

ED28.1

MaRS Discovery District

2018

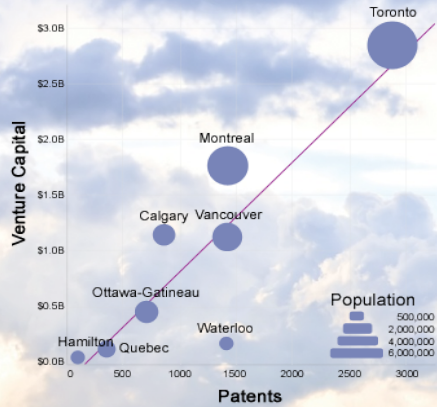
Yung Wu
CEO

Cory Mulvihill
Lead Executive, Policy & Public Affairs

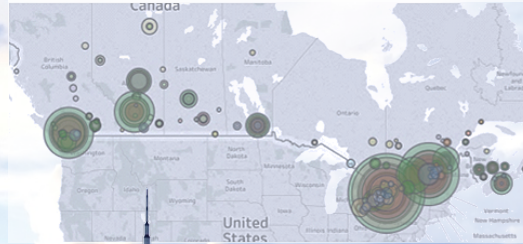
MaRS

TORONTO AS A HUB FOR CANADA'S CONVERGENT INNOVATION

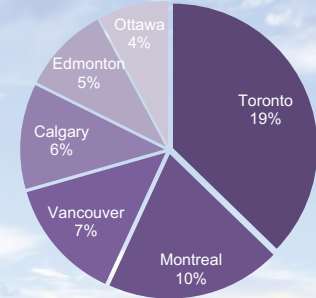
Strongest Patenting and VC Investment in Canada



Most Diversified Economy + Largest Industry Clusters



Greatest Concentration of Canadian GDP



2X the job growth rate
of Canada 2010-2015

400,000 technology employees

Sources: Stats Canada & Brookings Institute Global City GDP 2014; TechToronto / Statistics Canada; University of Toronto; OECD patent cooperation treat and Thomson Reuters

NORTH AMERICA'S LARGEST URBAN INNOVATION HUB.

MaRS

1.5 million sq ft

Direct subway & streetcar
access

150+ Total Tenants

100+ Startup Tenants

Convening innovators with
financial, academic &
business communities

SELECT MARS CENTRE TENANTS BRINGING THE INNOVATION ECOSYSTEM TOGETHER

START UPS



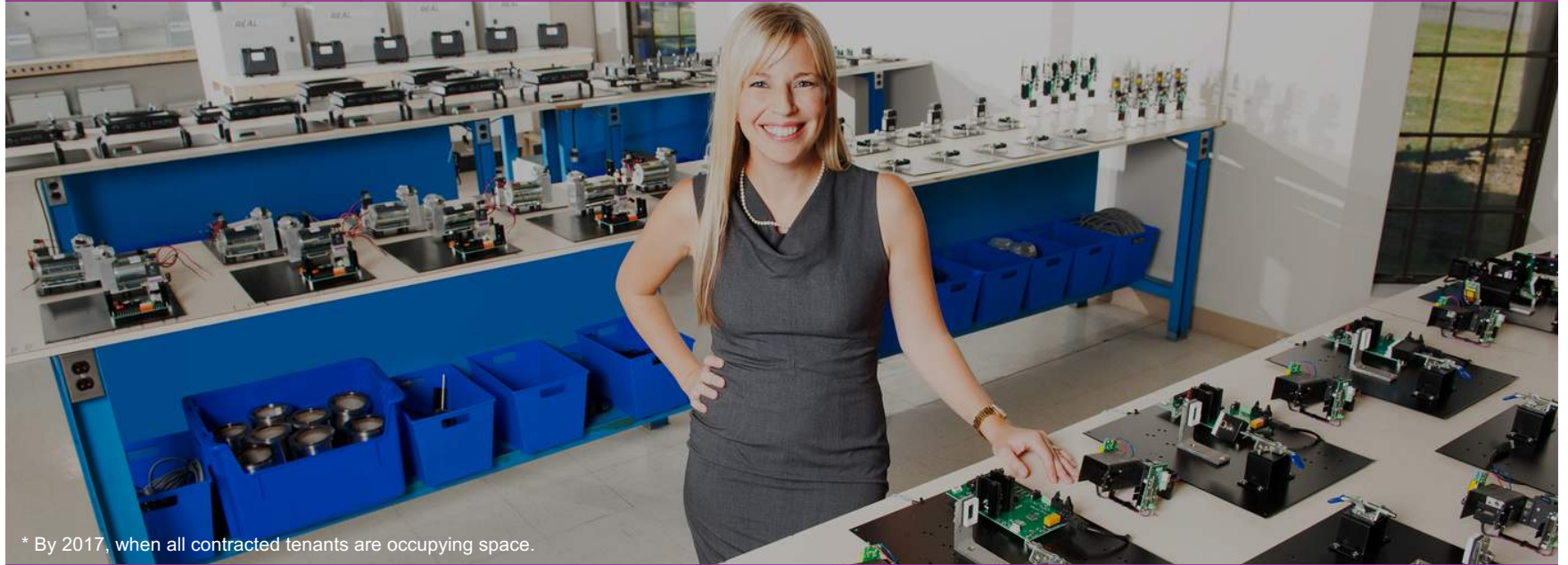
CORPORATIONS, CAPITAL & SERVICE PROVIDERS



ECOSYSTEM PARTNERS (PUBLIC)



LIFE @ MaRS TODAY



* By 2017, when all contracted tenants are occupying space.

2,000+

Annual Events
and Meetings

150,000

Annual
Attendees

200

Annual International
Delegations

6,000

People
at Work

ATTRACTING THE INNOVATORS WHO WILL CHANGE THE WORLD .

MaRS supports innovators who want to achieve strong business results and / or make a positive difference in the world - we identify them by these criteria:

IMPACT – They address big challenges facing Canada and the world

MARKET DEMAND – They have major global market opportunities, consumers not well served by current solutions

DISRUPTION – Exponential acceleration driven by science and technology, digitization and connectivity across converged sectors and disciplines

ASSETS AND EXPERTISE – Toronto, and Canada, are (or can be) centres of excellence



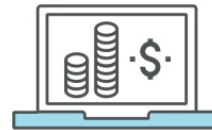
Health

- Biotech & Pharma
- Health & Wellness
- Digital Health
- Medical Devices & Diagnostics



Energy & Environment

- Energy
- Agritech
- Adv. Materials
- Adv. Manufacturing
- Transportation
- Waste Mgmt.
- Water



Finance & Commerce

- AI, Data, & Analytics
- Alt. Finance
- Cybersecurity
- Insurance Tech
- Marketplaces
- Online & Mobile Retail
- Payments
- Retail Tech



Work & Learning

- Business Intelligence
- Education & Training
- HR & Workforce
- Enterprise Software

MaRS-SUPPORTED VENTURES ARE DRIVING RESULTS .

**RAISED CAPITAL EQUIVALENT TO 1/3
OF ALL REPORTED VC CAPITAL IN ONTARIO IN 2016***

\$3.5 Billion

raised since 2008

\$1.8 Billion

generated since 2008
(majority from exports)

**MaRS VENTURES HAVE CONTINUED TO BUILD
STRONG REVENUE TRACTION**

* In 2016, CVCA recorded all VC funding to Canadian Ventures as \$3.2B of which Ontario based investments were \$1.5B.

MaRS CHAMPIONS AN INCLUSIVE INNOVATION ECOSYSTEM

MARS VENTURES BOAST ONE OF THE HIGHEST RATES OF FEMALE TECH FOUNDERS GLOBALLY

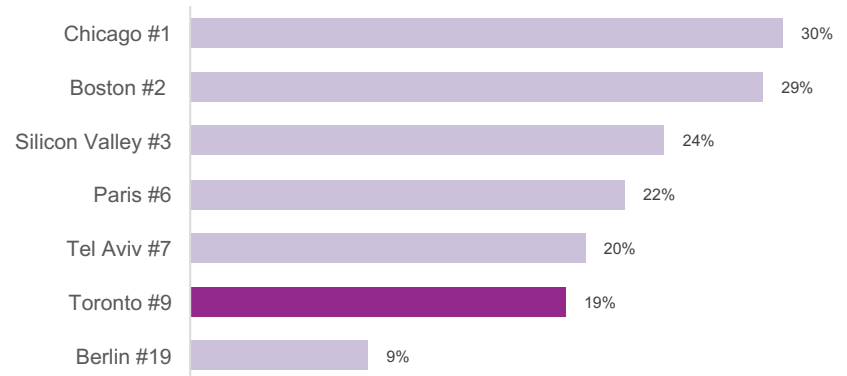
% of MaRS Ventures with at least one female founder



With 28% of MaRS Ventures having female founders, MaRS matches globally leading gender diverse tech ecosystems as reported by Startup Genome

Source: all venture numbers as reported in the 2012-2016 venture client annual survey. For details, see marsdd.com/survey-methodology

Startup Genome's 2015 Report Ranks major global ecosystems by % of women founders



Note: Startup Genome used a smaller sample set for Toronto that included ventures from other incubators and accelerators as well as MaRS (i.e. DMZ, CDL, OneEleven etc).

Source: Start UP Genome Compass Report, 2015. MaRS numbers as reported through 2016 Venture Client Survey Results

MaRS CHAMPIONS AN INCLUSIVE INNOVATION ECOSYSTEM

Founder demographics reflect the rich diversity of the city and experience, it continues to grow as the ecosystem matures

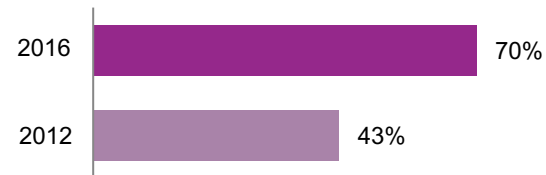
Diversity

% of MaRS Ventures with at least one Foreign-born Founder



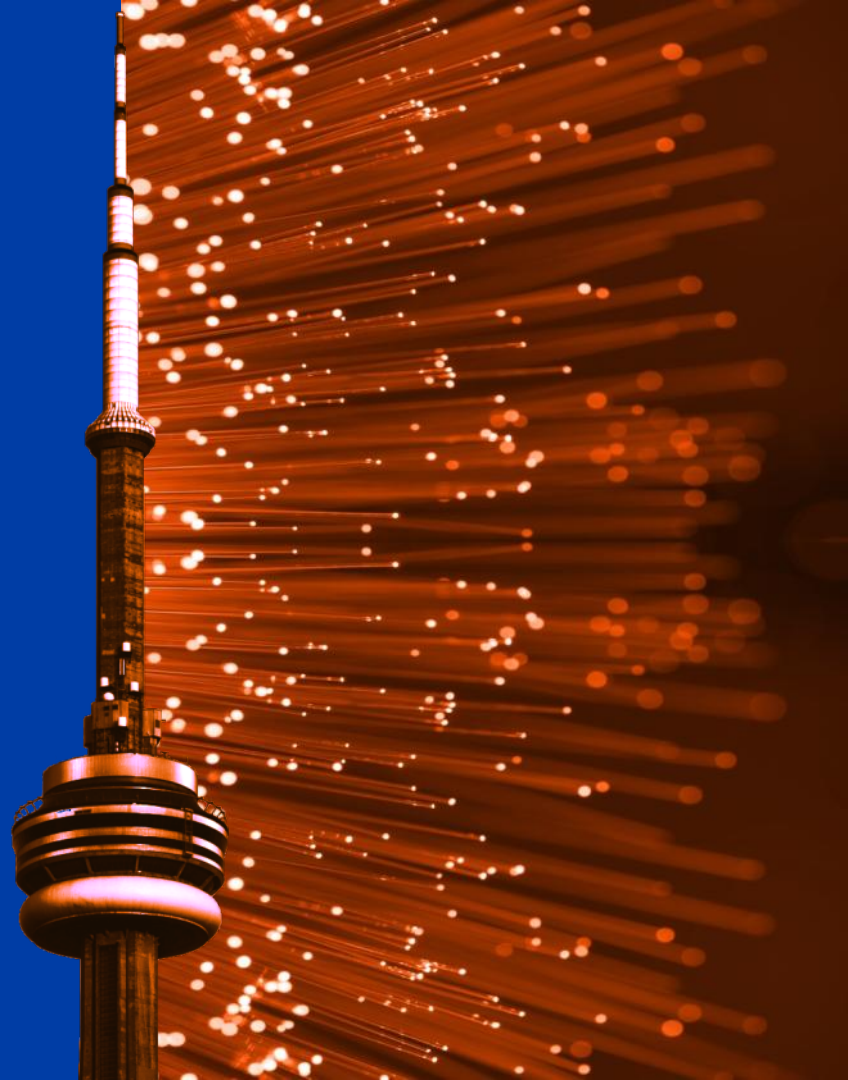
Founders with previous startup experience

% of MaRS Ventures with 1+ founder having founded previous startup



Source: all venture numbers as reported in the 2012-2016 venture client annual surveys.
For details, see marsdd.com/survey-methodology.

Our mission is to help ventures succeed by reaching diverse audiences in Toronto and around the world, creating new forms of content that will attract viewers and drive customers to the GTA's exciting ventures.



SUPPORTING THE ECOSYSTEM *

- **500+** stories involving members of the MaRS world
- **100+** entrepreneurs, venture capitalists, corporate partners and thought leaders
- Content partnership with **VICE**
- **3 digital magazines** distributed with the Toronto Star
- **2 special edition** magazines distributed with the Globe and Mail





MaRS

MaRS OVERVIEW

Thank you