

Canada's Top 50 Research Universities List 2013 Analysis

Research Income Growth Mired

Research income at Canada's Top 50 Research Universities expanded by only 1.1% in Fiscal 2012, reaching \$6.7 billion, the highest figure on record. The 2012 increase was only half that of 2011 (2.2%) and the smallest increase since RESEARCH Infosource began tracking the Top 50 Research Universities in 2001. Substantial declines in Alberta, Saskatchewan and Prince Edward Island weighed heavily on the results. On a positive note, University of Toronto is the first Canadian institution to post research income in excess of \$1 billion.

The \$100 Million Club

Nineteen universities – up from 18 last year – gained membership in RESEARCH Infosource's \$100 Million Club, the elite group of universities that attracted at least \$100 million of research income in Fiscal 2012. In total, the Club members accounted for nearly \$5.9 billion of research income, an increase of 2.8% from Fiscal 2011. Memorial University of Newfoundland joined the Club this year, posting research income of \$107 million with a substantial increase of 52.6% over Fiscal 2011. Club members also increased their total share of research income to 87% of the total in Fiscal 2012 from 86% in 2011. Nine of the 19 universities posted negative growth in research income in Fiscal 2012, compared to with 4 decliners last year. All but 3 universities (Guelph, Waterloo and Victoria) are Medical/Doctoral institutions - universities with medical schools.

| The \$100 Million Club | | |
|------------------------|--------------------------------------|-----------------------|
| 2012 Rank | University | Research Income \$000 |
| 1 | University of Toronto* | \$1,038,390 |
| 2 | University of British Columbia* | \$585,154 |
| 3 | Université de Montréal* | \$526,213 |
| 4 | McGill University* | \$483,527 |
| 5 | University of Alberta* | \$452,436 |
| 6 | McMaster University* | \$325,156 |
| 7 | Université Laval* | \$302,783 |
| 8 | University of Ottawa* | \$302,341 |
| 9 | University of Calgary* | \$282,771 |
| 10 | Western University* | \$241,095 |
| 11 | Université de Sherbrooke* | \$185,222 |
| 12 | Queen's University* | \$168,025 |
| 13 | University of Saskatchewan* | \$166,677 |
| 14 | University of Guelph | \$161,172 |
| 15 | University of Manitoba* | \$159,763 |
| 16 | Dalhousie University* | \$140,099 |
| 17 | University of Waterloo | \$137,006 |
| 18 | Memorial University of Newfoundland* | \$107,078 |
| 19 | University of Victoria | \$103,007 |

*Has a medical school

Provincial Performance

Research income totals decreased over the period and weighed heavily against the national results in Alberta (-10.9%), Saskatchewan (-15.7%), Prince Edward Island (-12.8%) and Manitoba (-3.3%). Provinces where overall research income growth out-paced the national trend included Newfoundland (52.6%), New Brunswick (6.3%), Ontario (6.2%) and Nova Scotia (4.3%). Universities in British Columbia recorded a 1.8% funding increase.

In Fiscal 2012, 18 Ontario universities increased their share of total research income to 40% from 38% over Fiscal 2011. Quebec's 13 institutions maintained their share of the total (27%), as did universities in British Columbia (12%). Alberta universities' share declined to 11% of total research income in Fiscal 2012 from 13% the prior year.

| Top 50 –Leading Provinces | |
|---------------------------|------------|
| Province | % of Total |
| Ontario (18) | 40 |
| Quebec (13) | 27 |
| British Columbia (4) | 12 |
| Alberta (3) | 11 |

Research Income Growth

In a disappointing result, 28 universities recorded declines in research income in Fiscal 2012 compared with 16 decliners last year. Only 22 institutions posted increases in research income in Fiscal 2012, compared with last year's total of 34 gainers. The top gainers were led by Memorial University of Newfoundland (52.6%), followed by Université de Sherbrooke (27.3%), St. Francis Xavier University (23.6%), University of Toronto (13.4%) and Université du Québec à Montréal (11.8%).

| Top 10 Universities by Growth** | | | |
|---------------------------------|---------|---|--------------------|
| 2012 Rank | | University | % Change 2011-2012 |
| Income Growth | Overall | | |
| 1 | 18 | Memorial University of Newfoundland* | 52.6 |
| 2 | 11 | Université de Sherbrooke* | 27.3 |
| 3 | 46 | St. Francis Xavier University | 23.6 |
| 4 | 1 | University of Toronto* | 13.4 |
| 5 | 21 | Université du Québec à Montréal | 11.8 |
| 6 | 49 | University of Winnipeg | 11.3 |
| 7 | 10 | Western University* | 10.2 |
| 8 | 8 | University of Ottawa* | 9.5 |
| 9 | 24 | University of New Brunswick | 8.4 |
| 10 | 37 | Université du Québec en Abitibi-Témiscamingue | 7.4 |

*Has a medical school

**Includes full-service institutions only

Research Intensity

Research intensity – research income per full-time faculty position – posted 0% growth in Fiscal 2012. A 1.1% increase in total research income combined with an identical increase in faculty numbers to yield the static result. On average the Top 50 Research Universities each attracted \$174,500 per full-time faculty position, compared with \$174,400 in Fiscal 2011.

A total of 14 universities – the same number as last year - posted research intensity that was higher than the national average. University of Toronto (\$422,300 per full-time faculty position) enjoyed a considerable lead over McGill University (\$296,100), Université de Montréal (\$280,000), University of Alberta (\$273,400) and University of British Columbia (\$246,500).

| Top 10 Research Intensive Universities** | | | |
|--|---------|---------------------------------|--|
| 2012 Rank | | University | Research Intensity (\$ per full-time faculty) \$000 |
| Research Intensity | Overall | | |
| 1 | 1 | University of Toronto* | \$422.3 |
| 2 | 4 | McGill University* | \$296.1 |
| 3 | 3 | Université de Montréal* | \$280.0 |
| 4 | 5 | University of Alberta* | \$273.4 |
| 5 | 2 | University of British Columbia* | \$246.5 |
| 6 | 6 | McMaster University* | \$239.4 |
| 7 | 8 | University of Ottawa* | \$236.8 |
| 8 | 7 | Université Laval* | \$229.6 |
| 9 | 14 | University of Guelph | \$214.0 |
| 10 | 12 | Queen's University* | \$206.2 |

*Has a medical school

**Includes full-service institutions only

Tier Groups

Sixteen Medical/Doctoral universities accounted for 81% of total research income in Fiscal 2012, the same share as in Fiscal 2011. Twelve Comprehensive institutions maintained their share of research income (13%). However, the 22 Undergraduate universities' share fell to 5% of total research income from 6% in Fiscal 2011 due to their overall decline in research income of -6.9% during the period.

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 http://www.researchinfosource.com/top50_univ.php).

This year's winners are: University of Toronto in the Medical/Doctoral category, University of Waterloo in the Comprehensive category and Université du Québec à Rimouski in the Undergraduate category.

This Year and Next

Fiscal 2012 was a study in contrasts so far as the performance of the university research system was concerned. On the plus side, it saw the first Canadian university ever – University of Toronto – reach \$1 billion of research income. And, the *\$100 Million Club* – the group of leading institutions that recorded over \$100 million of research income - expanded to 19, with the addition this year of Memorial University of Newfoundland.

But these achievements took place in the context of a slim 1.1% overall increase in research income for all of Canada's Top 50 Research Universities. When increased salaries, expenses and overheads are considered a 1.1% increase signifies a decline in real dollar spending. In addition, on a provincial basis, Fiscal 2012 saw double-digit drops in research income in 3 provinces. However with universities continually increasing their cross-sector collaboration and partnerships we look with expectation to next year's results.