

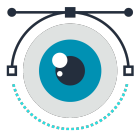
Canopy Media

Q3 2019 - Inserts Market Review



Full Market

Magazines + Press

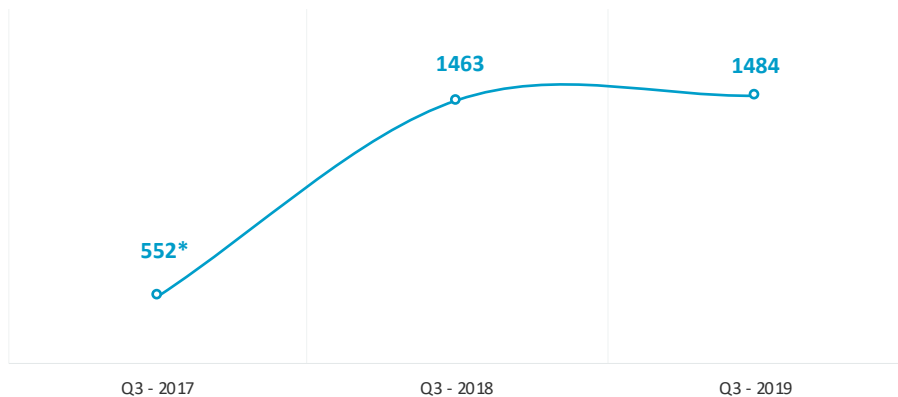


Market Insight

Inserts Landscape

Q3 Overview

2017 vs 2018 vs 2019

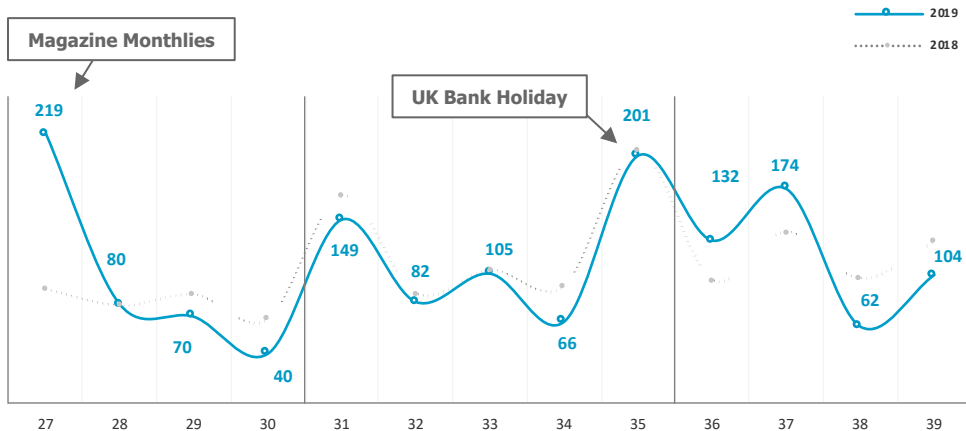


Insert activity between Q3 2018 and 2019 has been consistent, with an increase of +1.4%

Ocado were a key driver in Q3 2019, more than doubling their activity versus Q3 2018

Q3 (2019) Inserts by Week

2019 vs 2018



Market Insight
Inserts Landscape

Week on week activity has also been consistent with 2018

The most significant increase can be observed in week 27 (July) with an increase of +138%, largely driven by the magazine monthly releases across 99 individual titles

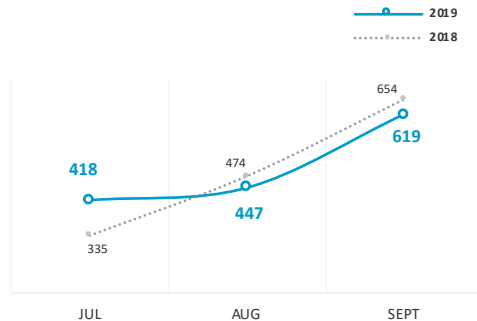
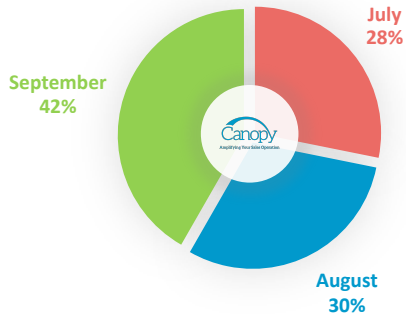


Market Insight

Inserts Landscape

Q3 (2019) Inserts by Month

2019 vs 2018



Activity throughout Q3 was consistent, with the highest share of inserts being in September. We also welcomed a +25% uplift in July when compared to this period last year.

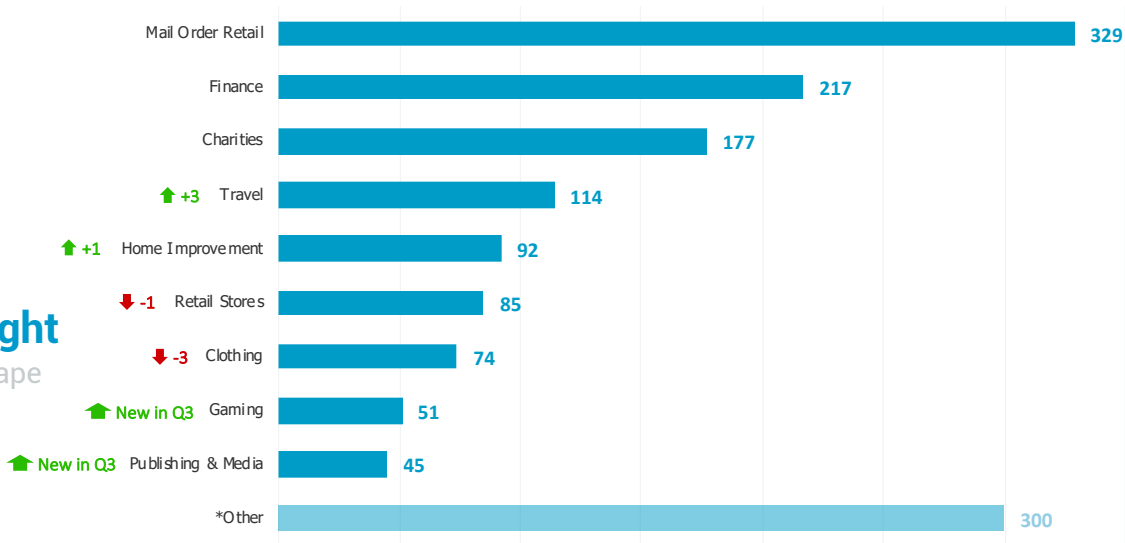
Q3 (2019) Inserts by Top Category

2019



Market Insight

Inserts Landscape



*Other = 22 other categories across over 300 campaigns in Q3 2019

↑ +1 = Position up/down within top categories compared to Q2 2019

Mail Order Retail, Finance and Charities remain as the top 3 categories

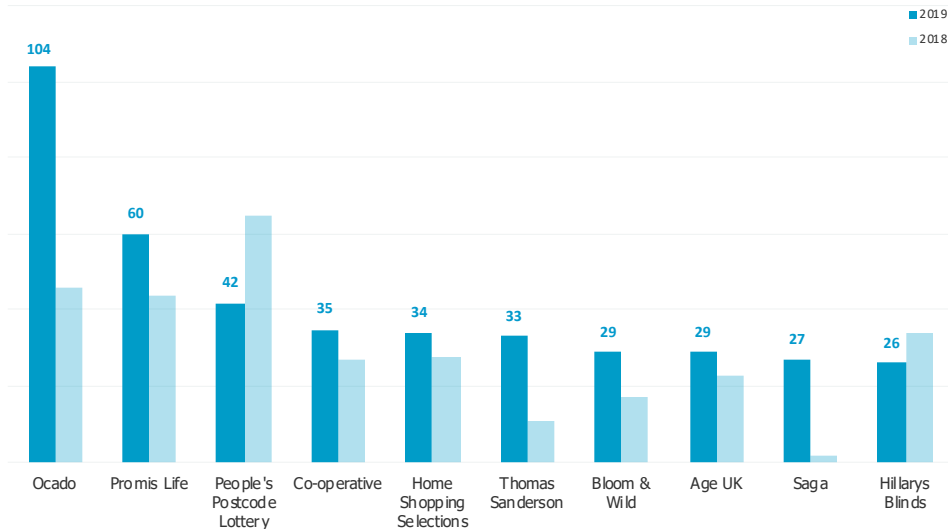
Travel sector has had the most significant uplift by 3 positions, largely due to the months prior to the summer holidays

Q3 (2019) Inserts by Top Advertisers

2019 vs 2018



Market Insight Inserts Landscape



We can report a steady uplift among many of the top advertisers in Q3 2019 compared to 2018

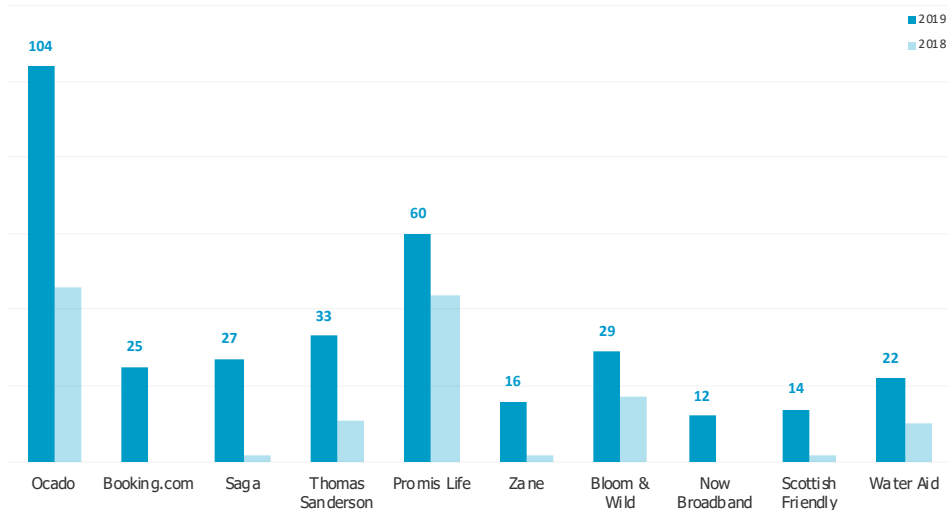
Ocado and Promis Life being the most significant. These two advertisers alone account for 12% of all inserts campaigns placed this quarter

Advertisers with significant growth in Q3 (2019)

2019 vs 2018



Market Insight Inserts Landscape



A number of the top advertisers also increased their activity in Q3 and we can report 131 new advertisers

Thank You!
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