



Appendix D

Market Intelligence service delivery case studies:

Case Study #1: Consumer products

Company Description

Company is developing an educational app that teaches kids storytelling through a gamified experience. A mobile application, the objective of the company is assist parents and educators combine play and learning experiences.

Ask

Company was seeking market research to achieve two milestones:

- Pitch deck for investor presentation
- Refine MVP

The specific information requested was:

- Market size of educational gaming sector in North America
- Business models for educational toys
- Tablets and smartphones adoption rates and trends for North America.
- Parent's toys purchasing habits and kids play habits

The Response

Hi _____,

Thanks for reaching out to MaRS Market Intelligence.

These are the reports that I found for you in our databases and in the open web. We have more reports that might be useful to you but I didn't want to bombard you more than I already have. Once you've had a chance to digest this information, please submit a new request and I'd be happy to send along more subject-specific reports.

Please keep in mind that there is some overlap between the reports. I recommend you to scan these documents to get a better sense of the info provided.

Market reports

eMarketer - Canada Mobile - 2012.pdf

IBIS - Number of children aged 9 years and younger - 2012.pdf

IBIS - Private Schools in the US Industry Report - 2012.pdf

WEB – Joan Ganz Cooney Center – iLearn II: An analysis of the education category of Apple app store - 2012.pdf

WEB - Canada Year Book 2011 - 2012.pdf

WEB - CEA A Canadian Perspective - 2010.pdf

WEB - GSV Education Sector Factbook - 2012.pdf

WEB - Pew Tablets and e-readers ownership - 2012.pdf

WEB - StatsCan Canadian Population and sex - 2011.pdf

WEB - Unesco-Global Education Digest - 2012.pdf

Check Xyologic Mobile Analysis for more details regarding iPad apps: <http://xyo.net/ipad-publishers/education/>

Business model

eMarketer - App-etite for Engagement Marketing Beyond the Browser - 2012.pdf

eMarketer - Canada Mobile Marketers Take Aim at a Moving Target - 2012.pdf

eMarketer - iAd Provides Traction for New Land Rove Customers - 2012.pdf

Factiva - Educational toys - 2012.pdf

Forrester - Build Great mobile Apps That Drive Engagement - 2011.pdf

Forrester - How To start Bridging The mobile monetization gap - 2012.pdf

Forrester - Subscription and Recurring Billing Solutions - 2012.pdf

Forrester - Building Mobile Apps - Start With Web Move To Hybrid - 2012.pdf

GMID - Scientific educational toys market forecast - 2012.xls

GMID - Toys and Games Trends Developments and Prospects - 2012.pdf

GMID - Toys and Games in Canada - 2012.pdf

GMID - Toys and Games in the US - 2012.pdf

IDC - Worldwide and U.S. Mobile Applications Download and Revenue 2012–2016 Forecast The Appification of Everything Goes Global - 2012.pdf

IDC - Worldwide and U.S. Mobile Applications, Storefronts, Developer, and In-App Advertising
2011–2015 Forecast Emergence of Postdownload Business Models - 2012.pdf

Play habits

eMarketer - Children and Teens Who Have Read a Book on a Digital Device - 2010.pdf

eMarketer - Demographic Profile Children - 2011.pdf

eMarketer - Tablet Activities of US Children According to Their Parents - 2011.pdf

Simba - Going Mobile in the PreK-12 School Market - 2011.pdf

To access these documents, please click on the link:

<http://dropbox.marsdd.com/Claudio/XXXX/sources.zip>

****Please note, this link automatically expires in 10 days****

I hope some of the above proves useful to you. _____, could you kindly acknowledge receipt of this email?

Feel free to get in touch if you have any questions; please copy your advisor in any correspondence. MaRS is pleased to provide market intelligence resources and services at no cost; the approximate value of the attached resources is \$41,289.00.

Please remember that as per our terms of service the resources are provided for your internal use only and may not be shared with anyone outside your organization. If you intend to use any of the data charts as is from the reports in any presentations or investor pitch decks please reference the source accurately and seek approval from the vendors directly.

Kind regards,

Claudio Munoz

Information Specialist – MaRS Market Intelligence

Case Study #2: e-Commerce

Company Description

Company is developing an e-commerce platform for exclusive fashion products that users can browse and purchase online. Designer can

Ask

Company was seeking market research to achieve two milestones:

- Pitch deck for investor presentation
- Complete Business plan
- Refine MVP

The specific information requested was:

- Consumer spending on fashion in North America?
- Number of graduates from fashion design schools in North America
- How many businesses in the fashion industry have less than 5 employees in North America?
- How many people have made a purchase online on clothing or accessories in North America? (for example: x%of the total online population)
- What is the forecasted growth in online traffic and spend to the fashion retail segment over the next 3 years in Canada and US?
- What are the trends of “independent fashion”, “crowdfunding” with retail fashion consumers?
- What is the monthly UV online traffic for the fashion retail segment in Canada, US and UK?
- What is the demographic data of visitors to online retail fashion sites in Canada and US?
- What is the return frequency of online fashion retail website visitors (visits for each unique visitor)?
- What is the average visit length of visitors to online fashion retail websites per month?

The Response

Hi _____,

Thanks for reaching out to MaRS Market Intelligence. This is what I could find for you.

Please keep in mind that there is some overlap between the reports. I recommend you to scan these documents to get a better sense of the info provided.

Apparel

Gmid - Apparel in Canada - 2012.pdf

Gmid - Apparel in the US - 2012.pdf

Gmid - Apparel Specialist Retailers in Canada - 2012.pdf

Gmid - Apparel Specialist Retailers in the US - 2012.pdf

S&P - Industry Survey Apparel and Footwear - 2012.pdf

S&P - Industry Survey Apparel and Footwear (comparison) - 2012.xls

Apparel online stats

comScore - Competitors (Apparel) Key Measures - March 2013.xls

comScore - Retail Apparel Canada Key Measures January 2013 (3 Mo AVG).xls

comScore - Retail Apparel US Key Measures March 2013 (3 Mo AVG).xls

FashionStakeInc

Capital IQ - FashionStakeInc_PrivateCompany - 2013.pdf

Consumers

Miller (MR) - Consumer Behavior 2013 - 2012.pdf

Crowdfunding

Gartner - Crowdfunding Needs Marketing - 2012.pdf

WEB - Crowd Funding Industry Report Abridged - 2012.pdf

WEB - L&C-Crowdfunding from A to Z - 2012.pdf

e-Commerce

eMarketer - Canada Ecommerce Vendors Compete and Innovate to Deliver Better Ecommerce Experiences - 2012.pdf

eMarketer - Canada Retail eCommerce Forecast Measured Growth Ahead - 2011.pdf

eMarketer - Online User Reviews-Building Trust and Boosting Sales - 2013.pdf

eMarketer - UK B2C Ecommerce-Mobile Takes Center Stage - 2012.pdf

eMarketer - US Retail Ecommerce Forecast and Comparative Estimates - 2013.pdf

eMarketer - Worldwide B2C Ecommerce Forecast-Midyear - 2012.pdf

Forrester - The Forrester Wave™ B2C Commerce suites Q3 2012 - 2012.pdf

Forrester - The state of retailing online 2011 Merchandising headcount and global strategies - 2011.pdf

Fashion designers

IBIS - Fashion Designers in the US industry report - 2012.pdf; also available here

http://www.bls.gov/spotlight/2012/fashion/pdf/fashion_bls_spotlight.pdf

WEB - BLS Fashion Designers Occupational Outlook Handbook - 2013.pdf ; more info here

<http://www.bls.gov/ooh/arts-and-design/fashion-designers.htm>

WEB - BLS Spotlight on Statistics Fashion - 2013.pdf

In Canada: http://www.ic.gc.ca/eic/site/026.nsf/eng/h_00070.html

To access these documents, please click on the link:

http://dropbox.marsdd.com/Claudio/_____/sources.zip

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I hope some of the above proves useful to you. _____, could you kindly acknowledge receipt of this email?

MaRS is pleased to provide market intelligence resources and services at no cost; the approximate value of the attached resources is \$20,195.

Please remember that as per our terms of service the resources are provided for your internal use only and may not be shared with anyone outside your organization. If you intend to use any of the data charts as is from the reports in any presentations or investor pitch decks please reference the source accurately and seek approval from the vendors directly. This is particularly important for Gartner, IDC and Forrester data sources.

Kind regards,

Claudio Munoz

Information Specialist – MaRS Market Intelligence

Case study #3: Digital Health

Company Description

Company is startup in mobile electronic health records, enabling everyone to track their health using a mobile device and make decisions on when to seek medical attention or preventative care

Ask

Company was seeking market research to achieve two milestones:

- To develop a launch strategy
- To complete a pitch deck for investors presentations

The specific information requested was:

- What is the number of individuals hospitalized due to asthma and other respiratory disorders?
- What are the numbers of iPads and iPhones in use in Canada?
- Is there a list of medical device manufacturers in Canada/US?
- What are trends and best practices of treating and controlling asthma and other respiratory diseases?

The Response

Hi _____,

My name is Hadi Salah and I am the Senior Industry Analyst for life sciences and healthcare at MaRS Market Intelligence. I have had the chance to do some research on your request.

For Asthma hospitalization stats and trends/best practices for treating asthma and other respiratory illnesses, check out the following reports (Attached):

- BCC Research: Global Markets for Asthma and COPD Drugs 2010
- Business Insights: The Asthma, COPD & Allergic Rhinitis Market Outlook 2016
- Business Insights: The Respiratory Diagnostic Devices Market Outlook to 2016
- Frost & Sullivan: US Asthma/COPD Market 2011
- Kalorama: The World Market for Respiratory Devices

I have also found the following public resources to be insightful. Check out the following for quick stats:

<http://www.aafa.org/display.cfm?id=8&sub=42>

http://www.phac-aspc.gc.ca/publicat/meas-haut/mu_s-eng.php

<http://www.cdc.gov/nchs/data/databriefs/db94.pdf>

<https://www.aaaai.org/about-the-aaaai/newsroom/asthma-statistics.aspx>

Although I do not have access to any database listing manufacturers of medical devices. I did find these links online that might give you direction:

<http://www.mpo-mag.com/articles/2006/07/top-medical-device-companies-report>

<http://www.medec.org/content/members-list>

http://www.ic.gc.ca/eic/site/lsg-pdsv.nsf/eng/h_hn01736.html

http://www.manta.com/world/North+America/Canada/surgical_and_medical_instruments_and_apparatus—D1349/

Smartphone/iPad/iPhone use in Canada can be found in the following reports (Attached):

- eMarketer: Canada Mobile 2012
- Ipsos: Our Mobile Planet – Canada 2012 (public source)

Please review the material with your advisor, and do let me know if you have any questions – I'm happy to help.

MaRS is pleased to provide market intelligence resources and services at no cost; the approximate value of the attached resources is **\$30,870.00**. Please remember that as per our terms of service the attached resources are provided for your internal use only and may not be shared with anyone outside your organization. If you intend to use any of the data charts as is from the reports in any presentations or investor pitch decks please reference the source accurately and seek approval from the vendors directly. This is particularly important for Gartner, IDC and Forrester data sources.

Best regards,

Hadi

Industry Analyst | Life Sciences & Healthcare | MaRS Market Intelligence

Case Study #4: Manufacturing

Company Description

The startup is developing a rapid prototyping machine that incorporates 3D printing, laser etching, and a CNC router.

Ask

Company was seeking market research to achieve two milestones:

- To fine tune their patent strategy
- Understand their market locally and internationally
- Develop an export strategy

The specific information requested was:

For the following products: Manual Tool Change CNC machines, CNC Laser Tables, 3D Printers, and general manufacturing

- What is the market size and growth trends for Manual Tool Change CNC Routers, Auto Tool Change CNC Routers, CNC Plasma Routers, CNC Laser Tables, and 3D Printers?
- Are there any significant export trends?
- What does the competitive landscape look like, and how large is the competition (revenues)?
- What are the key manufacturers/suppliers of components?

The Response

Hi ____,

Great chatting earlier. I've scoured our databases for information and found the following relevant reports (attached):

Frost & Sullivan: Advances in Laser for Manufacturing 2013

Frost & Sullivan: Strategic analysis of the European CNC Machine Tool Market 2012

Frost & Sullivan: Tech Insights Process Control 3D Printing 2013

Frost & Sullivan: Tech Insights Process Control Smart systems in manual and automation 2010

Frost & Sullivan: Top techs in advanced manufacturing and automation 2013

IBISWorld: Machine Shop Services in the US industry report

In terms of finding manufacturers/suppliers, we do not have access to lists of directories. I recommend that you take a look at the following B2B engineering websites:

<http://www.thomasnet.com/>

<http://www.globalspec.com/>

<http://ca.kompass.com/>

<http://www.alibaba.com/>

<http://www.sourcetool.com/>

<http://www.macraesbluebook.com/>

Export and Trade:

<http://www5.statcan.gc.ca/bsolc/olc-cel/olc-cel?lang=eng&catno=11-621-M2012090>

More from Statistics Canada:

<http://www.statcan.gc.ca/pub/11f0027m/11f0027m2010063-eng.htm>

<http://www.statcan.gc.ca/pub/65-001-x/65-001-x2013005-eng.pdf>

You can dig around Statistics Canada and Industry Canada for more useful information.

Please let me know if you found this information helpful.

MaRS is pleased to provide market intelligence resources and services at no cost; the approximate value of the attached resources is \$31,650.00 CAD.

Please remember that as per our terms of service the attached resources are provided for your internal use only and may not be shared with anyone outside your organization. If you intend to use any of the data charts as is from the reports in any presentations or investor pitch decks please reference the source accurately and seek approval from the vendors directly. This is particularly important for Gartner, IDC and Forrester data sources.

Lynda O'Malley, MES

Research Analyst | Cleantech Sector

Case Study #5: Cleantech

Company Description

The startup produces high value liquid fertilizers from low-cost, easily available agricultural residues. It does this by extracting and recycling nutrients from agricultural wastes at a fraction of the conventional liquid fertilizer production costs and energy consumption. The residual solids (biomass fibre), post nutrient extraction make a highly efficient fuel pellet.

Ask

Company was seeking market research to achieve two milestones:

- To complete an investor pitch presentation
- Complete due diligence on building a pilot plant

The specific information requested was:

- Market information on liquid fertilizers in Canada, U.S, and globally, including farm use, commercial landscaping, and domestic retail. We would like to know the size of these markets, number of players, name of the big players, pricing trends per unit of volume, market growth projections, typical margins in the production, typical mark-ups by retailers.
- Market information on fuel pellets in Canada, U.S, Europe, and East Asia. Size of market, market pricing, retail mark-up and market projections.
- Carbon-foot-print associated with the production of multi-nutrient liquid fertilizers such as Scotts Miracle-Gro, including GHG emissions, water, air, and other environmental foot-print data general to the industry or specific to any of the given products

The Response

Hi _____,

At the end of this email you will find a link to a dropbox that holds the below-mentioned resources.

Liquid fertilizers:

- Packaged Facts: Lawn and Garden Products & Services in the US 2011.
- Frost & Sullivan: Financial Assessment of Global Chemicals and Materials Industry 2013 (companies are profiled).
- Frost & Sullivan: Private Equity and Venture Capital Investments in Global Chemicals and Materials Industry 2013
- Frost & Sullivan: Strategic Analysis of the Biofertilizers Market in N America 2012
- BCC: Research: 2010 Chemicals Research Review Chapter 5 Agrochem Jan 2011
- BCC Research: Global Markets for Agrochemicals Jan 2010 (see for companies profiled)

- IBISWorld: Fertilizer Manufacturing in the US industry report (see for companies)
- IBISWorld: Price of Fertilizer 2012

Fuel Pellets, from our databases:

- Pike Research (Now Navigant Research): Biopower Markets and Technologies 2012
- BCC Research: Green Technologies and Global Markets Jan 2011

Fuel Pellets, from public resources:

- Pellet Fuels Institute: <http://www.pelletheat.org/>
- Ontario Ministry of Agriculture and Food, "Biomass Fuel Pellets Suppliers" <http://www.omafra.gov.on.ca/english/crops/resource/biomass-fuel.htm>.
- Ontario Fuel Pellet Opportunities Feb 5 2013, Wood Pellet Association of Canada: http://www.pellet.org/images/2013-02-05_Ontario_Fuel_Pellet_Opportunities.pdf.
- Canadian Biomass, "Canadian Biomass 2013 Pellet Map available" <http://www.canadianbiomassmagazine.ca/content/view/4035/57/>.
- Canadian Biomass, "Pellet Awakening" <http://www.canadianbiomassmagazine.ca/content/view/4040/63/>.
- Statistics Canada, "Results from Statistics Canada's Bioproducts and Development Survey 2009" <http://www.statcan.gc.ca/pub/88f0006x/2011001/part-partie1-eng.htm>.
- US EIA – Electric Power Monthly, January 2013, Net Generation from Biomass: http://www.eia.gov/electricity/monthly/epm_table_grapher.cfm?t=epmt_1_18_b.
- Europe – The European Biomass Association, AEBIOM Statistical Report: <http://www.aebiom.org/?p=6400#more-6400>.
- Europe – EUBioNet3, Solutions to overcome barriers in bioenergy markets in Europe Feb 2010, (attached)
- Europe – AEBIOM – A pellet road map for Europe: http://www.aebiom.org/wp/wp-content/uploads/file/Publications/BrochurePRME_LR.pdf.
- World Markets for Pellets <http://www.quebecwoodexport.com/biomasse/documents/stadlober.pdf>.
- IEA – Global Wood Pellet Industry Market and Trade Study: http://www.bioenergytrade.org/downloads/t40-global-wood-pellet-market-study_final.pdf.

Carbon Footprint (public resources)

- IEA – A Review of Greenhouse Gas Emission Factors for Fertiliser Production
[http://www.ieabioenergy-](http://www.ieabioenergy-task38.org/publications/GHG_Emission_Fertilizer%20Production_July2004.pdf)

[task38.org/publications/GHG_Emission_Fertilizer%20Production_July2004.pdf](http://www.ieabioenergy-task38.org/publications/GHG_Emission_Fertilizer%20Production_July2004.pdf).

From Yara, http://www.yara.com/doc/29413_Yara_carbon_life_cycle.pdf.

- Here, from an academic that appears favoured by the fertilizer industry:
<http://www.escholarship.org/uc/item/19f2h0p9#page-1>.

- From a blog – more for your information, perhaps not to use – I like the numbers:
<http://sustainablog.org/2009/07/putting-the-carbon-footprint-of-farming-in-perspective/>.

I have also attached a zip file containing that academic/scientific articles and magazine articles that contain valuable info to help answer your questions.

The resources listed above should help you to answer your questions. If you have any follow up questions, please feel free to get in touch, cc'ing your advisor in all communication.

MaRS is pleased to provide market intelligence resources and services at no cost; the approximate value of the attached resources is \$44,655.00 CAD.

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Lynda O'Malley, MES

Research Analyst | Cleantech Sector