



# ***Export Value of Nova Scotia Universities***

***Submitted to:***

***Council of Nova Scotia University Presidents***

***Submitted by:***

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## Introduction

Nova Scotia's universities play an important role in generating resources from outside the province and providing a greater export component of the province's aggregate demand, thereby providing a substantial and important contribution to economic growth of the provincial economy. This study incorporates the recently completed Council of Atlantic Ministers of Education and Training (CAMET) study of international student expenditures in 2016-17 providing a more in-depth analysis indicating the international export value of universities.

Exports include both goods and services provided to non-resident consumers or businesses by domestic producers or service providers. The purchase of university services through out-of-province enrolment at Nova Scotia's universities is included in the province's total exports.<sup>1</sup> Nova Scotia's universities are characterized as "export" industries because they meet demand (student enrolment, research, contracts) originating outside local economies in regional, national and international 'markets'.

## Enrolments

Out-of-province domestic enrolments include other Atlantic Canadians (3,849), other Canadians (9,673), and international students (7,763). Total enrolment of both international students and Canadian students from outside Nova Scotia has grown by 1,998 (10.4%) since 2010-11.

**Table 1: Comparison of student enrolment by residence of origin, Nova Scotia universities, 2016-17 versus 2010-11**

Origin	2010-11	2016-17	% Change
Other Atlantic	4,169	3,849	-7.7%
Other Canadian	9,953	9,673	-2.8%
International	5,165	7,763*	50.3%
<b>Total</b>	<b>19,287</b>	<b>21,285</b>	<b>10.4%</b>

Source: Maritime Provinces Higher Education Commission (MPHEC)

\*International student enrolment in 2016-17 is based on CAMET study.

## Student and visitor spending

The CAMET study collected 868 survey responses from international students where they were asked about their spending on all university and living costs. Statistics Canada reports average tuition paid by domestic students in Nova Scotia; these fees and also living costs are applied to domestic students. The total spending is nearly \$702 million, about 43% of which comes from international students. This total is up 13% since 2010-11 owing to the 10.4% net increase in enrolments, and increases in spending per student.

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<sup>1</sup> The general delimitation of exports is defined in Canada's system of national accounts. A region's exports include both goods and services rendered or offered by residents to non-residents, and does not necessarily imply that the service in question physically crosses the border.

**Table 2: Student spending by origin, 2016/17**

Origin	Spending
Other Atlantic	114,036,649
Other Canadian	284,520,716
International	303,409,927
<b>Total</b>	<b>701,967,292</b>

Sources: CAMET; Statistics Canada CANSIM Table 477-0122.

## Federal research grants

Nova Scotia's universities attract over \$184 million in research funds from outside the province. This is down \$36 million (16%) since 2010-11. Research funds, grants and contracts are largely spent on wages and salaries of researchers living in Nova Scotia, and represent an important injection of incremental spending generating multiplier effects for the province.

**Table 3: Canada Research Agency Grants, 2016.**

Province	NSERC	SSHRC	CIHR	CFI	Total
Nova Scotia	35,966,864	13,061,813	119,814,032	15,178,407	184,021,116

Sources: Natural Sciences and Engineering Research Council of Canada, Social Sciences and Humanities Research Council, Canadian Institutes of Health Research, Canada Foundation for Innovation.

## Context

The combined value of student and research exports is \$886 million (\$702 million and \$184 million). It is useful to compare these expenditures to the value of exports in the province's top goods producing industries. Table 4 provides Nova Scotia's top exporting industries identified in Industry Canada's Trade Data Online. The estimated exports of Nova Scotia's university services ranks 3<sup>rd</sup> behind tire manufacturing, and seafood processing exports. Universities are just above fishing exports, and well above forest product exports even if pulp mill, paper mill, and sawmill exports are combined (\$517 million). Universities represent about 17% of all exports from Nova Scotia.

**Table 4: Nova Scotia's University exports relative to top exporters, 2016**

Industry	Exports
Tire Manufacturing	1,195,341
Seafood Product Preparation and Packaging	917,886
<b>Universities</b>	<b>885,988</b>
Fishing	878,025
Pulp Mills	224,394
Paper Mills	174,824
Sawmills and Wood Preservation	118,109
Frozen Food Manufacturing	108,301
Unsupported Plastic Film, Sheet and Bag Manufacturing	85,262
Navigational, Measuring, Medical and Control Instruments Manufacturing	85,138
All others	572,138
<b>Total</b>	<b>5,230,227</b>

Source: Industry Canada, On-Line Trade Data.