

MARKETING

FROM LOW-TECH, HIGH-TOUCH
TO **HIGH-TECH, LOW TOUCH**

November 3, 2021

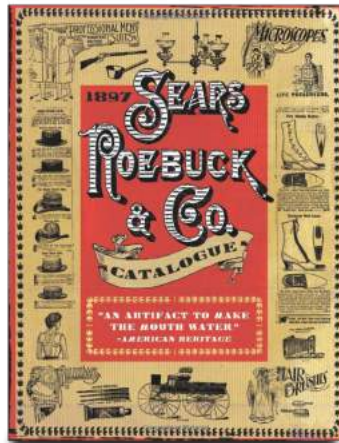


MARKETING

LOW TECH, HIGH TOUCH



Consumers shopped via stores and catalogues.



1900s

Companies promoted their brands primarily via print and radio.



1920s

Eventually companies promoted their brands via television.



1940s

MARKETING

RISE OF DIGITAL



Tim Berners-Lee and his team launched the World Wide Web.



1991

Internet penetration grew, jumping from 16 million to 70 million over 2 years.



1994

The launch of Amazon in 1994 marked the emergence of ecommerce. Consumers could now shop from home.



Search engines emerged. Google launched in 1998.



1998

With email communication came email marketing, and other engagement channels for marketers.



MARKETING

DECLINE OF PHYSICAL



From DVDs/CDs to
digital audio files



Rise of the digital
economy



Emergence of social
sharing



New modes of
communication brought new
advertising platforms,
marketing channels, and new
consumer behaviour trackers.

2000s

MARKETING

HIGH TECH, LOW TOUCH



The rise of smartphone adoption marks the beginning of constant connectivity.



Growing media fragmentation and more channels increase the complexity of marketing.



Online and mobile shopping begin to claim a larger proportion of retail sales.



Digital transformation & business innovation reduce the requirement for ownership & drive a shift from products to services.



Consumer data trails and corresponding data analytics are used to understand the customer journey.



Personalized content is delivered “right time, right place, right channel” at scale.



2007

MY STORY



1987

Brand Manager

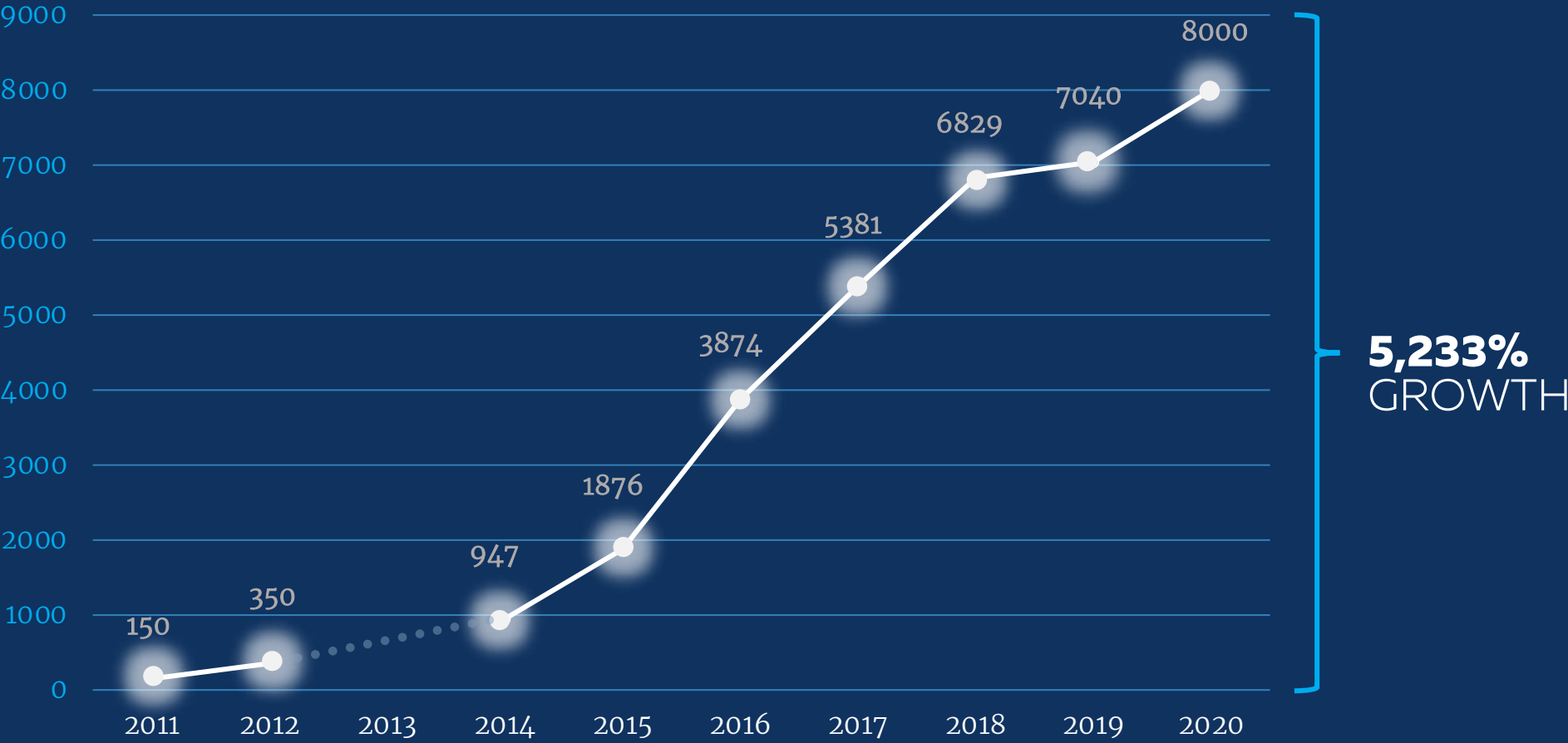


2017

Chief Marketing Officer

MARTECH INNOVATION

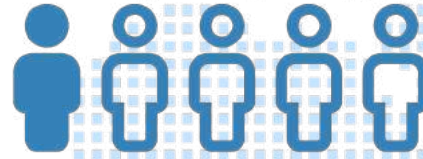
GROWTH OF MARTECH



GROWTH OF MARTECH



-8.7%
churn rate

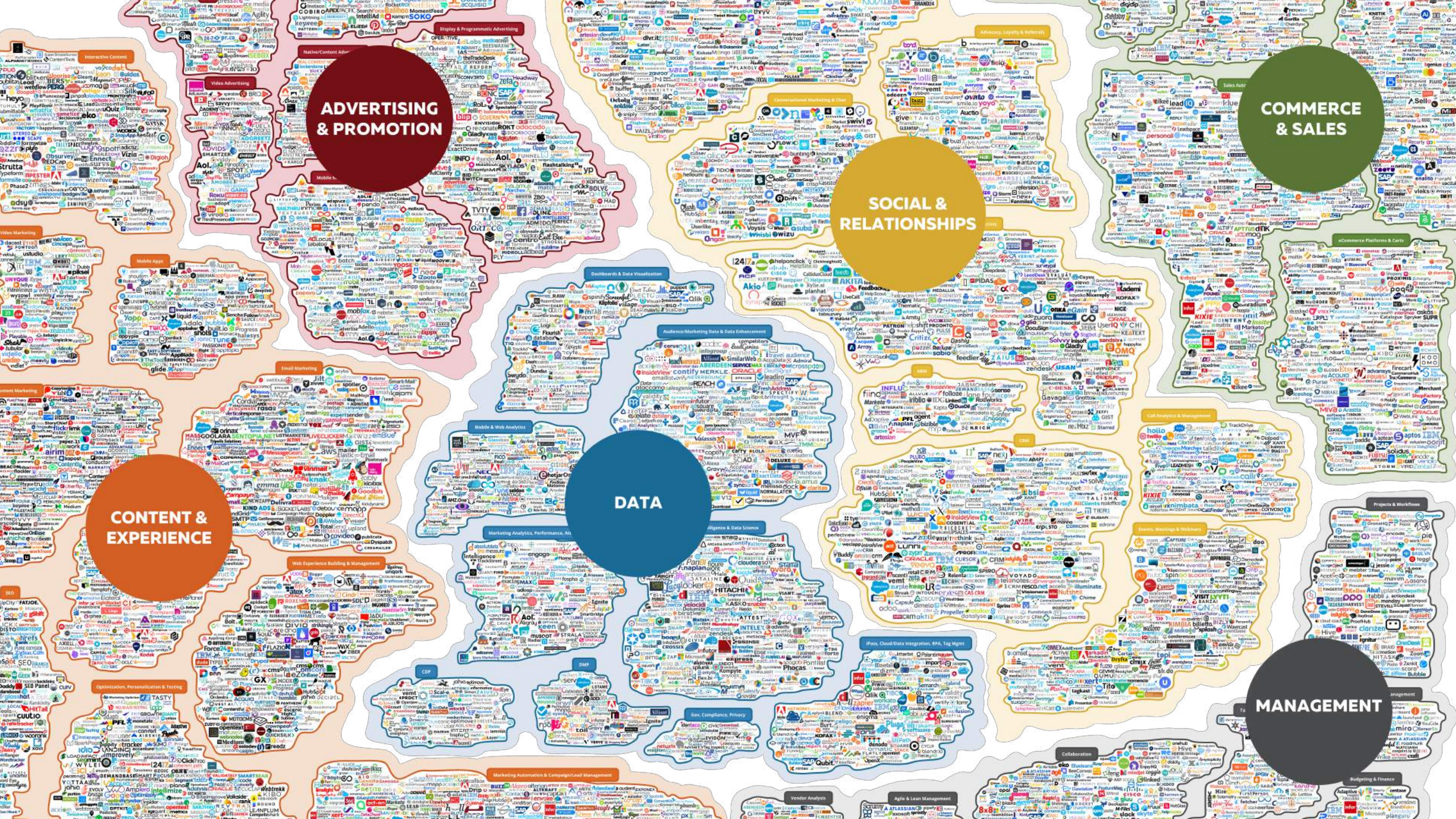


1 in 5
Solutions were not here
last year

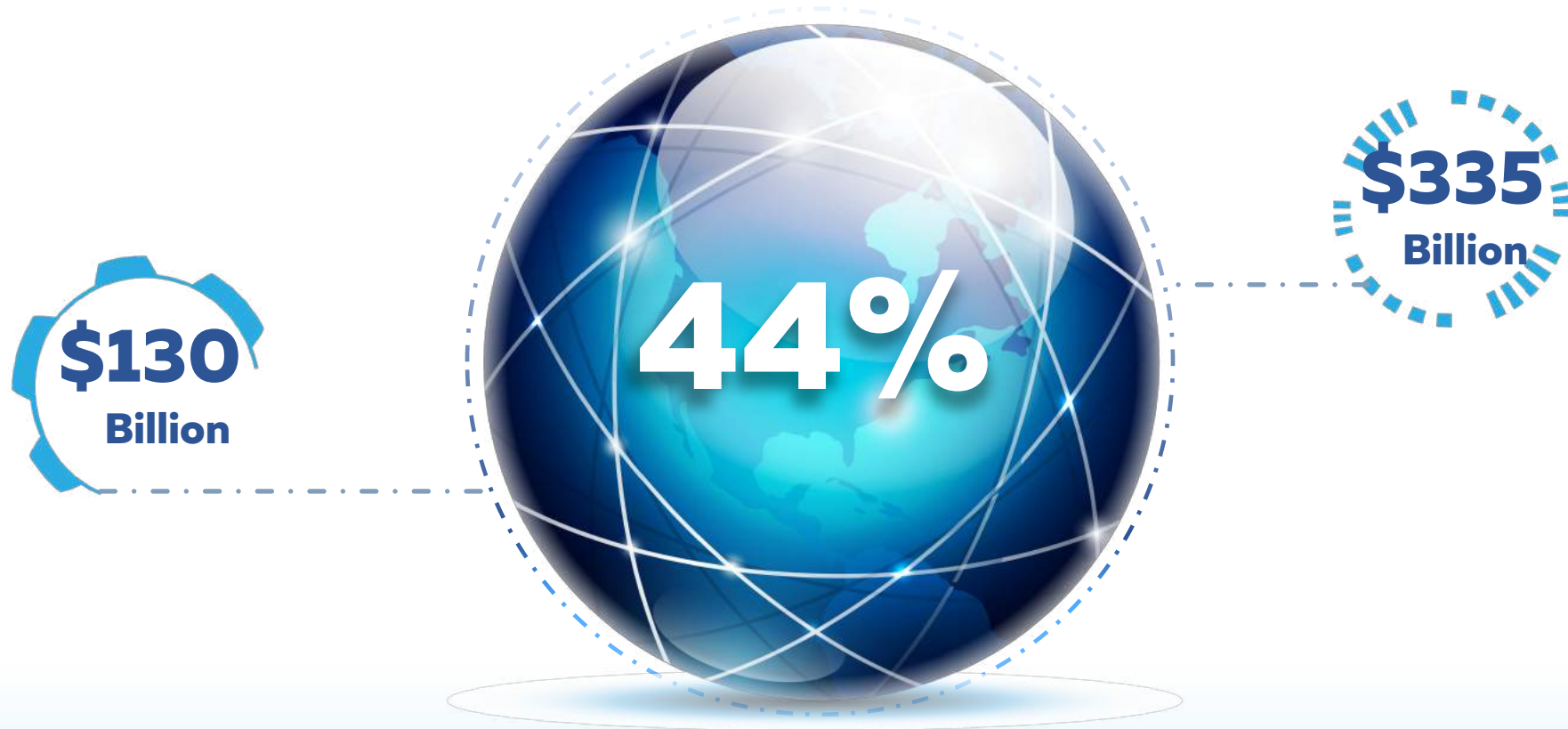


+1650%
growth

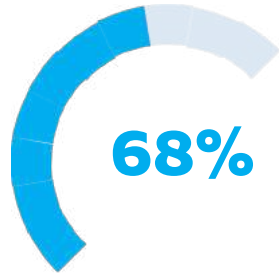




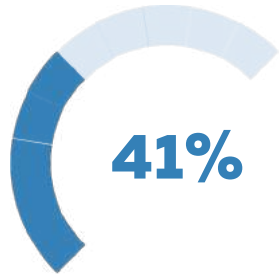
MARTECH **TODAY**



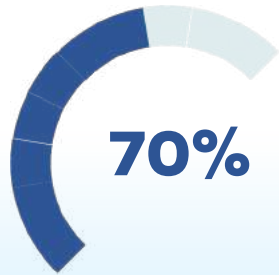
HIGHEST GROWTH SEGMENTS



**DATA, GOVERNANCE,
COMPLIANCE**



**WORKFLOW
MANAGEMENT**



**CONVERSATIONAL
MARKETING**



WHY



INDIVIDUAL CONNECTIONS



Boomers



Gen X

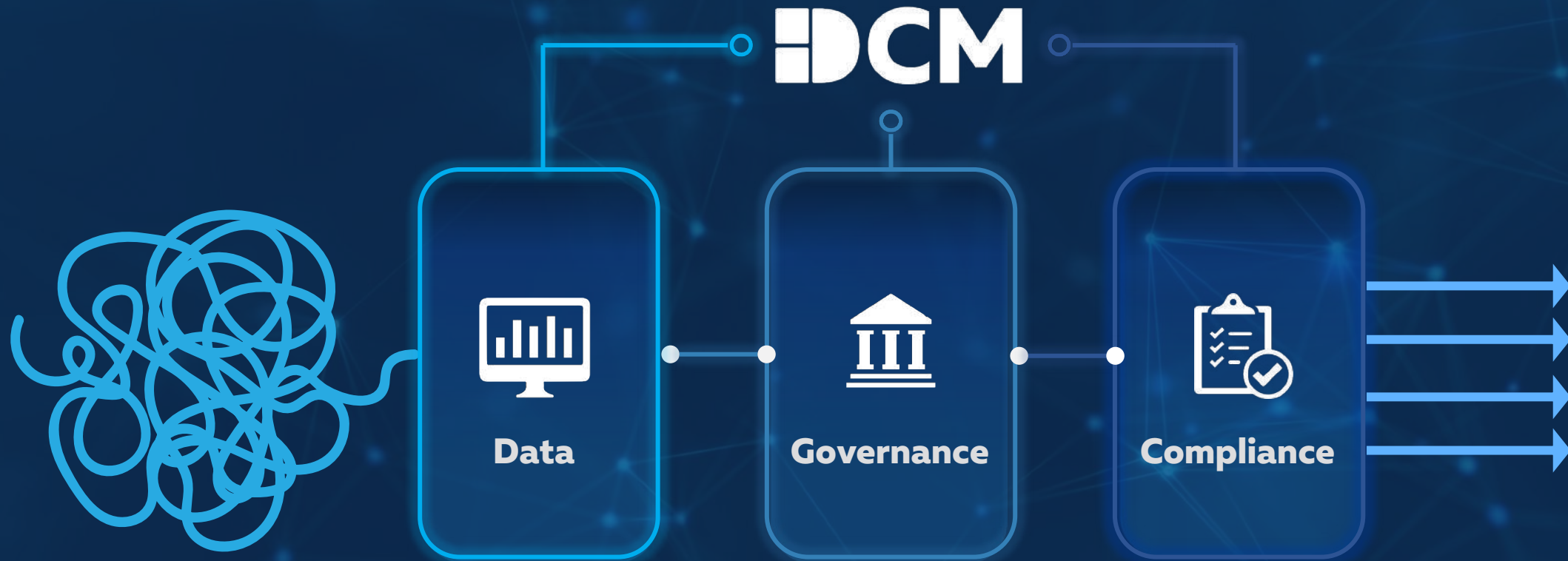


Millennials



Gen Z

COMPLEXITY



REDUCED WORKFORCE & INCREASING WORKLOAD



Marketing departments

A hand in a blue suit points towards the center of the image. The background is a dark blue digital interface with various elements: a world map, binary code, and several lists of categories. The central text 'CHANGING ROLE OF THE CMO' is in large, white, bold letters. The interface also features icons for search, settings, and a magnifying glass, along with a 'LOADING 100%' indicator and a 'WORLD' label with a map icon. The overall aesthetic is high-tech and futuristic.

WHO IS DCM?



PRINT FIRST



DIGITAL FIRST

64 years

WHY INVEST IN DCM?

INDUSTRY SECTOR CAGR: +2.24%*

**CONVENTIONAL
PRINT SOLUTIONS**

REVENUE: \$178M



*www.researchandmarkets.com

INDUSTRY SECTOR CAGR: +15%**

**TECH-ENABLED
MARKETING WORKFLOW**

REVENUE: \$78.6M



** Grandviewresearch.com

INDUSTRY SECTOR CAGR: +21.2%***

**DIGITAL ASSET MANAGEMENT
TECH-ENABLED SERVICE**

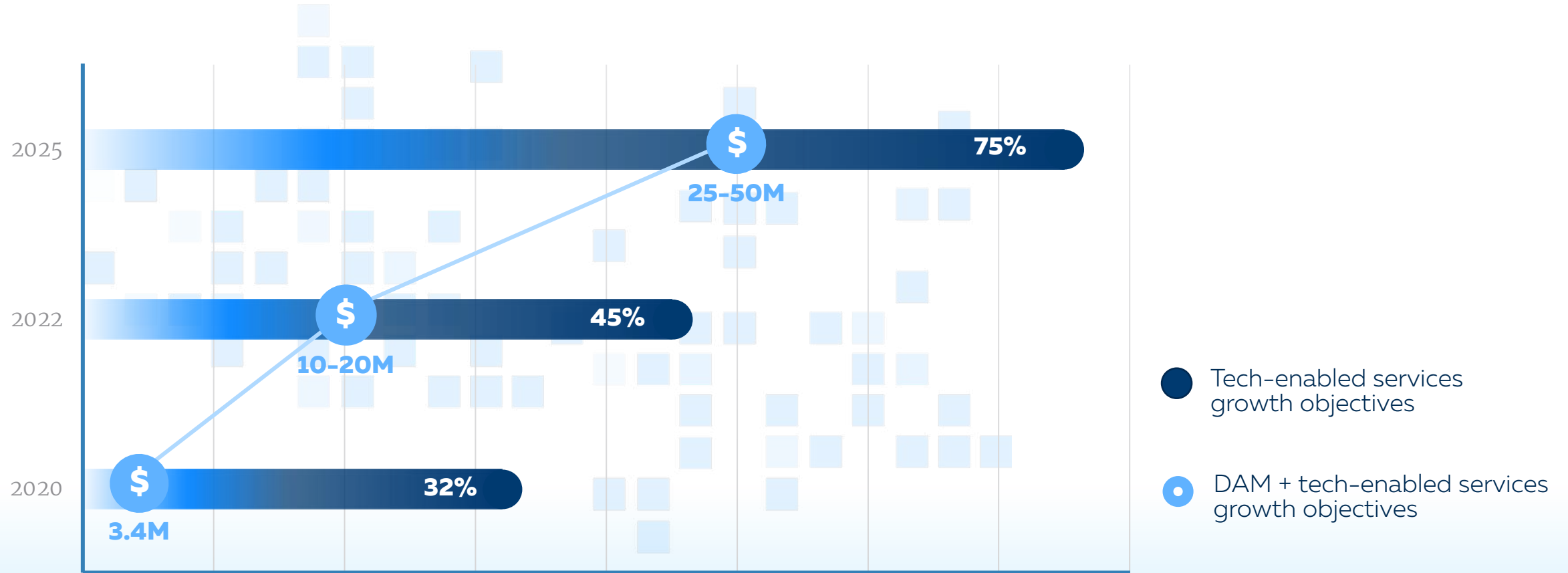
REVENUE: \$3.4M



***Global Digital Asset Management Market (2020 – 2025), Mordor Intelligence Industry Report

DCM is Canada's leading marketing and communications provider with over 1,000 employees serving 250+ corporate customers.

DIGITAL INNOVATION TO ACCELERATE REVENUE & MARKET GROWTH



REPAYMENT OF DEBT

A SIGNIFICANT PRIORITY



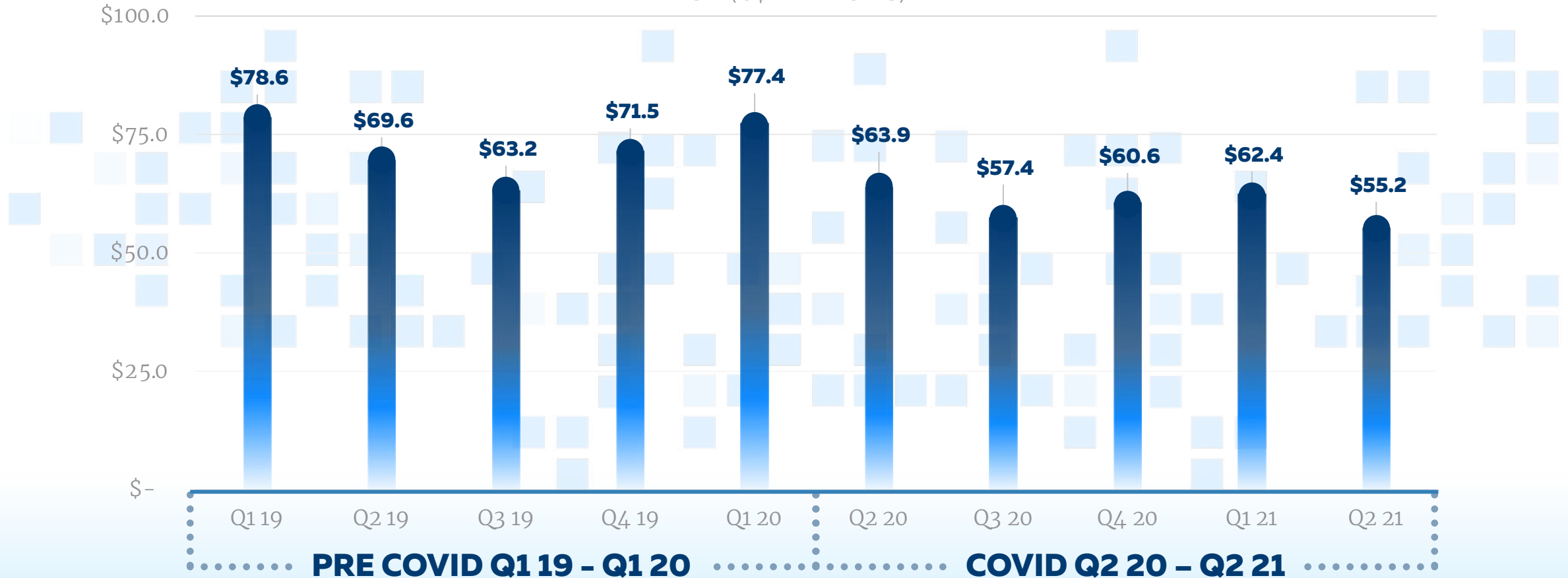
-50%
since fiscal 2019

POSITIONED FOR TOP-LINE GROWTH

AS CONSUMER MOVEMENTS RETURN TO PRE-COVID LEVELS

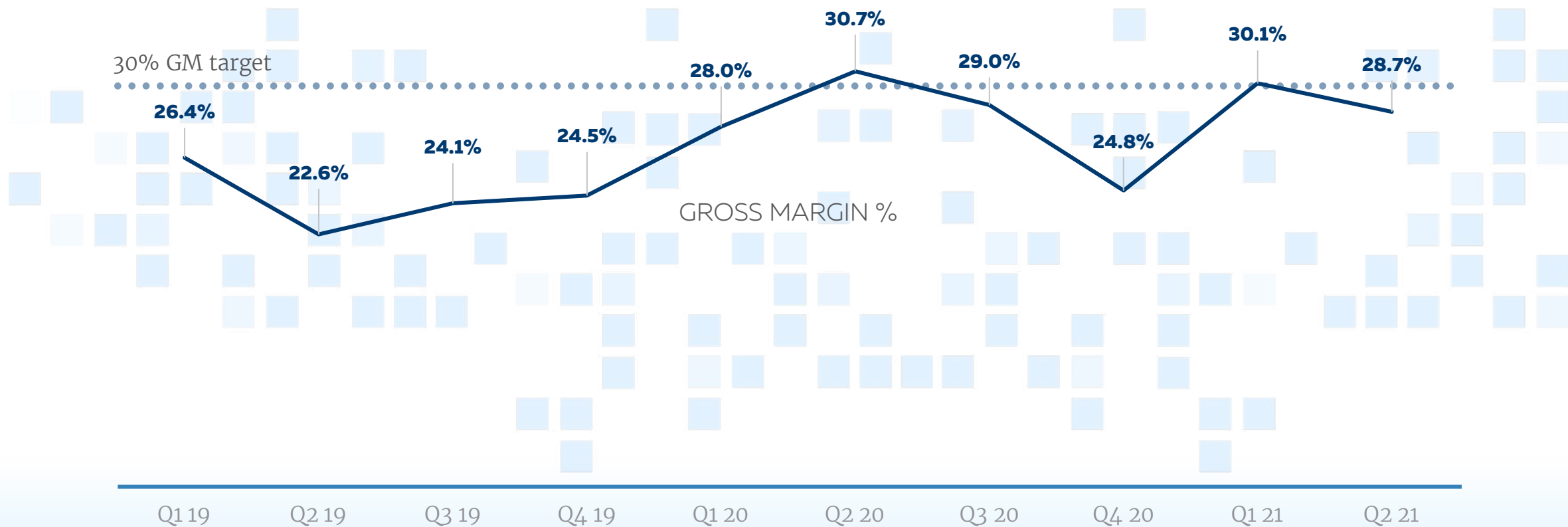


REVENUE (C\$ MILLIONS)



OPEX, MIX & REVENUE MANAGEMENT

INITIATIVES HAVE DRIVEN APPROX **30% GROSS MARGINS**



PROVIDING OPERATIONAL LEVERAGE AS POST-COVID ENVIRONMENT FIRMS UP

DIGITAL INNOVATION PROVIDES **PATH TO VALUE CREATION**

MULTIPLE OF ENTERPRISE VALUE | **REVENUE**



0.6X



1.1X



2.1X



9.1X

MULTIPLE OF ENTERPRISE VALUE | **EBITDA**



3.6X

DCM today



7.3X

Conventional print
solution providers



13.6X

Tech-enabled marketing
workflow providers



34.0X

DAM tech-enabled
service providers

THANK YOU

