1		27	Université du Québec à Chicoutimi	111.1
2		39	Université du Québec en Abitibi-Témiscamingue	43.9
3		32	University of Lethbridge	38.7
4		29	Ryerson University	31.1
5		16	Université de Sherbrooke*	30.0
6		35	Lakehead University*	28.3
7		50	University of Winnipeg	27.0
8		44	Wilfrid Laurier University	26.2
9		33	Université du Québec à Trois-Rivières	23.3
10		45	University of Ontario Institute of Technology	20.8

*Has a medical school

**Includes full-service institutions only

As in past years, a number of institutions saw their research income decline; however, year-on-year changes are not uncommon.

Bottom 10 Universities by Growth**			
2011 Rank		University	% Change 2010-2011
Income Growth	Overall		
1	6	McMaster University*	-17.6
2	13	Queen's University*	-17.1
3	23	Carleton University	-15.8
4	48	Saint Mary's University	-14.5
5	49	St. Francis Xavier University	-13.4
6	25	University of New Brunswick	-10.5
7	47	Université de Moncton	-9.7
8	43	University of Northern British Columbia	-9.7
9	21	Université du Québec à Montréal	-7.7
10	36	University of Regina	-7.5

*Has a medical school

**Includes full-service institutions only

Apparent ties due to rounding

Slow Growth in Research Intensity

Research intensity – research income per full-time faculty position – eked out a small 1.7% gain in Fiscal 2011, one of the smallest increases over the decade. The sub-par 2.2% income increase combined with a 0.6% rise in faculty to lower the research intensity increase from 2.3% the previous year. On average the Top 50 Research Universities each attracted \$174,200 per faculty compared with \$171,400 last year. A total of 14 universities posted research intensity that was higher than the national average. University of Toronto (\$377,300 per full-time faculty position) led the pack McGill University (\$331,400), University of Alberta (\$329,100), Université de Montréal (\$281,300) and McMaster University (\$248,600) rounded up the top 5.

Top 10 Research Intensive Universities**			
2011 Rank		University	Research Intensity (\$ per full-time faculty) \$000
Research Intensity	Overall		
1	1	University of Toronto*	\$377.3
2	5	McGill University*	\$331.4
3	3	University of Alberta*	\$329.1
4	4	Université de Montréal*	\$281.3
5	6	McMaster University*	\$248.6
6	2	University of British Columbia*	\$245.2
7	7	Université Laval*	\$226.3
8	9	University of Ottawa*	\$213.1
9	13	Queen's University*	\$200.1
10	14	University of Guelph	\$192.5

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Tier Shares Steady

Sixteen Medical/Doctoral universities accounted for 81% of total research income in Fiscal 2011, the same share as in Fiscal 2010. However, the share of total research income of the 12 Comprehensive institutions fell to 13% of total research income from 14% in Fiscal 2010, and the share of 22 Undergraduate universities rose to 6% of the total from 5% last year. In Fiscal 2011, Medical/Doctoral institutions gained 1.9% in combined research income compared with a 4.3% increase in Fiscal 2010. Research income rose by a combined 18.4 % at 22 Undergraduate institutions in Fiscal 2011 compared to a growth of 2.8% recorded in Fiscal 2010.

Research Universities of the Year

RESEARCH Infosource highlights the achievements of 3 *Research Universities of the Year* – the leading institutions that excel on a balanced scorecard of research input and output/impact indicators (see our website for details www.researchinfosource.com/top50.shtml).

This year's winners are: University of Toronto in the Medical/Doctoral category, University of Waterloo in the Comprehensive category and University of Lethbridge in the Undergraduate category.

This Year and Next

This year's meagre 2.2% increase in research income makes last year's 3.6% gain seem positively bountiful in comparison. But research income growth has in any event been slowing in recent years from the heady days of double-digit increases in the early years of the 2000s. In the context of declining federal government spending and with public sector job layoffs accelerating the research community has, for now, dodged a fiscal bullet. Deteriorating public sector circumstances mean that the 2013 Top 50 results are likely to disappoint. Gloomy business conditions will mean that the private sector will likely be unable to pick up the slack. In any event, government sources typically account for over two-thirds of total research income versus less than 15% for corporate sources (Non-government, non-corporate income accounts for the rest.)

What are the implications for the university research community? First off, it is important to recognize that faculty researcher salaries are not affected by the research income totals; faculty salaries are mostly paid for by provincial government grants to universities. That means that pressures will be felt more in the funds available for student research assistants, technicians, minor equipment, materials, and ancillary expenses. As government resources come under continuing strain politicians will be forced to balance spending for potential future improvements to national competitiveness through university research with current spending priorities in health, social services, education, etc. Two years ago we forecast "*In a best case scenario the 'new normal' will be research income growth that keeps pace with inflation*". This year's results confirm that view.

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