



**AMENDMENTS TO  
BPA WORLDWIDE BUSINESS PUBLICATION RULES**

**BULLETIN B 04-2**

**December 2004**

Effective Immediately, BPA Worldwide rules are amended as follows; ***new material in bold italic typeface.***)

***B5.34***

***When making circulation comparisons, print circulation shall be compared separate from digital circulation. Comparisons of total qualified circulation must include both print and digital circulation.***

**B7.13 Digital Version**

Multiple pages of content that are distributed electronically as a unit. The digital version shall be a replica of the print version in terms of editorial (not format or advertising), subject to the rules governing separate editions and the approval of the President.

Circulation for digital versions shall be audited to ensure the systems of the media owner and their vendor are in compliance with BPA Worldwide rules and policies before such data can appear on a circulation statement. A special audit may be undertaken to verify the digital distribution.

The printing and release of an audit report shall be at the media owner's option.

In all audit reports and circulation statements, digital circulation shall be detailed separately throughout the report. Individuals receiving both the print and digital versions shall be included only once within paragraphs 1, 2, 3a, 3b, 3c, 4, and 9. A table shall be reported in Paragraph 11 which details the gross copy count for both the print and digital versions.

If an alert to a qualified subscriber (paid and non-paid) is undeliverable, the media owner shall have no more than 90 days to remove said subscriber from their circulation file, or ensure that the delivery details are corrected. (See Sections B7.24, B7.29, B9.13, B9.15, B9.16, B9.22, B9.22, B9.37.5, B9.47, B9.50, B9.73, B10.4)

***Non-qualified digital version copies shall not be reported on BPA Worldwide circulation statements and audit reports.***

### **B9.73**

Publication members reporting print and digital versions may report at their option ~~a table in paragraph 11 which details~~ whether subscribers to the digital version have automatically received the digital version or manually downloaded/retrieved/received the digital version. (See B7.13)

~~If the table is reported, such data shall be included for each issue reported in Paragraph 2 that has digital subscribers. The publisher shall have the option to report further detail.~~

***If download; retrieved; received data is reported, such data shall be reported in paragraphs 1, 2, 3a, 3b, 3c, 4, and 9.***

#### **B9.73.1**

A download; retrieved; received issue may be counted within the table as long as the issue was downloaded; retrieved; received within 60 days of the alert. At the time of circulation statement filing, any issues for which final download; retrieved; received counts are not available may be estimated based on a historical average. At the time of audit the estimation will be compared to actual data. If the variance is material, an audit report will be issued to adjust the circulation accordingly.

#### **B9.73.2**

Publications reporting the required net qualified circulation for digital versions elsewhere throughout the statement may include a table in paragraph 11 detailing the gross number of qualified digital subscribers and qualified print copies existing for each issue. Those recipients receiving both the print and digital versions, shall be a gross count.

### **B10.21 Personal Direct Request From Recipient: Internet and E-mail**

#### **B10.21.1**

For those publishers wishing to accept requests via electronic medium (e.g., internet, and electronic mail (E-mail), a copy of, or hyperlink to, a transcript (screen-by-screen panels) shall be submitted to BPA Worldwide for approval prior to use. BPA Worldwide's approval will be given to any electronic transcript which contains:

- . . . adequate instruction (menu and screen panels) to the recipient end user.
- . . . a provision for the name, title, and company address of the recipient.
- . . . an acceptable request question with a personalized data question to confirm the request (as defined in Section B10.20.2) and a provision for the date.
- . . . incoming email correspondence, not web qualification-form generated, requesting a publication does not need a personal data question. However, out bound solicitations for email requests must include a notification that the subscriber may be contacted by a third party to verify the publication request.
- . . . documentation of the respondent's conformance to the Field Served and Definition of Recipient Qualification shall be available either through the electronic medium or a secondary source.
- . . . ***Web based, single response, qualification questions may be pre-populated with prior year information provided the subscriber proactively verifies the data in each question by clicking a separate "confirm" button for each question. The request question ("Do you wish to receive/continue to receive XYZ magazine") cannot be pre-populated.***

## **B15.0 - PROJECTED RESEARCH STUDY OF PASS-ALONG RECEIVERSHIP**

### **B15.1**

A publication member in good standing may apply for the pass-along research study service and shall proceed as follows:

Complete a contract for BPA Worldwide's services and file it with the Corporation together with the established fee periodically set by the Board of Directors. Attached to the contract shall be a complete description of the purpose of the research, the completed statement of methodology and, the questionnaire/telephone interview form to be used.

The pass-along data will be collected via a telephone, **e-mail** and/or mail survey using an approved questionnaire form.

The telephone, **e-mail** and/or mail surveys to be used to develop pass-along data shall include a provision to record the quantity of recipients. Publishers may gather pass-along recipients' full names at the publisher's option. BPA Worldwide reserves the right to further verify these pass-along recipients if it is deemed necessary in order to complete the study.

***The study must*** abide by the standards established by the Advertising Research Foundation's Guidelines for Audience Research on Business Publications, ***with the exception of BPA's required response rate (see below).***

At the conclusion of the study, complete a BPA Worldwide Projected Research Study of Pass-Along Receivership Form and file it with the Corporation. The form shall be in conformance with these Rules.

At the conclusion of the study, complete a "*Full Disclosure Form for Research*" established by the Association of National Advertisers, Inc. and submit a copy to BPA Worldwide.

BPA Worldwide will limit its service to that research based only on the publication's qualified circulation and shall not include any study which directly compares one publication with another or relates to preferences of the recipient/subscriber. The only type of research study BPA Worldwide may verify shall be a publication's Pass-Along Receivership.

BPA Worldwide shall release a Research Study of Pass-Along Receivership Report only if a publication attains a minimum response of ~~60%~~ **45%** of the sample size which also shall be an acceptable and a representable minimum of the population being tested.

## **B16.0 – SUBSCRIBER STUDY AUDIT**

### **B16.1**

***A publication member in good standing may apply for the subscriber study audit service and shall proceed as follows:***

***Complete a contract for BPA Worldwide's services and file it with the Corporation. Attached to the contract shall be a complete description of the purpose of the research, the completed statement of methodology, and the questionnaire/telephone interview form to be used.***

***The subscriber study data will be collected via a telephone, e-mail and/or mail survey using a BPA approved questionnaire form.***

***An independent, third party market research company that is familiar and compliant with Advertising Research Foundation (ARF) guidelines must perform the subscriber study. The study must abide by the standards established by the Advertising Research Foundation's Guidelines for Audience Research on Business Publications, with the exception for BPA's target response rates (see below).***

***BPA Worldwide shall release an Audit Opinion Letter only if a publication attains a minimum response with a target of 35% of the sample size which also shall be an acceptable and a representable minimum of the population being tested.***

***The subscriber study must include a sample drawn from the entire qualified file with a minimum of 1,000. Subscriber exclusion may include international addresses, residents of Alaska and Hawaii, copies lacking individuals by name and address, company names only, multiple copies to the same addressee, copies to the advertiser and the agency promotion list. Exclusions must be disclosed.***

***A minimum of 350 useable responses in tabulation is required.***

### **B16.2**

***Upon receipt of the contract, BPA Worldwide will review the objective of the subscriber study and the intended methodology. BPA Worldwide will make an evaluation of the methodology to determine its conformance to minimum standards for sampling, questionnaire construction, data collection, response rates and analysis as well as generally accepted research practices and ethics. BPA Worldwide may elect to reject the contract at this point and return to the publication the contract, fees and any other material submitted. BPA Worldwide shall deduct from the refunded fees any costs associated with its evaluation.***

### **B16.3**

***Upon acceptance of the contract, BPA Worldwide shall make an examination of the research materials and records and complete an audit attesting to the completion of the specifications (methodology) of the study, including the sample selection and survey implementation, the tabulations of respondents, and the accurate coding and analyzing of all usable responses. BPA Worldwide, however, shall not make any interpretations or draw any conclusions nor shall it attest to the soundness or correctness of the data resulting from the publisher's choice of research methodology.***

**B16.4**

***At the successful completion of the audit, BPA Worldwide will issue an Auditor Opinion Letter. The letter will be separate from all other BPA Worldwide reports of the member.***

**B16.5**

***If it is found that the publication's (or the independent research firm's) records are incomplete or unavailable and the audit of the research cannot be made in accordance with BPA Worldwide procedures, the audit shall be terminated and all fees forfeited. No further attempt may be made by BPA Worldwide to verify that particular study.***

**B16.6**

***An Audit Opinion Letter released by the Corporation attesting to the verification of: the statement of methodology, incentive, sample selection, issue sampled, publishing company and address/phone number, market research company and address/phone number.***

**B16.7      *Audit Opinion Letter Contents***

***The Audit Opinion Letter will include the following elements:***

***The name of the publication member, its company and address***

***The name of the independent market research company and address***

***The date the study was completed.***

***Number of questionnaires distributed***

***Means of distribution (date of individual efforts)***

***Total useable respondents***

***Response Rate***

***Incentive***

***The date/month/period of the issue of the publication from which the sample was drawn.***

**B16.8**

***Publishers will have the option of disclosing subscriber study questionnaire/survey.***

**B16.9**

***It is recommended that one of the two issues analyzed (May or November) be used as the population from which a sample is drawn. The use of issues other than May or November may result in the need for additional testing during BPA Worldwide's verification of the research study.***

**B16.10**

*A complete list of all names selected in the sample in zip code then alphabetic by last name sequence shall be retained, either in print or electronically, and made available to the Corporation.*

**B16.11**

*Affidavits verifying that all names selected for the study were included in the study, itemized telephone bills, and audio tape recordings of telephone and/or personal interviews (if used), including any follow-up contacts, shall be retained and made available to the Corporation.*

**B16.12**

*Copies of completed telephone interview forms, e-mail survey returns and/or all mail survey returns, with envelopes, and an affidavit (from the publication and independent market research firm) attesting to the completeness of the returns, shall be retained and made available to the Corporation.*

**B16.13**

*Printout or listing of all usable responses including all code input, shall be made available to the Corporation.*

**B16.14**

*Tabulations, manual or computerized, analyzing any coded input of the usable returns must be made available upon request. The Corporation may request any additional printouts or analyses it deems necessary in the verification process.*

**B16.15**

*Any other records deemed necessary by the Corporation in the fulfillment of its service.*

**B16.16**

*All records necessary for the verification shall be retained by the publisher and made available to the Corporation upon request.*



**AMENDMENTS TO  
BPA WORLDWIDE CONSUMER MAGAZINE RULES**

**BULLETIN C 04-2**

**December 2004**

Effective Immediately, BPA Worldwide rules are amended as follows; ***new material in bold italic typeface.***)

**C5.14**

***Circulation promotions and comparisons may not promote or report only percentages of either respondents or total qualified. The qualified circulation count shall always be disclosed when reporting percentages, either as a total or for each individual number claimed. When reporting percentages of respondents, the base of respondents on which the percentage was calculated shall also be shown. (See C5.37)***

**C5.35**

***When making circulation comparisons, print circulation shall be compared separate from digital circulation. Comparisons of total qualified circulation must include both print and digital circulation.***

**C7.9 Digital Version**

Multiple pages of content that are distributed electronically as a unit. The digital version shall be a replica of the print version in terms of editorial (not format or advertising), subject to the rules governing separate editions and the approval of the President.

Circulation for digital versions shall be audited to ensure the systems of the media owner and their vendor(s) are in compliance with BPA Worldwide rules and policies before such data can appear on a circulation statement. A special audit may be undertaken to verify the digital distribution.

The printing and release of an audit shall be at the media owners option.

In all audit reports and circulation statements, digital circulation shall be detailed separately throughout the report. Individuals receiving both the print and digital versions shall be included only once within paragraphs 1, 2, 4, 5, 6 and 7. A table shall be reported in Paragraph 8 which details the gross copy count for both the print and digital versions.

If an alert to a qualified subscriber (paid and non-paid) is undeliverable, the media owner shall have no more than 90 days to remove said subscriber from their circulation file, or ensure that the delivery details are corrected. (See C7.19, C9.9, C9.18, C9.19, C9.34, C9.38, C10.4)

***Non-qualified digital version copies shall not be reported on BPA Worldwide circulation statements and audit reports.***

## **C9.60**

Magazine members reporting print and digital versions may report at their option ~~a table which details whether subscribers to the digital version have automatically received the digital version or manually download; retrieved; received the digital version.~~

~~If the table is reported, such data shall be included for each issue reported in Paragraph 2 that has digital subscribers. The publisher shall have the option to report further detail.~~

***If download; retrieved; received data is reported, such data shall be reported in paragraphs 1, 2, 4, 5, 6 and 7.***

### **C9.60.1**

A download; retrieved; received issue may be counted within the table as long as the issue was download; retrieved; received within 60 days of the alert. At the time of circulation statement filing, any issues for which final download; retrieved; received counts are not available may be estimated based on a historical average. At the time of audit the estimation will be compared to actual data. If the variance is material, an audit report will be issued to adjust the circulation accordingly.

### **C9.60.2**

Magazines reporting the required net qualified circulation for digital versions may include a table detailing the gross number of qualified digital subscribers and qualified print copies existed for each issue. Those recipients receiving both the print and digital versions, shall be a gross count. This data shall appear in paragraph 8, Additional Data.

## ***C10.21 Personal Direct Request From Recipient: Internet and E-mail***

### **C10.21.1**

***For those publishers wishing to accept requests via electronic medium (e.g., internet, and electronic mail E-mail)), a copy of, or hyperlink to, a transcript (screen-by-screen panels) shall be submitted to BPA Worldwide for approval prior to use. BPA Worldwide's approval will be given to any electronic transcript which contains:***

- ... adequate instruction (menu and screen panels) to the recipient end user.***
- ... a provision for the name and address of the recipient.***
- ... an acceptable request question with a personalized data question to confirm the request (as defined in Section C10.20.2) and a provision for the date.***
- ... incoming email correspondence, not web qualification-form generated, requesting a magazine does not need a personal data question. However, out bound solicitations for email requests must include a notification that the subscriber may be contacted by a third party to verify the magazine request.***
- ... documentation of the respondent's conformance to the Market Served shall be available either through the electronic medium or a secondary source.***

#### **C10.24 Request from Recipient's Company: Internet and E-Mail**

**Electronic communications such as e-mail, Internet, and Web communications from authorized individuals or from a company requesting copies of the magazine for employees of that company may be reported as "Request from Recipient's Company: Internet and E-Mail".**

##### **C10.24.1**

**Publishers electing to use this form of company request shall comply with the following conditions: (See Rules C10.21)**

##### **C10.24.2**

**A question approximating the following shall be asked and answered as part of the electronic communication: "Please send this magazine to the following employees" or "Do you want this magazine sent to any other employee? Yes ... No..."**

**To permit future verification of your request, please give us your month and/or date of birth - Month . Date ., or your mother's maiden name or high school graduated from". Other forms of personalized questions which only the recipient and not the publisher is likely to know, may be asked. Once a particular question is used and the answer is stored, a different question shall be used for future request questions.**

##### **C10.24.3**

**The names and titles and/or functions of the employees shall be provided.**

##### **C10.24.4**

**The name and title and/or function and e-mail address of the authorized requestor shall be provided along with the company name, address, and telephone number of the company.**

##### **C10.24.5**

**All other conditions pertaining to Internet outlined in Section C10.19.12 shall be followed.**

##### **C10.24.6**

**All other conditions pertaining to telecommunications outlined in Sections C10.20 except in conditions specified for "personal" telecommunication, shall be followed.**

#### **C10.26 Communication from Recipient or Recipient's Company (Other than Request): Written**

##### **C10.26.1**

The following types of records may be reported as written communication circulation:

Standardized questionnaires to an individual Magazine, such as:

Census forms.

Editorial survey forms.

Questionnaires which do not have the provision for the Yes/No request question.

Arrears unpaid for three months and credit subscriptions unpaid for six months where the subscriber has been transferred to controlled circulation.

Reader service cards to an individual Magazine (where the recipient has not signed the card and/or answered the question "Yes, I wish to receive (continue to receive) this magazine)."

Such communications shall have provisions for date and signature of recipient or by a member of the recipient's firm and shall bear evidence of the date of mailing by the recipient, or receipt by the publisher and proof of conformance to classification.

Non-deductible association or seminar subscriptions.

Expired one and two-year paid subscriptions.

Multi-Copies to the Same Addressee circulation where the recipient at the point of redistribution has agreed to accept a specified number of copies for redistribution to qualified recipients. A written and signed redistribution agreement shall indicate the specific quantities requested, as well as the date requested. Agreements shall be obtained for no less than 95% of all points of redistribution, and for no less than 95% of the copies to be distributed.

Trade Show, Consumer Shows, and Convention distribution, where a redistribution agreement as mentioned above or a paid contract for exhibit space is obtained from the event management. Distribution of such copies are verified by third party delivery receipts, and literature supporting the event is provided. (See C9.9, C9.33, C10.17).

#### **C10.26.2**

***The following standardized questionnaires from another magazine shall be reported as Communication from Recipient or Recipient's Company (Other than Request): Written provided the other Magazine is of the same parent publishing company:***

***Personal written request forms direct from the recipient.***

***Written request forms from the recipient's company.***

***Written communication forms from the recipient or from the recipient's company.***

These sources shall be based on the qualification date of the original source document.

***The quantity of names added to the file shall be properly identified in paragraph 8 additional comments, stating: "Communication from Recipient or Recipient's Company (Other than Request): Written" includes x copies or x% requests for XYZ Magazine."***

#### **C10.26.3**

~~The following standardized questionnaires from another magazine ***from another parent publishing company*** may ***shall*** not be reported as ***Communication from Recipient or Recipient's Company (Other than Request)***: ~~written communication circulation even if the other Magazine is of the same publishing company:~~ ***These are reported as "Other Sources"***.~~

~~— Personal written request forms from another Magazine.~~

~~—Written request forms from another Magazine.~~

~~—Written communication forms from another Magazine.~~

~~These are reported as "Other Sources".~~

**C10.27 Communication from Recipient or Recipient's Company (Other than Request):  
Telecommunication**

**C10.27.1**

***The following telecommunication questionnaires from another magazine shall be reported as Communication from Recipient or Recipient's Company (Other than Request): Telecommunication provided the other Magazine is of the same parent publishing company:***

***Personal telecommunication request forms direct from the recipient.***

***Telecommunication request forms from the recipient's company.***

***Telecommunication communication forms from the recipient or from the recipient's company.***

***These sources shall age based on the qualification date of the original source document.***

***The quantity of names added to the file shall be properly identified in paragraph 8 additional comments, stating: "Communication from Recipient or Recipient's Company (Other than Request): Telecommunication" includes x copies or x% requests for XYZ Magazine."***

**C10.27.2**

Telephone interview forms shall be submitted to BPA Worldwide for approval.

**C10.27.3**

BPA Worldwide's approval will be given to any questionnaire which is consistent with the Market Served and Statement of Circulation, and the classifications reported in paragraph 4 of the circulation statement.

**C10.27.4**

Questionnaires shall also contain the instructions to the telephone interviewers, the name and address of the firm to be called, the name and title of the person being interviewed, and provision for the operator's signature and date of interview.

**C10.27.5**

These forms shall be adequately identified and dated to permit the auditor to satisfy him/herself of their authenticity and acceptability.

**C10.27.6**

Whenever more than two copies of a magazine are sent to the same addressee, a distribution agreement may be obtained via a telecommunication provided the agreement to distribute the copies is tape-recorded. The agreement shall indicate the specific quantities requested, as well as the date requested.

Agreements shall be obtained for no less than 95% of all points of redistribution, and for no less than 95% of the copies to be distributed. (See C7.19).

#### **C10.27.7**

The auditor will compare and cross-check telephone bills, interview forms, conduct confirmations and make any other tests considered essential to a complete and accurate authentication of this source. The publisher shall be billed for the costs incurred for any special tests.

#### **C10.27.8**

~~The following—~~Telecommunication questionnaires from another magazine **from another parent publishing company** shall not be reported as **Communication from Recipient's Company (Other than Request)**; telecommunication circulation, ~~even if the other magazine is of the same publishing company.~~ **These are reported as "Other Sources"**.

~~—Personal telecommunication request forms from other magazines.~~

~~—Other telecommunication request forms from other magazines.~~

~~—Telecommunication forms from other magazines.~~

~~—These are reported as "Other Sources".~~

#### **C10.28 Communication from the Recipient or Recipient's Company (Other Than Request): Internet and E-Mail**

##### **C10.28.1**

The following types of records may be reported as Communication from the Recipient or Recipient's Company (Other Than Request): Internet and E-Mail:

***Standardized questionnaires to an individual Magazine, such as:***

***Census forms.***

***Editorial survey forms.***

***Questionnaires which do not have the provision for the Yes/No request question.***

##### **C10.28.2**

***Internet questionnaires shall be submitted to BPA Worldwide for approval. BPA Worldwide's approval will be given to any communication that contains adequate instructions (menu and screen panel(s) to the recipient end-user and a provision for the name, address and email address of the recipient.)***

***Prior testing of electronic scripts, systems and procedures for soliciting this form of communication may be required to determine audit ability.***

**C10.28.3**

***BPA Worldwide's approval will be given to any questionnaire which is consistent with the Market Served, and the classification reported in paragraph 4 of the circulation statement.***

**C10.28.4**

***These questionnaires shall be adequately identified and dated to permit the auditor to be satisfied with the authenticity and acceptability.***

**C10.28.5**

***Whenever more than two copies of a Magazine are sent to the same addressee, a distribution agreement to distribute the copies is confirmed by the respondent answering a personal identifying question. The agreement shall indicate the specific quantities requested, as well as the date requested. Agreements shall be obtained for no less than 95% of all points of redistribution, and for no less than 95% of the copies to be distributed. (See B7.24)***

**C10.28.6**

***The following standardized questionnaires from another Magazine shall be reported as Communication from the Recipient or Recipient's Company (Other Than Request): Internet and E-Mail provided the other Magazine is of the same parent publishing company:***

***Personal internet/email request forms direct from the recipient.***

***Internet/email request forms from the recipient's company.***

***Internet/email communication forms from the recipient or from the recipient's company.***

**These sources shall age based on the qualification date of the original source document.**

***The quantity of names added to the file shall be properly identified in paragraph 8 additional comments, stating: "Communication from Recipient or Recipient's company (Other than Request): E-Mail" includes x copies or x% requests for XYZ Magazine."***

**C10.28.7**

***Questionnaires from another Magazine from another parent publishing company shall not be reported as Communication from Recipient or Recipient's Company (Other than Request): Internet and E-Mail. These are reported as "Other Sources".***

**C10.32 Other Sources**

**C10.32.4**

***Qualification questionnaires from another Magazine from another parent publishing company shall continue to age based on the qualification date of the original source document. (See sections 10.26.1, 10.27.3, and 10.28.6).***

## **C13.0 - PROJECTED RESEARCH STUDY OF PASS-ALONG RECEIVERSHIP**

### **C13.1**

A Magazine member in good standing may apply for the pass-along research study service and shall proceed as follows:

Complete a contract for BPA Worldwide's services and file it with the Corporation together with the established fee periodically set by the Board of Directors. Attached to the contract shall be a complete description of the purpose of the research, the completed statement of methodology and, the questionnaire/telephone interview form to be used.

The pass-along data will be collected via a telephone, **e-mail** and/or mail survey using an approved questionnaire form.

The telephone, **e-mail** and/or mail surveys to be used to develop pass-along data shall include a provision to record the quantity of recipients. Publishers may gather pass-along recipients' full names at the publisher's option. BPA Worldwide reserves the right to further verify these pass-along recipients if it is deemed necessary in order to complete the study.

**The study must** abide by the standards established by the Advertising Research Foundation's Guidelines for Audience Research on Magazines, with an exception for BPA's required 45% response rate (see below).

At the conclusion of the study, complete a BPA Worldwide Projected Research Study of Pass-Along Receivership Form and file it with the Corporation. The form shall be in conformance with these Rules.

At the conclusion of the study, complete a "*Full Disclosure Form for Research*" established by the Association of National Advertisers, Inc. and submit a copy to BPA Worldwide.

BPA Worldwide will limit its service to that research based only on the Magazine's qualified circulation and shall not include any study which directly compares one Magazine with another or relates to preferences of the recipient/subscriber. The only type of research study BPA Worldwide may verify shall be a Magazine's Pass-Along Receivership.

BPA Worldwide shall release a Research Study of Pass-Along Receivership Report only if a Magazine attains a minimum response of ~~60%~~ **45%** of the sample size which also shall be an acceptable and a representable minimum of the population being tested.

## **C14.0 – SUBSCRIBER STUDY AUDIT**

### **C14.1**

**A Magazine member in good standing may apply for the subscriber study audit service and shall proceed as follows:**

**Complete a contract for BPA Worldwide's services and file it with the Corporation. Attached to the contract shall be a complete description of the purpose of the research, the completed statement of methodology, and the questionnaire/telephone interview form to be used.**

**The subscriber study data will be collected via a telephone, e-mail and/or mail survey using a BPA approved questionnaire form.**

***An independent, third party market research company that is familiar and compliant with Advertising Research Foundation (ARF) guidelines must perform the subscriber study. The study must abide by the standards established by the Advertising Research Foundation's Guidelines for Audience Research on Magazines, with an exception for BPA's target response rates (see below).***

***BPA Worldwide shall release an Audit Opinion Letter only if a Magazine attains a minimum response with a target of 35% of the sample size which also shall be an acceptable and a representable minimum of the population being tested.***

***The subscriber study must include a sample drawn from the entire qualified file with a minimum of 1,000. Subscriber exclusion may include international addresses, residents of Alaska and Hawaii, copies lacking individuals by name and address, company names only, multiple copies to the same addressee, copies to the advertiser and the agency promotion list. Exclusions must be disclosed.***

***A minimum of 350 useable responses in tabulation is required.***

#### **C14.2**

***Upon receipt of the contract, BPA Worldwide will review the objective of the subscriber study and the intended methodology. BPA Worldwide will make an evaluation of the methodology to determine its conformance to minimum standards for sampling, questionnaire construction, data collection, response rates and analysis as well as generally accepted research practices and ethics. BPA Worldwide may elect to reject the contract at this point and return to the magazine the contract, fees and any other material submitted. BPA Worldwide shall deduct from the refunded fees any costs associated with its evaluation.***

#### **C14.3**

***Upon acceptance of the contract, BPA Worldwide shall make an examination of the research materials and records and complete an audit attesting to the completion of the specifications (methodology) of the study, including the sample selection and survey implementation, the tabulations of respondents, and the accurate coding and analyzing of all usable responses. BPA Worldwide, however, shall not make any interpretations or draw any conclusions nor shall it attest to the soundness or correctness of the data resulting from the publisher's choice of research methodology.***

#### **C14.4**

***At the successful completion of the audit, BPA Worldwide will issue an Auditor Opinion Letter. The letter will be separate from all other BPA Worldwide reports of the member.***

#### **C14.5**

***If it is found that the Magazine's (or the independent research firm's) records are incomplete or unavailable and the audit of the research cannot be made in accordance with BPA Worldwide procedures, the audit shall be terminated and all fees forfeited. No further attempt may be made by BPA Worldwide to verify that particular study.***

**C14.6**

***An Audit Opinion Letter released by the Corporation attesting to the verification of: the statement of methodology, incentive, sample selection, issue sampled, publishing company and address/phone number, market research company and address/phone number.***

**C14.7      *Audit Opinion Letter Contents***

***The Audit Opinion Letter will include the following elements:***

***The name of the magazine member, its company and address***

***The name of the independent market research company and address***

***The date the study was completed.***

***Number of questionnaires distributed***

***Means of distribution (date of individual efforts)***

***Total useable respondents***

***Response Rate***

***Incentive***

***The date/month/period of the issue of the magazine from which the sample was drawn.***

**C14.8**

***Publishers will have the option of disclosing subscriber study questionnaire/survey.***

**C14.9**

***It is recommended that one of the two issues analyzed (May or November) be used as the population from which a sample is drawn. The use of issues other than May or November may result in the need for additional testing during BPA Worldwide's verification of the research study.***

**C14.10**

***A complete list of all names selected in the sample in zip code then alphabetic by last name sequence shall be retained, either in print or electronically, and made available to the Corporation.***

**C14.11**

***Affidavits verifying that all names selected for the study were included in the study, itemized telephone bills, and audio tape recordings of telephone and/or personal interviews (if used), including any follow-up contacts, shall be retained and made available to the Corporation.***

**C14.12**

***Copies of completed telephone interview forms, e-mail survey returns and/or all mail survey returns, with envelopes, and an affidavit (from the magazine and independent market research firm) attesting to the completeness of the returns, shall be retained and made available to the Corporation.***

**C14.13**

***Printout or listing of all usable responses including all code input, shall be made available to the Corporation.***

**C14.14**

***Tabulations, manual or computerized, analyzing any coded input of the usable returns must be made available upon request. The Corporation may request any additional printouts or analyses it deems necessary in the verification process.***

**C14.15**

***Any other records deemed necessary by the Corporation in the fulfillment of its service.***

**C14.16**

***All records necessary for the verification shall be retained by the publisher and made available to the Corporation upon request.***



**AMENDMENTS TO  
BPA WORLDWIDE NEWSPAPER RULES**

**BULLETIN N 04-2**

**December 2004**

Effective immediately, BPA Worldwide rules are amended as follows (~~deleted material is stricken through;~~  
**new material in bold italic typeface.**)

**N7.11 Digital Version**

Multiple pages of content that are distributed electronically as a unit. The digital version shall be a replica of the print version in terms of editorial (not format or advertising), subject to the rules governing separate editions and the approval of the President.

Circulation for digital versions shall be audited to ensure the systems of the media owner and their vendor(s) are in compliance with BPA Worldwide rules and policies before such data can appear on a Circulation Statement. A special audit may be undertaken to verify the digital distribution.

The printing and release of an audit shall be at the media owners option.

If the average digital circulation is equal to or greater than 5% of the average paid circulation for the period, the digital circulation shall be detailed separately throughout the report. Individuals receiving print, digital, and both the print and digital versions shall be included only once within paragraphs 1, 3, 4, 5 and 10. A table may be reported in Paragraph 10 which details the gross copy count for both the print and digital versions.

If an alert or notification is sent to a subscriber indicating the digital copy is available for download is undeliverable, the media owner shall have no more than 90 days to remove said subscriber from their circulation file, or ensure that the delivery details are corrected.

***Non-qualified digital version copies shall not be reported on BPA Worldwide circulation statements and audit reports.***

**N9.25**

***Newspaper members with a daily frequency shall report the paid order as qualified circulation for the subscription period purchased. Email alerts are not required.***

Newspaper members, ***with less than daily frequency***, reporting print and digital versions, may report at their option ~~a table which details~~ whether subscribers to the digital version receive an email alert only, have automatically received the digital version, or manually downloaded/retrieved/received the digital version.

***If email alerts are reported, such data shall be reported in paragraphs 1, 3, 5, and 6. If downloaded; retrieved; received data is reported, such data shall be reported in paragraphs 1, 3, 5, and 6.*** ~~the table is reported, such data must be included for each average period reported in Paragraph 3 that has digital subscribers. The publisher shall have the option to report further detail.~~

A downloaded; retrieved; received issue may be counted within the table as long as the issue was downloaded; retrieved; received within 60 days of the alert. At the time of Circulation Statement filing, any issues for which final downloaded; retrieved; received counts are not available may be estimated based on a historical average. At the time of audit the estimation will be compared to actual data. If the variance is material, an Audit Report will be issued to adjust the circulation accordingly.

Newspapers reporting the required net qualified circulation for digital versions may include a table detailing the gross number of qualified digital subscribers and qualified print copies existed for each issue. Those recipients receiving both the print and digital versions, shall be a gross count. This data shall appear in paragraph 10, Additional Data.