



## frequently asked questions

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### FAQ:

## Coronavirus' Effects on BPA Members Reporting Options

**Updated: August 25, 2020**

Beginning on March 16<sup>th</sup>, when BPA issued a [SPECIAL STATEMENT on the Coronavirus Effects on BPA Members' Regualification Efforts](#), our CEO, Glenn Hansen, has been hosting virtual town hall meetings on Monday and Wednesday of each week at 11:00 am (ET) to discuss the impact of the pandemic on the publishing industry. Glenn also launched the Linked In group, [Coping with Corona in Media](#), for all in the media community dealing with the impact of the corona virus on business. It is a place where all can come together as a community and engage in chats and share ideas with peers. In that group Glenn has presented Q&A, best practices, case studies and ideas as to how to best cope with the impact of the pandemic. Videos of the town hall meetings are here as well.

What follows is the consolidated output of these town hall meetings and individual postings in [Coping with Corona in Media](#).

### REPORTING AGE OF SOURCE

#### May we opt not to report Age of Source?

Yes, in these unprecedented times caused by the coronavirus (COVID-19) pandemic, resulting in workplace closures, sporadic workplace visits and work-from-home solutions, consent and renewal campaigns are impacted. Understanding the effects of this pandemic on the industry, BPA offered media owners the option of not breaking out the "age of source" data (table 3b for business publications; table 4 for consumer magazines) for the upcoming June 2020 Brand Reports, or September 2020 Brand Reports (for publishing members in Canada). Taking it a step further, due to the overwhelmingly positive feedback to that decision, the BPA Worldwide Board of Directors voted to make the temporary waiver a permanent standard effective immediately.

Not having to report the age of each record will alleviate optics of the file aging due to the unavailability of subscribers during their companies' COVID-19 crisis response.

Waiving the reporting is not mandatory. Media owners may continue to break out age of source information based on buyer demand or to use the data as a differentiator. And post crisis, media owners will continue to have that choice.

**As we are unable to obtain renewed requests to receive our media given our subscribers are not at their work facilities due to “shelter in place” directives, if some of this circulation ages beyond the required 36-month qualification period, may we have an exception to continue to serve these subscribers and report as “qualified circulation”?**

**UPDATE:** Yes, following on to the March 16<sup>th</sup> announcement to allow the option of not reporting Age of Source, and the decision of the Board to make that option permanent, BPA announced, on March 30<sup>th</sup>, [an exception for the reporting period ending June 2020](#), or September 2020 (for publishing members in Canada). Media owners may carry as “qualified” circulation sources aging beyond 36 months but not to exceed 48 months. *In early July, BPA announced it is extending the exception through the end of the qualified period of the analyzed issue for the December 2020 reporting period.*

If Age of Source is NOT reported, the percentage of Total Qualified circulation at 36+ to 48 months must be footnoted.

The exception to carry sources up to 48 months applies to only four sources:

- I. Direct Request
- II. Request from Recipient’s Company
- III. Membership Benefit
- IV. Communication (Other than Request)

This exception affords the media owner the opportunity to continue to serve those subscribers whose request to receive would otherwise lapse for not responding due to sudden “shelter in place” requirements.

For the six month period ended December 2019, an average of 3% of all audited circulation fell in the 25 to 36 month old period. Therefore, BPA does not anticipate that much circulation will age beyond 36 months, but in these dire times BPA wishes to extend every opportunity to our members.

With the reporting period ending June 2021, or September 2021, BPA will revert back to the 36-month qualification period.

**If I utilize this exception, will my “request” sources over 36 months be accepted by the US Postal Service for my periodical class rate qualification?**

**GREAT NEWS!** The Post Office is in sync with BPA’s exception permitting requestors to age beyond 36 months. The Post Office extension carries to July 15<sup>th</sup>. The Post Office is receptive to reevaluating based on persisting pandemic conditions. For the USPS notice: <https://postalpro.usps.com/node/7929>

**If I utilize this exception, how will my direct and other request circulation be treated in the evaluation of eligibility under Heritage Canada’s Aid to Publishers component of the Canadian Periodical Fund (CPF)?**

**GREAT NEWS!** One of the eligibility requirements under Aid to Publishers is to distribute at least 50% of circulation consisting of direct and other request copies (Request from Recipient’s Company) during the publisher’s financial year. The emphasis of funding is based on the proven levels of request copies – not aging of copies. Current application guidelines of this program are posted, here: <https://bit.ly/3cg6B2S>.

## What will the Source and Age table look like in the BPA report if I opt to waive reporting of age of source?

For the analyzed issue for the period ending June 2020, or September 2020 (for publishing members in Canada), (July 2020 for healthcare journals), BPA are not requiring the reporting of age. Think of tables 3B or 4 without the three-year breakdown. There will be one number for each source and a footnote explaining the impact of the virus.

Footnote: “In these unprecedented times caused by the coronavirus (COVID-19) pandemic, resulting in workplace closures, sporadic workplace visits and work-from-home solutions, consent and renewal campaigns are impacted. Therefore, BPA Worldwide has granted an exception to reporting Age of Source for all 2020 reports. Although age is not reported, all qualified circulation must be sourced within 36 months of the analyzed issue.”

\*If the media owner is exercising the option to maintain circulation up to 48 months, the above footnote would be modified accordingly. The # and % of circulation over 36 months must be noted if reporting Age of Source was waived.

There are several versions of the Source and Age table:

Here is the current standard table showing Age by **three** years with Written, Telecommunication and Electronic broken out:

### 3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF (ANALYZED ISSUE DATE)

Qualification Source	Qualified Within			Print	Digital	Total Qualified	Percent
	1 year	2 years	3 years				
I. <b>TOTAL</b> - Direct Request:							
a. Written							
b. Telecommunication							
c. Electronic							
II. <b>TOTAL</b> - Request from recipient's company:							
a. Written							
b. Telecommunication							
c. Electronic							
III. <b>TOTAL</b> - Membership Benefit:							
a. Individual							
b. Organizational							
IV. <b>TOTAL</b> - Communication (other than request):							
a. Written							
b. Telecommunication							
c. Electronic							
V. <b>TOTAL</b> - Sources other than above (listed alphabetically):							
Association rosters and directories							
Business directories							
Manufacturer's, distributor's and wholesaler's lists							
Other sources							
VI. <b>TOTAL</b> - Single Copy Sales:							
<b>TOTAL QUALIFIED CIRCULATION</b>							
<b>PERCENT</b>							

Here is the current standard table showing Age by **three** years without Written, Telecommunication and Electronic broken out:

**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF (ANALYZED ISSUE DATE)**

Qualification Source	Qualified Within			Print	Digital	Total Qualified	Percent
	1 Year	2 Years	3 Years				
I. Direct Request:							
II. Request from recipient's company:							
III. Membership Benefit:							
V. Communication (other than request):							
V. <b>TOTAL</b> – Sources other than above (listed alphabetically):							
Association rosters and directories							
Business directories							
Manufacturer's, distributor's, and wholesaler's lists							
Other sources							
VI. Single Copy Sales:							
<b>TOTAL QUALIFIED CIRCULATION</b>							
<b>PERCENT</b>							

Here is the current standard table showing Age by **four** years with Written, Telecommunication and Electronic broken out:

**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF (ANALYZED ISSUE DATE)**

Qualification Source	Qualified Within				Print	Digital	Total Qualified	Percent
	1 year	2 years	3 years	4 years				
I. <b>TOTAL</b> – Direct Request:								
a. Written								
b. Telecommunication								
c. Electronic								
II. <b>TOTAL</b> – Request from recipient's company:								
a. Written								
b. Telecommunication								
c. Electronic								
III. <b>TOTAL</b> – Membership Benefit:								
a. Individual								
b. Organizational								
IV. <b>TOTAL</b> – Communication (other than request):								
a. Written								
b. Telecommunication								
c. Electronic								
V. <b>TOTAL</b> – Sources other than above (listed alphabetically):								
Association rosters and directories								N/A
Business directories								N/A
Manufacturer's, distributor's and wholesaler's lists								N/A
Other sources								N/A
VI. <b>TOTAL</b> – Single Copy Sales:								
<b>TOTAL QUALIFIED CIRCULATION</b>								
<b>PERCENT</b>								

Note: In these unprecedented times caused by the coronavirus (COVID-19) pandemic, resulting in workplace closures, sporadic workplace visits and work-from-home solutions, consent and renewal campaigns are impacted. Therefore, BPA has granted an exception permitting publishers to carry as "qualified" circulation sources aging beyond 36 months but not to exceed 48 months. This is for all 2020 reports.

Here is the current standard table showing Age by **four** years without Written, Telecommunication and Electronic broken out:

**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF (ANALYZED ISSUE DATE)**

Qualification Source	Qualified Within				Print	Digital	Total Qualified	Percent
	1 Year	2 Years	3 Years	4 Years				
I. Direct Request:								
II. Request from recipient's company:								
III. Membership Benefit:								
IV. Communication (other than request):								
V. <b>TOTAL</b> – Sources other than above (listed alphabetically):					N/A			
Association rosters and directories					N/A			
Business directories					N/A			
Manufacturer's, distributor's, and wholesaler's lists					N/A			
Other sources					N/A			
VI. Single Copy Sales:								

**TOTAL QUALIFIED CIRCULATION  
PERCENT**

Note: In these unprecedented times caused by the coronavirus (COVID-19) pandemic, resulting in workplace closures, sporadic workplace visits and work-from-home solutions, consent and renewal campaigns are impacted. Therefore, BPA has granted an exception permitting publishers to carry as "qualified" circulation sources aging beyond 36 months but not to exceed 48 months. This is for all 2020 reports.

Here is a version without reporting Age of Source with all circulation sourced within **three** years with Written, Telecommunication and Electronic broken out:

**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF (ANALYZED ISSUE DATE)**

Qualification Source	Print	Digital	Total Qualified	Percent
I. <b>TOTAL</b> – Direct Request:				
a. Written				
b. Telecommunication				
c. Electronic				
II. <b>TOTAL</b> – Request from recipient's company:				
a. Written				
b. Telecommunication				
c. Electronic				
III. <b>TOTAL</b> – Membership Benefit:				
a. Individual				
b. Organizational				
IV. <b>TOTAL</b> – Communication (other than request):				
a. Written				
b. Telecommunication				
c. Electronic				
V. <b>TOTAL</b> – Sources other than above (listed alphabetically):				
Association rosters and directories				
Business directories				
Manufacturer's, distributor's and wholesaler's lists				
Other sources				
VI. <b>TOTAL</b> – Single Copy Sales:				

**TOTAL QUALIFIED CIRCULATION  
PERCENT**

Note: In these unprecedented times caused by the coronavirus (COVID-19) pandemic, resulting in workplace closures, sporadic workplace visits and work-from-home solutions, consent and renewal campaigns are impacted. Therefore, BPA Worldwide has granted an exception to reporting Age of Source for all 2020 reports. Although age is not reported, all qualified circulation must be sourced within 36 months of the analyzed issue.

Here is a version without reporting Age of Source with all circulation sourced within **three** years without Written, Telecommunication and Electronic broken out:

**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF (ANALYZED ISSUE DATE)**

Qualification Source	Print	Digital	Total Qualified	Percent
I. Direct Request:				
II. Request from recipient's company:				
III. Membership Benefit:				
IV. Communication (other than request):				
V. <b>TOTAL</b> – Sources other than above (listed alphabetically):				
Association rosters and directories				
Business directories				
Manufacturer's, distributor's, and wholesaler's lists				
Other sources				
VI. Single Copy Sales:				

**TOTAL QUALIFIED CIRCULATION  
PERCENT**

Note: In these unprecedented times caused by the coronavirus (COVID-19) pandemic, resulting in workplace closures, sporadic workplace visits and work-from-home solutions, consent and renewal campaigns are impacted. Therefore, BPA Worldwide has granted an exception to reporting Age of Source for all 2020 reports. Although age is not reported, all qualified circulation must be sourced within 36 months of the analyzed issue.

Here is a version without reporting Age of Source with all circulation sourced within **four** years with Written, Telecommunication and Electronic broken out:

**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF (ANALYZED ISSUE DATE)**

Qualification Source	Print	Digital	Total Qualified	Percent
I. <b>TOTAL</b> – Direct Request:				
a. Written				
b. Telecommunication				
c. Electronic				
II. <b>TOTAL</b> – Request from recipient's company:				
a. Written				
b. Telecommunication				
c. Electronic				
III. <b>TOTAL</b> – Membership Benefit:				
a. Individual				
b. Organizational				
IV. <b>TOTAL</b> – Communication (other than request):				
a. Written				
b. Telecommunication				
c. Electronic				
V. <b>TOTAL</b> – Sources other than above (listed alphabetically):				
Association rosters and directories				
Business directories				
Manufacturer's, distributor's and wholesaler's lists				
Other sources				
VI. <b>TOTAL</b> – Single Copy Sales:				

**TOTAL QUALIFIED CIRCULATION  
PERCENT**

Note: In these unprecedented times caused by the coronavirus (COVID-19) pandemic, resulting in workplace closures, sporadic workplace visits and work-from-home solutions, consent and renewal campaigns are impacted. Therefore, BPA Worldwide has granted an exception to reporting Age of Source and permitting publishers to carry as "qualified" circulation sources aging beyond 36 months but not to exceed 48 months. This is for all 2020 reports. # of copies or #% of Total Qualified circulation is 36+ to 48 months.

Here is a version without reporting Age of Source with all circulation sourced within **four** years without Written, Telecommunication and Electronic broken out:

**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF (ANALYZED ISSUE DATE)**

Qualification Source	Print	Digital	Total Qualified	Percent
I. Direct Request:				
II. Request from recipient's company:				
III. Membership Benefit:				
IV. Communication (other than request):				
V. <b>TOTAL</b> – Sources other than above (listed alphabetically):				
Association rosters and directories				
Business directories				
Manufacturer's, distributor's, and wholesaler's lists				
Other sources				
VI. Single Copy Sales:				
<b>TOTAL QUALIFIED CIRCULATION</b>				
<b>PERCENT</b>				

Note: In these unprecedented times caused by the coronavirus (COVID-19) pandemic, resulting in workplace closures, sporadic workplace visits and work-from-home solutions, consent and renewal campaigns are impacted. Therefore, BPA Worldwide has granted an exception to reporting Age of Source and permitting publishers to carry as "qualified" circulation sources aging beyond 36 months but not to exceed 48 months. This is for all 2020 reports. # of copies or #% of Total Qualified circulation is 36+ to 48 months.

Here is a version without reporting Age of Source with 3+ paid circulation and non-paid circulation sourced within **four** years with Written, Telecommunication and Electronic broken out:

**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF (ANALYZED ISSUE DATE)**

Qualification Source	Qualified Non-Paid	Qualified Paid	Total Qualified	Percent
I. Direct Request:				
II. Request from recipient's company:				
III. Membership Benefit:				
IV. Communication (other than request):				
V. <b>TOTAL</b> – Sources other than above (listed alphabetically):				
Association rosters and directories				
Business directories				
Manufacturer's, distributor's, and wholesaler's lists				
Other sources				
VI. Single Copy Sales:				
<b>TOTAL QUALIFIED CIRCULATION</b>				
<b>PERCENT</b>				

Note: In these unprecedented times caused by the coronavirus (COVID-19) pandemic, resulting in workplace closures, sporadic workplace visits and work-from-home solutions, consent and renewal campaigns are impacted. Therefore, BPA Worldwide has granted an exception to reporting Age of Source and permitting publishers to carry as "qualified" circulation sources aging beyond 36 months but not to exceed 48 months. This is for all 2020 reports. # of copies or #% of the Total Qualified circulation is paid 3+ year. # of copies or #% of Total Qualified circulation is non-paid 36+ to 48 months.

## A Few Words of Caution:

As renewals are more challenging to accomplish in a “shelter from home” environment, and files age, when all returns to normal, do your utmost best to bring the quality of your files back to the present. Letting data age and get stale is a downward spiral. The older data gets, its value degenerates. If you are carrying deadwood, your advertisers can’t get response. That leads to a determination of failed advertising and the dollars will move elsewhere.

## What else can I report to show how recent my subscribers engage with my brand?

BPA encourages media owners with the capability, to consider a new table on “Recency of Engagement.” It is an optional table\* which shows current engagement by old consents and non-request circulation. If it is reported, it will follow the table for “Qualification Source Breakout of Qualified Circulation” and contain an analysis (count and percentage) of the qualified non-paid (and at the option of the media owner, paid circulation) by Recency of Engagement with the brand. The period of engagement is set to be reported using 1 and 2-year columns. Engagement that occurred 25 months or greater is not included and reported with unknown engagement as “Data Not Available.” See below for a sample table.

### TRANSACTION/INTERACTION HISTORY OF QUALIFIED CIRCULATION AS OF (Date of Analyzed Issue)

Qualification Source	Engaged Within			Print	Digital	Total Qualified	Percent
	1 year	2 years	Data Not Available				
I. Direct Request, Request from Recipient's Company, Membership Benefit:	68,435	28,472	-	93,494	3,413	96,907	96.4
II. All Other Sources:	3,656	-	-	2,426	1,230	3,656	3.6
<b>TOTAL QUALIFIED CIRCULATION</b>	<b>72,091</b>	<b>28,472</b>	<b>-</b>	<b>95,920</b>	<b>4,643</b>	<b>100,563</b>	<b>100.0</b>
<b>PERCENT</b>	<b>71.7</b>	<b>28.3</b>	<b>-</b>	<b>95.4</b>	<b>4.6</b>	<b>100.0</b>	

TRANSACTION/INTERACTION HISTORY. The most recent date an individual transacted/interacted with the brand, including purchases, opened email newsletter, visited websites, requested magazine, attended webinar, attended event, or communicated with the media brand in some other way

As in the footnote, BPA defines engagement as the most recent date an individual transacted or interacted with the media brand, including purchases, opened an email newsletter, visited the website, requested the magazine, attended a webinar, attended an event, or communicated with the media brand in some other way.

Note the definition of engagement includes, “Visited the Website”. BPA was asked if a site visit could update Age of Source. Yes, if it is the web site of the media brand that was visited and the media owner can trace a visit back to a “permissioned user” (requestor), such visit can be interpreted as a “Communication”. It should be dated for Age of Source based on the date of the Communication, and it would be reported as a Communication source, not a Request source.

Keep in mind that any requests dated within 36 months will apply toward meeting the criteria for United States periodical class postal rates even though the BPA report is not showing the Age. Therefore, if you use a site visit to change Source and update Age, retain the original opt-in to receive the publication. Provided that it is dated within 36 months of the analyzed issue, it can be used to satisfy Postal requirements for the “50%+” request requirement for periodical class rates.



\*Note: Media owners have the option to **NOT** report Age of Source of the non-paid circulation in one, two, and three-year columns. However, effective August 2021, if this option is exercised, and there is circulation from a source aged 25 months or more from the analyzed issue, a table reporting “Recency of Engagement” is required for this segment of the circulation.

**If I opt not to report Age in the June 2020 report and the December 2020 report is my interim report, what do I do as I customarily repeat my percentages for reporting this table on the interim report?**

It is not possible to repeat percentages which weren’t previously reported. Repeat of percentages is for the interim issue and will only be possible if actual Age was reported on the previous audit. BPA continues the option to waive Age. That’s one option.

As another option, if the virus is short lived and qual campaigns kick in over the summer, it will be the media owner’s decision to report Age for the December 2020 report based on “actual” not “projected” data.

At the time of the June 2021 audit, BPA will audit the source and qualification as reported in the December 2020 and June 2021 reports. BPA will also audit Age even if it is not reported. This is to ensure compliance with the 36-month qualification period.

**If June 2020 is my interim six-month reporting period and I traditionally repeat my source and age percentages for reporting this table, may I continue to do so?**

On the interim Brand Report, qualification figures for Source and Age as well as the Mailing Address Breakdown may be obtained by repeating the percentages for the circulation from the latest audit report and applying them to the qualified circulation for the issue analyzed for the interim statement to arrive at the total copies for each source.

This option is only available when the total qualified circulation for the issue analyzed in the interim Brand Report is less than 10% above the total qualified circulation for the issue analyzed in the latest audited Brand Report.

## Can business publications and consumer magazines omit issues from the average circulation calculation like newspapers?

Current reporting standards allow daily newspapers to omit 10 days per year from the reported average, but they must show the circulation in the issue table. Given the pandemic, BPA has granted an exemption for June 2020 Brand reports (September 2020 in Canada) that requires publishers to continue reporting the actual average for the six months in the traditional position in the Executive Summary on page 1 of the Brand Report. Following that, the publisher has the option to report an additional section in the Executive Summary, titled "Pre-Pandemic Period," to show only the issues served prior to the "shelter in place" government orders, with the number of issues disclosed.

This is not a change to the Standards, rather it is an exemption during the pandemic. See below for a sample table.

### EXECUTIVE SUMMARY

Below are the average contacts per occurrence, including frequency per period reported.

	Six Month Period			Pre-Pandemic Period			# of Issues
	Non-Paid	Paid	Average	Non-Paid	Paid	Average	
<b>THE CRITERION MAGAZINE</b> Unique Total* (6 issues in the period)							
a. Print							
b. Digital							
1. Requested***							
2. All Other Sources							
<b>THE CRITERION E-NEWSLETTERS</b>							
a. The Criterion E-Newsletter - 1 (12 issued in the period)							
b. The Criterion E-Newsletter - 2 (6 issued in the period)							
c. The Criterion E-Newsletter - 3 (3 issued in the period)							
<b>THE CRITERION EVENT TOTAL UNIQUE ATTENDEES</b>							
<b>THE CRITERION IPAD APP</b>							
<b>THE CRITERION WEBSITE</b> (Monthly Users with _____ average Pageviews)							
<b>THE CRITERION SOCIAL MEDIA</b>							
a. Twitter followers							
b. Facebook likes							
c. LinkedIn group members							

\*Unique Total represents unique recipients, not the sum of Print and Digital.

\*\*App downloads and Social Media claims are cumulative figures, not averages.

\*\*\*Requested includes the following sources: Direct Request, Request from Recipient's Company and Membership Benefit.

## COMBINING ISSUES AND THE IMPACT ON STATED FREQUENCY

### How do I report a change in frequency resulting from our combining issues during the pandemic if we intend to revert to the stated frequency in 2021?

Customarily, changes in frequency are marked with *(See Additional Data)* next to the stated number of issues per year in the Magazine section with a corresponding comment in the Additional Data section of two consecutive Brand Reports, disclosing the issue with which the change was effective.

Applied to this scenario, this procedure would result in a “change in frequency” comment on four consecutive Brand Reports (2 with the number of issues noted as 11 and 2 with the number of issues returned to 12).

In consideration of the conditions caused by the pandemic, BPA is offering the option to continue disclosing the number of issues published per year as stated prior to any production changes (e.g. combined issues) made as a result of the pandemic, provided the Media Owner intends on returning to the pre-pandemic frequency.

The number of issues claimed on the Brand Report with the affected issue(s) would be marked with *(See Additional Data)* with a corresponding comment in the Additional Data section explaining the circumstances surrounding the temporary change in frequency. The comment would not be required on the subsequent reports if the publishing schedule returns to the stated frequency.

Therefore, for the one affected report, the following comment would appear in the Additional Data section with *(See Additional Data)* in the MAGAZINE CHANNEL section for Issues Per Year.

#### ADDITIONAL DATA

##### ISSUES PER YEAR

12 issues per year; however, this year, due to the pandemic, we have combined the June and July issues. We intend on returning to 12 issues per year in 2021.

Example:

#### MAGAZINE CHANNEL

Official Publication of: None/Established: 1931/  
Issues Per Year 5 (See Additional Data)

## **PUBLICATION DISTRIBUTION CHALLENGES**

**I have been told that a Governor ordered all non-essential business closed. This includes my printer. Or I have been told my printing plant was shut to disinfect. When the plant reopens and my copies are printed, what do I do if the copies are mailed late as my digital copies were distributed on time?**

BPA recognizes there will be instances of closure which ultimately lead to issues of printed magazines mailed later than the stated date of mailing of the subsequent issue.

Two Standards come to mind, Back Copies and Late Mailings.

Any issue of the publication dated prior to the current issue is considered a “back copy”, whether served to a new or requalified/renewed recipient. The “current issue” is defined as the most recent issue (printed or electronic) distributed or placed on sale, whichever comes first. Back copies may be counted as qualified only for one issue immediately preceding the issue current at the time the recipient is distributed the back copy.

BPA Standards require transparency. Provided there is transparency, BPA will grant an exception while this crisis disrupts.

If an issue is distributed electronically and the print version cannot be distributed as it hasn’t been manufactured at the time of distributing the electronic copy, the print copies may be claimed as qualified when they are eventually printed and distributed.

Notation should occur simply noting the issue date and the distribution day of the print copies with an explanation that the printing plant was shut due to the Corona Virus.

But if copies are only Late and not Back Copies, if 15% or more of the total copies distributed (print and digital) for an issue are distributed on, or after, the stated distribution date of the next issue, the completion date of distribution for that issue shall be reported in the explanatory paragraph, Additional Data.

**If the printer closes, and we switch to sending print subscribers the digital edition, what will we need to provide digital distribution?**

Please provide:

1. The digital detailed delivery data files and distribution summary reports for all applicable issues published in the 12-month period.
2. Copies of the email alert notifications and the digital versions of the magazines for all issues published in the 12-month period.
3. For non-paid digital copies served through apps, proof of authentication and proof of access must be provided.
4. For paid digital subscriptions served via apps, reports must be provided that detail the order date, term and price paid. A payment verification check will also be completed.
5. For sponsored digital copies, digital copies sold as a premium and bundled subscription sales (print and digital copies sold in combination with paid print copy) served via apps, proof of authentication must be provided.

If needed, please request Requirements and Procedures Guide.

## **Are the requests for print going to be accepted for the digital copy?**

### **If we email a digital version to qualified non-requestors, can we count these as well?**

Here is the current standard: *“Media owners may convert “requested” print edition subscriptions to digital magazine subscriptions provided the subscriber who requested the magazines receives advance notice of the conversion and is given the option to refuse the conversion. The notice of conversion must give the media owner enough time to stop the conversion if the subscriber refuses to convert to a digital subscription. Evidence of the original request and the notice of the conversion shall be available at the time of audit.”*

However, due to the pandemic, BPA is granting an exception to the above until print is up and running again. Media owners may convert “non-requested” and “requested” print edition subscriptions to digital magazine subscriptions WITHOUT HAVING TO PROVIDE... advance notice of the conversion. BPA advises with the email alerts to the folk who are now getting digital instead of print...ask them the opt-in question so you may update your files. Previous “requestors” would have their qualification dates updated and “non-requestors” could then be converted to “request” with the recent date. BPA further suggests that you explain this is brought about by the virus and ask that when printing resumes would they like digital, print or both and service accordingly.

Publishers should exercise caution when disseminating any outbound electronic communication to subscribers normally receiving non-requested and requested print edition subscriptions. While BPA is providing special provisions to assist members at this time, we are not aware of jurisdictions permitting special provisions with respect to outbound electronic communications and handling of data. Canada’s Anti-Spam Legislation (CASL) and General Data Protection Regulation (GDPR) in Europe are two legislative frameworks to consider.

## **Our paid subscribers to print also have access to the digital edition online as part of their subscription.**

### **How can I use data on views of the digital copy on our web site?**

Unless this is behind a registration wall, meaning you can track open or download rates, there is no way for us to authenticate that a copy was consumed from the web site. If LOG IN is required, BPA can use that information for copy delivered. BPA would have to net it against the email alert files so subscribers are not double counted.

## **Due to “shelter in place” directives, what do I do with bounces to my digital magazine deliveries?**

Effective immediately, BPA Worldwide Board of Directors voted to amend the requirement to suppress all bounces before the next issue delivery. Pre-pandemic, BPA was of the opinion that media owners were potentially spending dollars to suppress and reactivate "soft bounces" to convert into deliveries. Immediate suspension is too arduous for "soft bounces," i.e., Out of Office, On Vacation, Mailbox Full. Now, BPA Standards have been revised to allow media owners to resend to soft bounces for a period of 90 days before a “soft bounce” needs to be suppressed/ inactivated. "Hard bounces," on the other hand, i.e. No Longer Employed, Deceased, etc., must be inactivated before the delivery of a subsequent issue.

If differentiation between types of “bounces” is not possible, then the media owner should default to treat all “bounces” as hard bounces and immediately suppress from future attempts to deliver.

## TELEMARKETING/RE-QUALIFICATION QUESTIONS

### **Our Telemarketer was ordered to “shelter in place;” we don’t have access to recordings. What do we do?**

Not to worry. BPA can start all our audit work as BPA staff are working from home. BPA will delay the “confirmations” aspect until all are back to work in respective facilities and have access to the recordings.

### **Our Telemarketer was ordered to “shelter in place;” they can make calls but not recordings. What do we do?**

BPA will treat this as “recording refusals” are treated. Subscriptions to individuals who refuse to be recorded, are to be asked, and answer, a question approximating the following during the telephone interview: *“Do you wish to receive (continue to receive) this publication? Yes... No...”* A personal identifying question (PIQ) must be asked and answered. If the respondent refuses to answer any and all personal identity questions, the interview cannot be considered a “request” (without the recording).

### **Can you clarify the number of people for which one person can request copies and be reported as “Direct Request”?**

A co-worker may request the publication on behalf of two other qualified co-workers through one solicitation and the two requests may be reported as “Direct Request” provided the person making the request isn't also requesting for themselves (maximum two requests). If the person being solicited requests for themselves, then only one request for another co-worker may be reported as “Direct Request.” Requests for three or more persons are to be reported as Request from Recipient’s Company.

## ANALYZED ISSUES/AUDIT CYCLES

### **Suppose I choose May 2020 as my analyzed issue with my qualification year ending May 1st, the pandemic subsides and I receive renewals after May 1<sup>st</sup> up through June 30th. May I report these opt-ins as one-year request even though they are dated after the analyzed issue closed?**

Normally the standards prohibit this, but, yes, under current conditions BPA is making an exception and you will be permitted to use these records reported as one-year requests for the May 2020 issue (provided they received the issue). BPA will also allow the reporting of these records as one year for the May 2021 issue.

### **If my January or February 2020 issue better reflects business as usual before the pandemic, may I use either of those issues to analyze for my June 2020 report?**

Absolutely. You may choose to analyze any issue in the six-month period. Our Standards require: *“Once an analyzed issue has been selected it can not be changed for thirty-six months.”*; however, BPA will grant an exception to this Standard and permit media owners to select any issue to analyze for the six months ended June 2020, December 2020 and June 2021. (Likewise for healthcare journals reporting ending July and January.) For publishers in Canada, this may include September 2020, March 2021 and September 2021.

Remember, transparency is the key. Whenever the issue analyzed is 10% or more, above or below the average of the other issues reported an appropriate comment shall be made in the explanatory paragraph, Additional Data. BPA encourages you to use that note to explain the impact of the virus pandemic on your decision to select the analyzed issue.

## **May I change audit cycles now and shift my audit from a 12-month period ended June to that of December?**

BPA advises staying on the June cycle. BPA will audit June 2020 as usual. BPA will make sure the circulation is qualified within 36 months (unless you are opting for the 48-months regimen). BPA will not require the reporting of age. Come November, the media owner can report actual data and that will be audited as part of the June 2021 audit. Or opt not to report Age of Source. No extra audit is required.

But if the media owner's strategy requires the change in cycles, BPA would audit June 2020 "on cycle" and then have the December 2020 six-month audit to change cycles. Given the market conditions, fees for this will be at a greatly reduced rate.

## **CONTINUE ADVERTISING IN THE DOWNTURN**

### **How can I take better advantage of a shift to digital advertising in these times?**

As you see dollars move to digital, consider getting into our automated co-op, BPA's [Media Exchange](#), and start displaying advertising to your audience wherever they are going online. 81 audited sites are currently trading 11.3 million impressions monthly.

### **Sell e-newsletter ads through the co-op too!**

BPA has launched a programmatic solution to monetize email newsletter ad inventory. Building on our co-op for on-line ads through MediaFuse, the BPA Media Exchange technology platform, BPA has created a solution with a simple media owner implementation that connects the new ad unit to unique advertising demand sourced directly by RevenueStripe. You maintain control of IAB brand categories accessing email inventory through the MediaFuse real-time bidding environment. Similar to open market real time bidding monetizing website inventory, advertising is matched to individual users based on their digital footprint. The result is a customized ad experience for the users while generating additional revenue for you. [Learn more and get started here.](#)

### **What else can BPA do to help in the absence of face-to-face selling due to "shelter in place"?**

BPA wants advertisers to be able to come to the BPA site, evaluate media and shop. With a click on the Adwanted shopping cart icon now installed throughout the BPA Reports Library, BPA's users enter into a marketplace for the selected media and they can transact – be it for online, print, or e-newsletter ads, directory listings or face-to-face events.

To take advantage of this service, media owners need to activate their account with [Adwanted.com](#). When the account is activated, a user can transact.

Media owner members will be empowered to offer the same "Shopping Cart" icon option on their own sites and in digital media kits.

BPA will update this guide as new questions arise.

Certainly, we all look forward to the end of this pandemic and a return to normal business. Meanwhile, best of health!