TORONTO AS A HUB FOR CANADA’S CONVERGENT INNOVATION

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

2X the job growth rate of Canada 2010-2015

400,000 technology employees

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Strongest Patenting and VC Investment in Canada

Most Diversified Economy + Largest Industry Clusters

Greatest Concentration of Canadian GDP

- Toronto: 19%
- Montreal: 10%
- Vancouver: 7%
- Calgary: 6%
- Edmonton: 5%
- Ottawa: 4%

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**400,000 technology employees**

**2X the job growth rate of Canada 2010-2015**
NORTH AMERICA’S LARGEST URBAN INNOVATION HUB.

1.5 million sq ft
Direct subway & streetcar access
150+ Total Tenants
100+ Startup Tenants
Convening innovators with financial, academic & business communities
<table>
<thead>
<tr>
<th>START UPS</th>
<th>CORPORATIONS, CAPITAL &amp; SERVICE PROVIDERS</th>
<th>ECOSYSTEM PARTNERS (PUBLIC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>fds</td>
<td>Live Labs</td>
<td>Grand Challenges Canada</td>
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<tr>
<td>Ecopia</td>
<td>CIBC</td>
<td>Grants Défis Canada</td>
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<tr>
<td>Northern Biologics</td>
<td>BDC</td>
<td>BIOSCIENCE</td>
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<tr>
<td>Alpha Cancer Technologies</td>
<td>Samsung</td>
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<td>circleci</td>
<td>Latin League</td>
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<tr>
<td>kik</td>
<td>Emerald Technology Ventures</td>
<td>Ontario Institute for Genomics</td>
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<tr>
<td>League</td>
<td>Real Ventures</td>
<td>Ontario Cancer Institute</td>
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<tr>
<td>HIGHLAND THERAPEUTICS</td>
<td>BioLight</td>
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<td>VALIDERE</td>
<td>Emergent BioALL</td>
<td>Vector Institute</td>
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<td>Arctic</td>
<td>MolecuLight</td>
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<tr>
<td>Group of Companies</td>
<td>Parametric Human Project</td>
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<tr>
<td>Woodland Biofuels Inc.</td>
<td>waterless</td>
<td>CIFAR</td>
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<tr>
<td>TriPhase</td>
<td>RBC</td>
<td>University Health Study</td>
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<td>Taplytics</td>
<td>RBC Financial Group</td>
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<td>deep</td>
<td>Cycle Capital Management</td>
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<td>genomics</td>
<td>LOF</td>
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</table>
LIFE @ MaRS TODAY

2,000+
Annual Events and Meetings

150,000
Annual Attendees

200
Annual International Delegations

6,000
People at Work

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

Source: all venture numbers as reported in the 2008-2016 venture client annual surveys. For details, see marsdd.com/survey-methodology. CVCA_2016 MarketOverview
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>2016</td>
<td>28%</td>
</tr>
<tr>
<td>2012</td>
<td>22%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Ecosystem</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Chicago #1</td>
<td>30%</td>
</tr>
<tr>
<td>Boston #2</td>
<td>29%</td>
</tr>
<tr>
<td>Silicon Valley #3</td>
<td>24%</td>
</tr>
<tr>
<td>Paris #6</td>
<td>22%</td>
</tr>
<tr>
<td>Tel Aviv #7</td>
<td>20%</td>
</tr>
<tr>
<td>Toronto #9</td>
<td>19%</td>
</tr>
<tr>
<td>Berlin #19</td>
<td>9%</td>
</tr>
</tbody>
</table>

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

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: Startup Genome Compass Report, 2015. MaRS numbers as reported through 2016 Venture Client Survey Results.
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**
  - 2016: 56%
  - 2013: 42%

### Founders with previous startup experience

- **% of MaRS Ventures with 1+ founder having founded previous startup**
  - 2016: 70%
  - 2012: 43%

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 OVERVIEW

Thank you