



Canopy Media

Q2 2019 - Inserts Market Review



Full Market

Magazines + Press

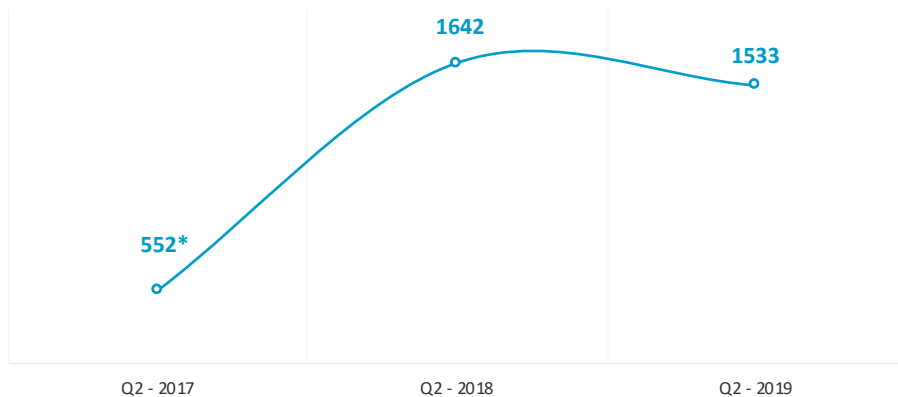


Market Insight

Inserts Landscape

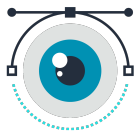
Q2 Overview

2017 vs 2018 vs 2019



Insert activity between Q2 2018 and 2019 has been consistent, with a small drop off of -7%

Promis Life were a key driver in Q2 2019, tripling their activity versus Q2 2018

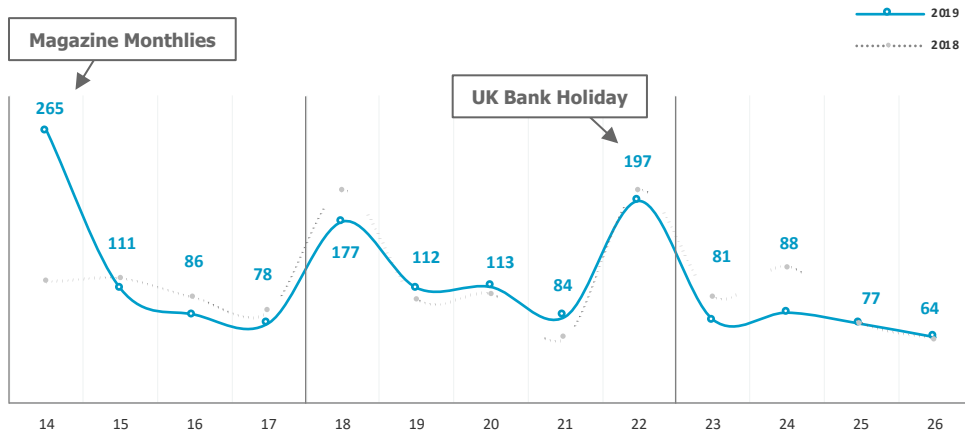


Market Insight

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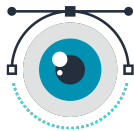
Q2 (2019) Inserts by Week

2019 vs 2018



Week on week activity has also been consistent with 2018

The most significant increase can be observed in week 14 (April) with an increase of +125%, largely driven by the magazine monthly releases across 99 individual titles

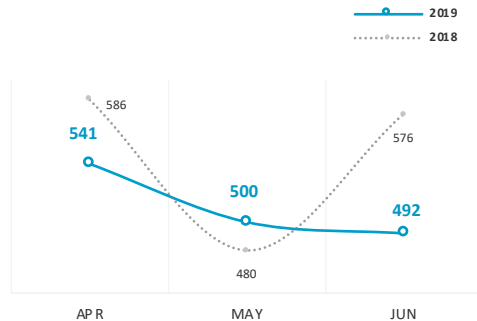
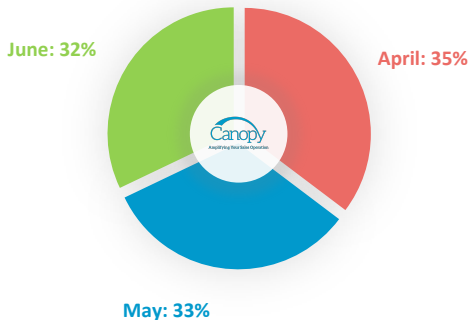


Market Insight

Inserts Landscape

Q2 (2019) Inserts by Month

2019 vs 2018



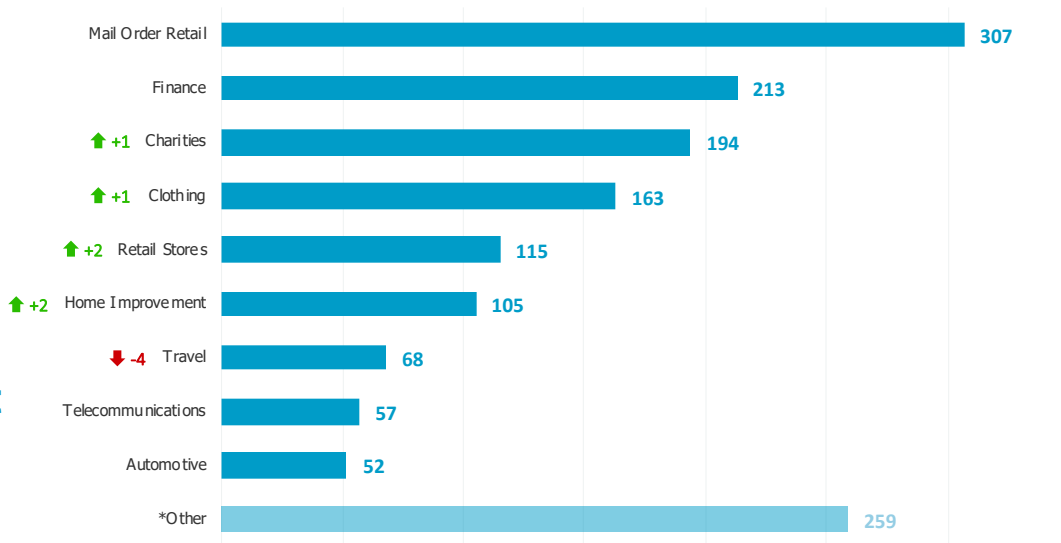
Activity throughout Q2 was consistent with the highest share of inserts being in April. Here we can report a +125% uplift compared to this period last year.

Q2 (2019) Inserts by Top Category

2019



Market Insight Inserts Landscape

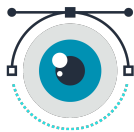


*Other = 17 more categories across over 259 campaigns in Q2 2019

↑ +1 = Position up/down within top categories compared to Q1 2019

Mail Order Retail and Finance remain as the top 2 categories

Travel sector as we would expect is down this quarter, however we can report a significant uplift with Retail Stores and Home Improvement rising by 2 positions

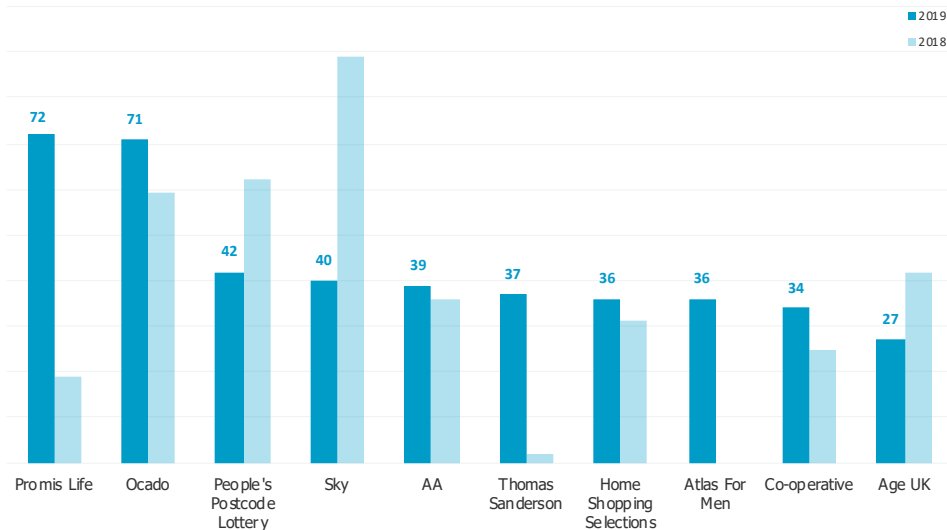


Market Insight

Inserts Landscape

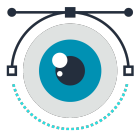
Q2 (2019) Inserts by Top Advertisers

2019 vs 2018



We can report a steady uplift among many of the top advertisers in Q2 2019 compared to 2018

Promis Life, Thomas Sanderson and Atlas For Men being the most significant. These advertisers alone account for nearly 10% of all inserts campaigns placed this quarter

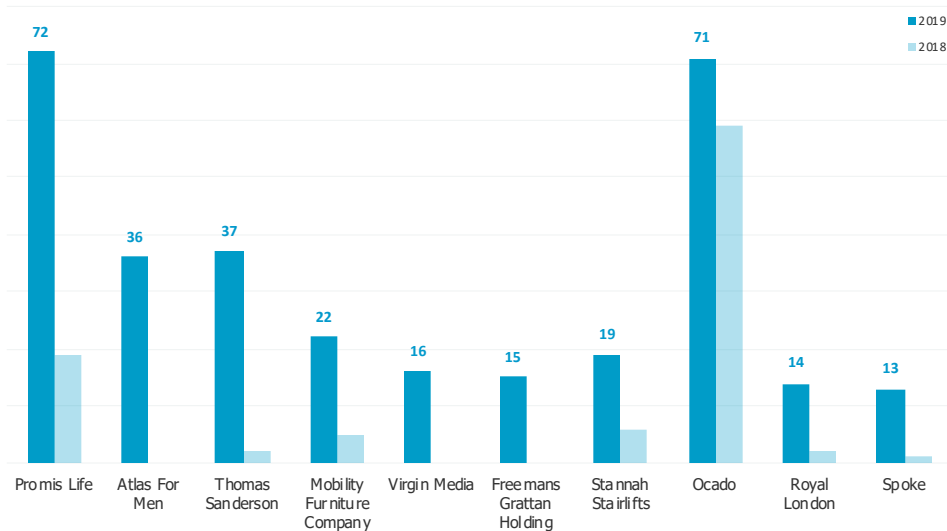


Market Insight

Inserts Landscape

Advertisers with significant growth in Q2 (2019)

2019 vs 2018



A number of the top advertisers also increased their activity in Q2 and we can report 160 new advertisers

This has led to a positive churn rate of +26%, Q2 2018 vs 2019



Thank You!
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