

WINNING CONDITIONS

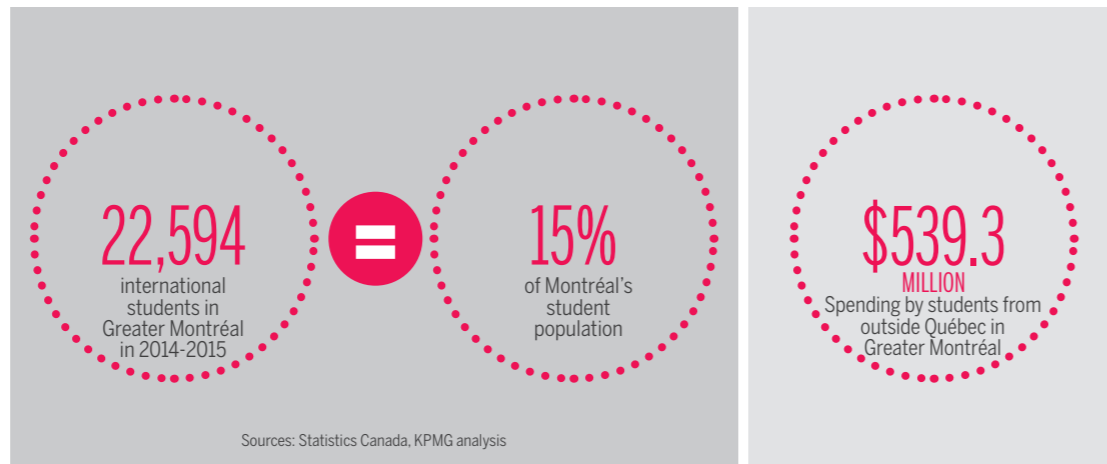
TO MAXIMIZE THE BENEFITS OF UNIVERSITIES FOR GREATER MONTRÉAL'S ECONOMY

- PROMOTE** a positive discourse that contributes to a sense of pride in universities. The government, business community and university graduates need to focus on the incredible contribution of universities, students and researchers to our collective prosperity.
- INCREASE** the proportion of university graduates in the Greater Montréal population age 25 to 34 by 5% over five years. To do this, continue public awareness efforts about the importance and advantages of a university education.
- MAKE EDUCATION**, including higher education, the priority in the Government of Québec's next budget.
- CONTINUE TO ENCOURAGE** efforts to increase retention of international students after they graduate from a Greater Montréal university to reach 10,000 by 2019.
- CREATE** a panel with representatives of universities, CEGEPS, the Government of Québec and employers to align programs at institutions of higher learning with future labour needs.
- INCREASE PARTNERSHIPS** between universities and public, private and non-profit organizations so they can be agile in meeting the needs of the labour market in terms of developing new skills.

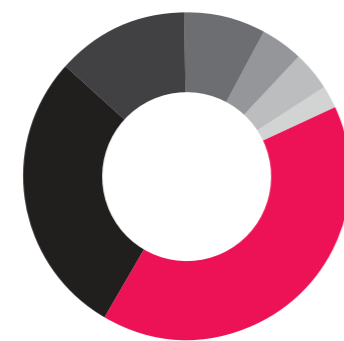
A MAGNET FOR INTERNATIONAL STUDENTS

Greater Montréal is considered the top North American city to study in and is **ranked 7th worldwide**.

Source: QS Best Student Cities 2016.



This spending helped **increase Greater Montréal's GDP** by \$367.4 million in 2014-2015



Housing and expenses
40%
Food and drink
28%
Clothing and leisure
13%
Phone and Internet
8%
Medical coverage
4%
Local transportation
4%
School supplies
2%

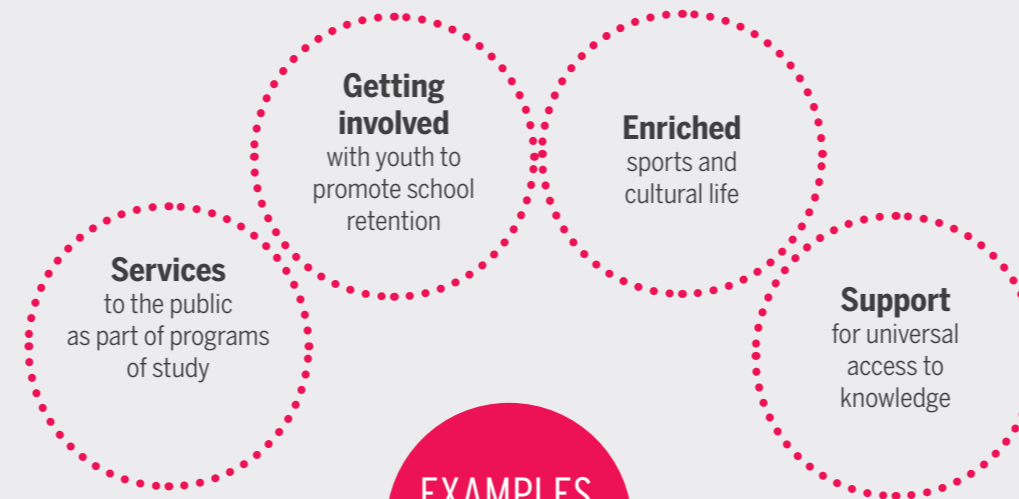
SPENDING ON GOODS AND SERVICES BY STUDENTS FROM OUTSIDE QUÉBEC ATTENDING GREATER MONTRÉAL UNIVERSITIES

2014-2015, excluding tuition fees
Source: KPMG analysis

UNIVERSITIES INVOLVED IN THE COMMUNITY

University students, professors and staff improve the quality of community life by offering a wide range of low-cost or free services.

These services meet a real need in communities, often reaching a clientele with more limited financial means.



EXAMPLES OF INITIATIVES

THE CONTRIBUTION OF GREATER MONTRÉAL UNIVERSITIES TO THE QUÉBEC ECONOMY

STUDY HIGHLIGHTS

OCTOBER 2016

To consult the full study, *The Contribution of Greater Montréal Universities to the Québec Economy*, visit the Board of Trade of Metropolitan Montreal website.

www.btm.ca

UNIVERSITIES CONTRIBUTE TO THE PROSPERITY OF GREATER MONTRÉAL AND THE KNOWLEDGE ECONOMY

EDUCATION IN GREATER MONTRÉAL:

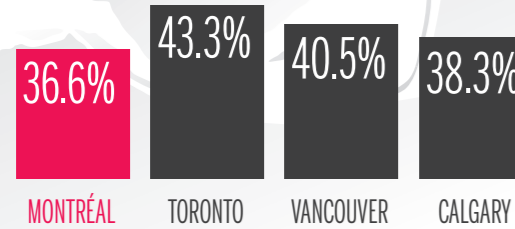
11 universities

OVER 155,000 students

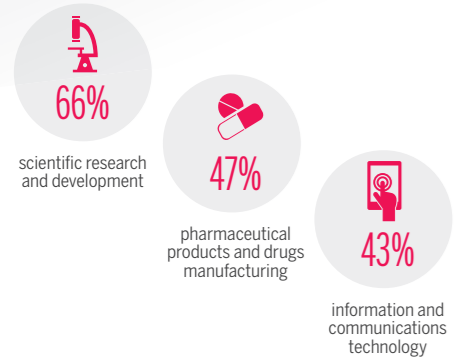
53,000 graduates in 2014-2015

Skilled labour* is the 2nd most important factor in attracting direct foreign investment to Greater Montréal.

*Including the presence of universities.
Sources: Montreal International, KPMG analysis



Population age 25 to 34 with a university degree
Sources: Statistics Canada, KPMG analysis



PERCENTAGE OF JOBS HELD BY UNIVERSITY GRADUATES

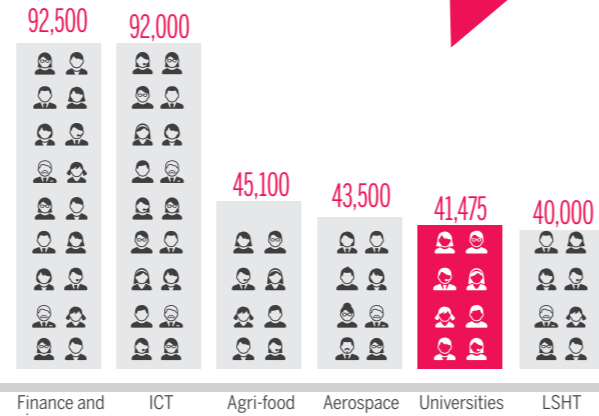
Greater Montréal's **key sectors** have a high proportion of jobs that **require a university degree**.
2011. Sources: Statistics Canada, KPMG analysis

41,475
direct jobs in Greater Montréal, almost as many as in the aerospace industry.

Montréal is the leading Canadian city for university R&D.

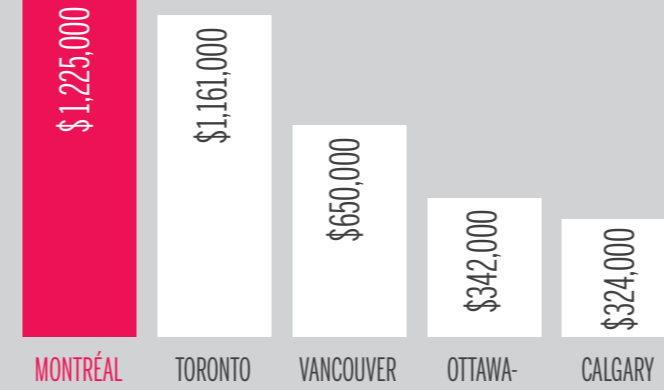
NUMBER OF EMPLOYEES BY MAJOR SECTOR

2015. CMA of Montréal
Sources: Montreal International, KPMG analysis



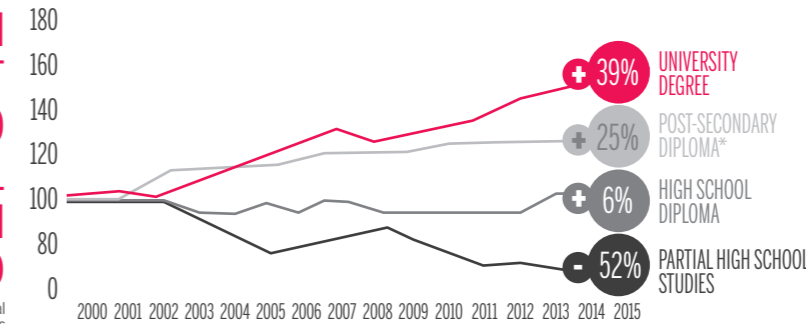
UNIVERSITY RESEARCH BY 50 LARGEST UNIVERSITIES, BY CMA

2014-2015, in millions of dollars
Sources: Montreal International, KPMG analysis



GROWTH IN EMPLOYMENT ACCORDING TO HIGHEST LEVEL OF EDUCATION ACHIEVED

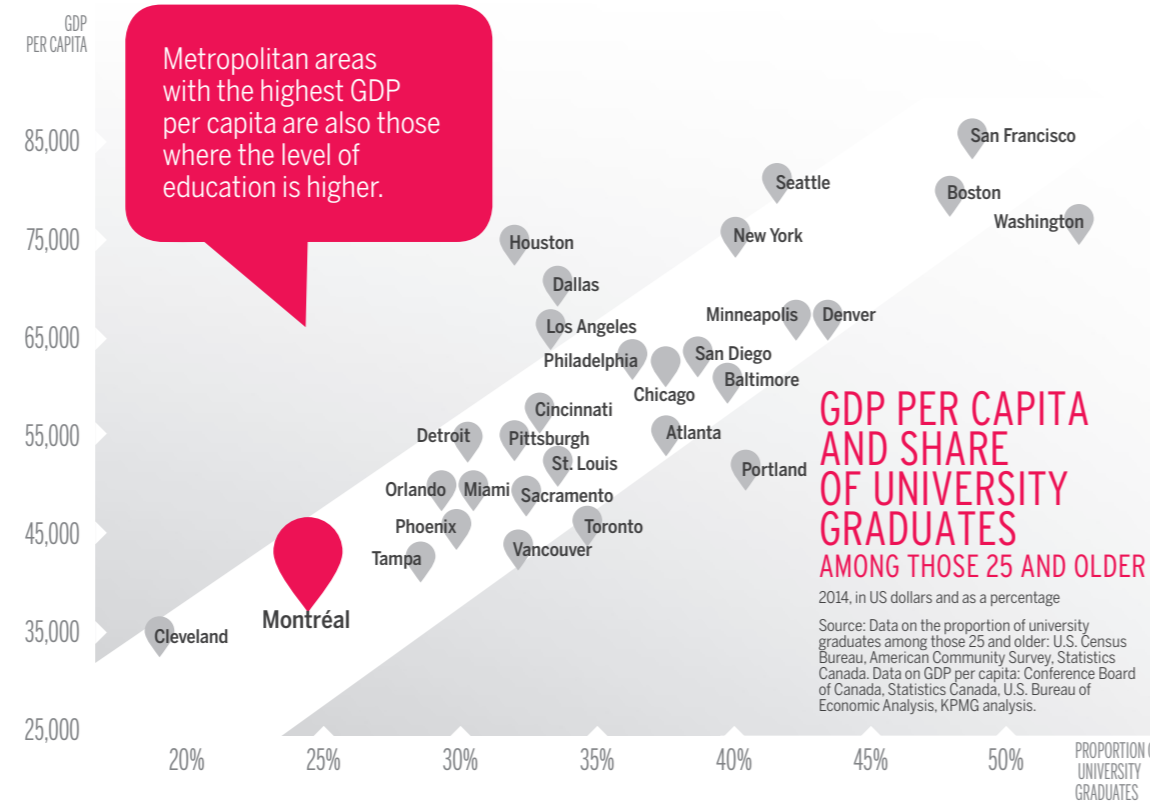
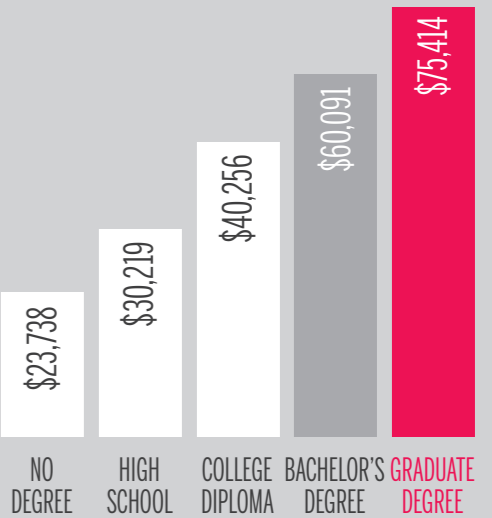
2000-2015, 2000=100. CMA of Montréal
Sources: Statistics Canada, KPMG analysis



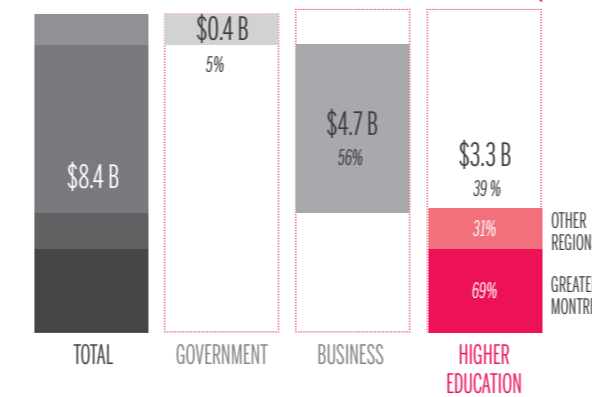
Employment is growing in advanced economies only for **highly skilled** people.

AVERAGE PRE-TAX INCOME ACCORDING TO HIGHEST DEGREE OBTAINED

2014, Québec
Sources: Statistics Canada, KPMG analysis



40% of R&D spending in Québec in 2013 was by universities.



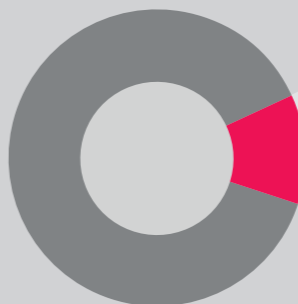
SPENDING ON RESEARCH AND DEVELOPMENT IN QUÉBEC, BY SECTOR

2013, in billions of dollars and as a percentage of total intramural expenditures
Sources: Institut de la statistique du Québec, KPMG analysis

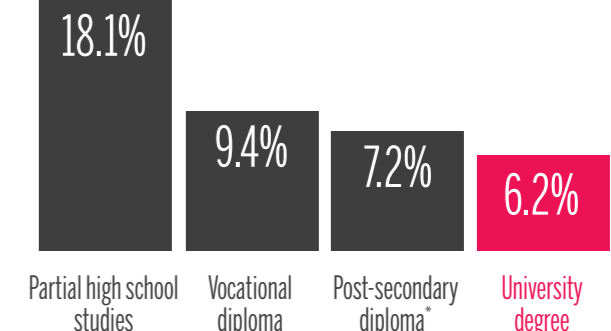
\$22.7 B



Contribution by all university graduates to growth in GDP in Greater Montréal in 2014-2015.



12%
of its GDP.



UNEMPLOYMENT RATE ACCORDING TO HIGHEST DEGREE OBTAINED

2015, Montréal
Sources: Statistics Canada, KPMG analysis

* Includes those with a college diploma, a vocational diploma, a university certificate or undergraduate degree, short program.