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**BPA Worldwide:  
The Center For Audited Comparability**

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### **Comparability Serves The Needs Of Buyers**

BPA Worldwide's Market Comparability Programs underscore a basic BPA Worldwide principle - that BPA Worldwide best serves its member publications by first serving the needs of advertisers and advertising agencies.

BPA Worldwide's Market Comparability Programs already have become a vital, integral force in the selection and evaluation of the business press. That's because buyers of advertising space need not only verified circulation figures, but specific data presented uniformly so that valid comparisons can be made of the recipients of all publications in any given market. For buyers, these comparable data are necessary for making effective and efficient space buys. For sellers, these comparable data are necessary to point out the unique aspects of their recipients and market served.

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**Comparability: How It Works**

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### **Comparability Results From Buyer/Seller Forums**

Space buyers and space sellers, meeting in committee, agree on common language in determining business/occupational breakdowns and a standard qualification questionnaire for collecting the data.

### **Seven Basic Steps Lead to Comparability**

1. Each publisher voluntarily declares for a single existing market or petitions for a new primary market classification.
2. Publishers who have declared for the same primary market meet first to discuss comparability objectives and to recommend an advertiser company, an advertising agency, and a publication representative for a comparability committee.
3. This planning committee, which has equal representation from BPA Worldwide's tripartite membership, with the advertiser representative always as chairman, meets to develop a suggested program.
4. The entire market group of interested advertiser company, agency, and publications reviews the business/occupational breakdown and questionnaire developed by the planning committee and proposes any changes.
5. BPA Worldwide produces a brochure that describes the new comparability program, with a proof copy sent to each participating publisher for ratification.
6. A special subcommittee of the Board of Directors, again consisting of equal advertiser, agency and publication membership, approves the program as adopted by the market group and ratified by publishers.

7. BPA Worldwide produces the official brochure for a new comparability program, including a sample business/occupational breakdown and the common qualification questionnaire. The brochure also lists the date when each publication will begin reporting circulation on a comparable basis.

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## **Comparability Growth Depends On Member Involvement**

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BPA Worldwide Market Comparability Programs depend on strong input from advertiser and agency members. Publications serving markets in which you advertise want to know the type of information you need.

Members wishing to see a comparability program initiated in any market, and/or willing to serve on a planning committee, may contact Richard J. Murphy, Senior Vice President, Auditing, at BPA Worldwide's Connecticut headquarters, Two Corporate Drive, Ninth Floor, Shelton, CT 06484 (203.447.2800).

## **The Premise Behind Comparability Is Basic And Simple**

To make valid comparisons, a common language must be developed to describe the circulation of different publications serving one specific market.

With such common language, a media buyer can better target the advertising message to the audience the advertiser needs to reach, by selecting portions of the circulation of different publications serving the market.

With comparability, the media buyer knows (1) any questionnaires used to solicit business/occupational data have followed the guidelines that were established to ensure comparability; (2) the data about the recipients on the different publications' circulation lists have been reported in a comparable format; and (3) the data have been audited by BPA Worldwide for comparability.

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## **Guidelines For BPA Worldwide's Comparability Programs**

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### **Objective**

The objective of BPA Worldwide's Market Comparability Programs is to develop, through open meetings of advertisers, advertising agencies, and publishers, mutually acceptable market definitions and their terminology in each of the markets served by audited publications. This is done market-by-market on a voluntary basis, with publishers choosing to participate.

### **Objects**

1. Establish a special subcommittee of the Board of Directors, consisting of equal advertiser, agency and publication membership to consult and/or approve programs as adopted by the market group and ratified by publishers.
2. Develop and maintain a set of primary market classifications.

3. Permit publishers to designate their primary classifications, thereby volunteering to participate in the comparability program for that market.
4. Produce a directory of publications that have declared for each of the market classifications.
5. Consult with the Business Publications Committees of AAAA, ANA, B/PAA, and ABP to secure their support for these programs.
6. Invite all interested publications, including those in No. 999 and NEC, to preliminary orientation meetings with the publications in each market group. Whenever possible, these meetings will be in cooperation with ABC and ABC publications.
7. Produce the official brochure for a new and/or ratified comparability program, including a sample business/occupational breakdown and the common qualification questionnaire. The brochure also lists the date when each publication will begin reporting circulation on a comparable basis.

### **Publication Classification and Market Designation**

Markets that have been established and assigned a market program number are broken down into one of the following four (4) designations:

1. *Program In Effect* -Participating publications are reporting in accordance with the comparability brochure available for this market.
2. *Program Not In Effect* - Completed comparability brochure available but not yet in effect for this market.
3. *Program Under Revision* – The participating publication(s) unanimously agree to waive the reporting of comparability until revisions have been completed.
4. *Program Available For Reporting* – Market classifications currently without active publication participants.

Publications which are not classified in an existing market or petition for a new market will be classified under one of these two market classifications: No. 999, Awaiting Assignment To Market Classification; or NEC, Not Elsewhere Classified.

1. A No. 999, Awaiting Assignment To Market Classification, is given only to new publication members. These members are given up to three years from the date of their initial audit to declare for an existing market or petition for a new market. Publications will be permitted to enter No. 999 only once.
2. Publication members which do not declare or petition during the three year period will be placed in NEC, Not Elsewhere Classified, at the expiration of this period.

Publications in NEC will remain there until they declare for a market.

Should a publication member's petition for a new classification be pending at the expiration date of its three year period for electing a market classification, that publication member's deadline shall be extended until action is taken on its petition.

## **Program Development and Ratification**

1. Publications which have declared for the same primary market, including those interested publications in No. 999 and NEC, convene first to discuss the objectives of the comparability program and to obtain the publisher's suggestions on the appointment of a tripartite committee of advertiser, agency and publisher representatives.
2. This planning committee, with the advertiser or agency representative as chairman, meets to develop on acceptable business/occupational analysis. Interested advertisers, advertising agencies, and publishers participate in these meetings.
3. At the conclusion of the negotiations, the planning committee will prepare a draft copy of the program to be mailed to any interested publications for inspection and comment.
4. After publisher review, a mail survey is conducted whereby a proof copy of the program will be distributed to interested advertisers and advertising agencies. The survey results are to be shared with participating publications and the market's tripartite committee, and a final proof prepared for ratification.
5. Those publications declared for the market vote by ballot to ratify the program. A majority of publications in the market is required to ratify.
6. Once successfully ratified by declared publications, a proof copy of the program is submitted to the BPA Worldwide Board of Directors for approval.
7. In its truest sense, achieving comparability requires the participation of two or more publications serving the same market. However, comparability programs may be developed for market classification that include only one publication. If developed, such programs will be considered preliminary.

Given a second publication's entrance into the market classification, that publication may exercise its inherent option to initiate an automatic reevaluation of the preliminary program. Reevaluations will be conducted on a tripartite level. In contrast, the second publication may opt instead to accept the preliminary program. After a preliminary program has been successfully reevaluated or accepted, depending upon the option chosen, the resulting program will no longer be considered preliminary.

Subsequently, any publication member or applicant participating in a market comparability program, including newly declared participants, any advertisers and advertising agencies, may request a review and/or amendments to the program. At the discretion of the President, reevaluations will be conducted either on a tripartite level or independently by the publishers.

Prior to the market review, all publications within the industry who are aware and willing to participate are invited. To ratify an agreement, a majority vote of those publishers who have declared for that given market will be required.

## **Reporting Comparably**

1. When a publication reports on a comparable basis:
  - a. A notation will be made on the front page of the circulation statement;
  - b. A notation will be made in paragraph 3a of the circulation statement that a comparable breakdown has been approved for this market;

- c. The format of the comparable breakdown will printed in paragraph 3a of the circulation statement; and,
  - d. The auditor will verify that any qualification forms utilized meet the requirements of the questionnaire guideline, as provided in the established buyerstrac.
2. A new publication member may waive the reporting of the comparability analysis for up to three years from the date of its initial audit. If comparability is waived, the following comment shall appear in paragraph 3a:

“Since sufficient time has not elapsed for this publication to prepare the necessary comparable analysis, the publisher has temporarily waived the reporting of comparability. The publisher has until (date) to comply.”

(The date will be either three years from the date of the initial audit, or a date indicated by the publisher if less than three years.)

3. Publication members in No. 999 or NEC choosing to declare for a market with a comparability program in effect may delay temporarily the initial reporting of the comparable analysis, provided it is clearly noted that:

“The comparable analysis is not being reported at the option of the publisher. It will be reported (date).” The date is to be a maximum 18-month grace period from the declaration date. (For publications in No. 999, see no. 2 above).

Publication members in No. 999 or NEC choosing to declare for a market with a comparability program not yet in effect, have up to the program’s effective date or an 18month grace period (whichever is longer) from the declaration date to comply with a program. (Grace period does not apply if declaration occurs prior to, or within six months of, the program completion date).

At the end of the 18-month grace period, a publication member of a market comparability program in effect may still delay the initial reporting of comparability for an additional 6 months. This 6-month extension must be approved by the President. Should a publication member be unable to report comparably within the time allotted, the publication member will be classified as NEC (Not Elsewhere Classified).

4. A publication member that has changed ownership may request an extension to delay temporarily the initial reporting of comparability beyond extensions granted the former owner or the program’s effective date, whichever applies. Requests for extensions will be reviewed by the President, and granted at his discretion.

If the extension is approved while a program is in effect, the following comment shall appear in paragraph 3a:

“Due to change in ownership, this publication had been granted an extension until (date) to conform to the (name of market) comparability program that became effective (date).”

If, however, a program has not yet gone into effect, the preceding comment will not appear until the program’s effective date.

5. Publication participants in a market comparability program may not claim comparability until the official release by BPA Worldwide of a circulation statement or audit report, which contains in paragraph 3a the comparable indicia and format for the market.

Participation in a specific market with a comparability program in effect does not automatically grant comparable status.

## Market Comparability Brochure

1. BPA Worldwide will print copies of the official brochure. Incorporated in the brochure are the various elements of the comparability program. The elements will include:
  - a. An effective date by which time each participating publication in the market shall comply with the requirements of comparability in that market. Comparability may be reported prior to the effective date at the option of the publisher.
  - b. A format for reporting comparable business/occupational data in paragraph 3a.
  - c. A guideline for qualification questionnaires so that each publication in a given market, when utilizing a questionnaire, will elicit that direct data in a comparable manner.
2. When a program is being developed, publications are given the opportunity to decide how much flexibility they wish to incorporate into the program's questionnaire guidelines regarding the wording and sequencing of questions and classification choices. The following is a summary of the three (3) alternatives available when developing a program's questionnaire guidelines:
  - a. The guidelines state: "The questionnaire must follow the exact and entire wording and sequencing of the guidelines below." Further criteria are:
    - 1) Publishers may add classification choices; however, they must appear after all the comparable choices, but before "Other \_\_\_\_\_". (Please describe)
    - 2) The sequences of questions may be rearranged, provided the questions are not dependent upon one another. For example, question no. 2 need not be dependent or affected by the response to question no. 1.
    - 3) Publishers may add questions in any sequence, provided the comparable questions are not dependent upon one another.
    - 4) No other deviations are allowed.
  - b. The guidelines state: "The questionnaire must follow the wording and sequence of the guidelines below." Further criteria are:
    - 1) The wording and sequence of classification choices must appear exactly as they appeared in the guideline.
    - 2) Inapplicable questions or classification choices may be omitted at the publisher's option.
    - 3) Any additional classification choices must appear after the last comparable choice, but before "Other \_\_\_\_\_". (Please describe)
    - 4) Additional questions may appear in any sequence preferred by the publisher. They may also appear between comparable questions.
  - c. The guidelines state: "The questionnaire shall include the following elements." Further criteria are:

- 1) The sequence of questions and/or classification choices may be rearranged.
  - 2) The wording of classification choices may not be modified.
  - 3) Inapplicable questions and classification choices may be omitted. Of course, an "Other" option must always appear.
  - 4) Additional questions and classification choices may appear in any sequence preferred by the publisher.
3. Inherent in the comparability program is the obligation for publishers to report their circulation against the comparable breakdown; however, publishers may:
- a. Report additional classifications and breakdowns beyond those within a program;
  - b. Subdivide particular classifications;
  - c. Combine two or more classifications, provided the total of all combinations does not exceed 10 percent of total qualified circulation; and,
  - d. Omit classifications that are not covered by their classification.
- Exceptions taken must be noted on the publisher's circulation report.

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If asked to describe BPA Worldwide's Market Comparability Program, some publishers might say it should be "more flexible" and "less rigid". Ask another group of publishers and a slightly different view is expressed. The program is "an excellent marketing tool", "a method for accentuating my uniqueness in the market place", and "a good vehicle for head-to-head competition".

Why do these contrasting views exist? We believe the first group has not yet become involved or learned to get comparability to work for them. The second group, however, has, by taking advantage of four publisher's options that add infinite flexibility to every comparability program.

In a nutshell, the four options allow publishers to *add*, *delete*, *subdivide*, and *combine* the categories and classifications of a comparability program to best suit their publication's coverage of the market place.

For example, if the comparability program for your market contained five business categories, but your publication served recipients in two additional categories, you may add the two categories beyond the comparability program.

The reverse is also true. Assuming your publication served recipients in three of the five business categories, you could delete the two inapplicable categories for the business analysis.

The subdividing of comparable categories into more specifically defined categories is the third option. For example, the category "Wholesalers and Distributors" could be split into separate categories, 1-Wholesalers and 2-Distributors. This would give media planners more precise data.

Finally, publishers may combine comparable categories, with relatively insignificant amounts of circulation, to create a combined category or categories of greater proportion. However, the total

percentage of combinations throughout the comparable analysis cannot exceed 10% of the reported total qualified circulation.

Publishers and circulation professionals must understand that comparability programs are far from inflexible or rigid. On the contrary, flexibility has been built into every program. The four options demonstrate that every publication is able to compete effectively with their competition while accentuating their uniqueness in the market place.

Comparability programs should, therefore, be viewed as yet another marketing tool available to publishers and circulation professionals to promote their publication in the marketplace.