



BPA Worldwide Standards December 2021

In these Standards, the following verbal forms are used:

- _ “shall” indicates a requirement;
- _ “should” indicates a recommendation;
- _ “may” indicates permission;
- _ “can” indicates a possibility or a capability

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SECTION I – AUDIT SERVICES OFFERED

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1-1 BRAND

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1-1 100 ELIGIBILITY

1-1 101

Any media brand shall qualify as stated in Section B2.0 of the Bylaws.

If a brand has sub-brands or channels such as multiple e-newsletters, and/or multiple websites, the CEO of BPA shall determine whether the brand is eligible for a single membership or is, in effect, two or more separate brands requiring separate memberships and brand audits for each.

When a brand has two or more magazines, two or more newspapers, etc., refer to BPA Bylaw B2.1.6.

1-1 200 DEFINITIONS

1-1 201 Brand Report

A report containing one or more audited media channels of a media owner's brand. Media owners may choose to report an integrated database of media channel recipients (a single relational database) or report data for each channel separately (See 1-1 400).

1-1 202 Channel

A specific method of communication used to reach an intended audience.

1-1 203 Combined Sales of Brand Products

Subscriptions to multiple media channels of the same brand, including but not limited to: publication, website, email newsletters, webinars, white papers, etc. sold together at a special rate. The price paid for the combined offer shall be used to determine the value of the subscription. Comment shall be made in the explanatory paragraph, Additional Data, providing details of the number of subscriptions sold in combination with other branded media channels.

1-1 204 Integrated Database

Shall be defined as a relational database platform that allows for a single data entry for each individual's first name, last name and contact details within the file, applies a unique identifier to each name, and stores other information required to qualify the individual such as, job title, current company information, and any demographic data. It links the individual with all forms of various media that has been requested or is being sent, or with which the individual is engaged.

The database tracks and records all requests to receive or engage with the various channels available, and the date of the request/engagement. Dates for each activity are housed separately and enable the media owner to search the most recent data to provide accurate reports of contacts of their various channels. Tracking mechanisms shall be included enabling the media owner to locate all sources of the request/ engagement activity.

1-1 205 Non-Integrated Data

Individual databases and/or files for each channel within the brand. Each database shall contain contact information for each individual including [but not limited to] all information required to qualify the individual such as, job title, current company information, any demographic data, source and age qualification data.

1-1 206 Net Unique Individuals

The total number of unique (unduplicated) recipients appearing in an integrated database. Individuals who receive more than one channel of the brand are included only once in the unique individual count.

1-1 207 Shared Media Channels

Media channels that are shared across multiple brands such as [but not limited to]: web portals that host several vertical market websites operated by a single media owner; email newsletters and/or events that serve multiple brands (For Business Publications see Section 1-2 408 B).

Reporting of shared media channels is permitted on Brand Reports. Disclosure is required on the first page of the Brand Report and a reference note in each table where shared media channels are included.

Example of the disclosure for a website portal on page one, and everywhere the shared data is reported:

Shared media channel (XYZ website) - serving both [brand name] and [brand name].

1-1 208 Site License – Digital Magazines

Site Licenses may only be reported on BPA Brand Reports as a channel of communication.

Site licenses are defined as a contract or agreement between a media owner member and a company/association to provide multiple individuals access to a digital edition of the magazine hosted on the subscribing organization's intranet. The contract/agreement shall require the subscriber/administrator of the site license notify all the individual seats (individuals) of the availability of each issue. Licenses may be reported for definitive amount of seats only, "global" or "companywide" license agreements may not be reported.

Paid site licenses shall adhere to paid circulation standards.

Non-paid site licenses shall adhere to "Request from Recipient's Company," (Business) and all other non-paid standards.

The media owner may disclose throughout the BPA Worldwide Brand reports the number of authorized Digital Magazine Site Licenses and Seats (individuals) served as part of the license. Digital Magazine Site licenses and Seats shall not be reported as qualified circulation. A media owner may disclose the number of digital magazine site licenses and authorized seats, including paid and non-paid data, demographic data, license source and age data, and geographic data, using standard BPA Worldwide tables. Reporting the name of the company to which the content has been licensed shall be optional. Licenses may be reported for definitive amounts only, "global" or "companywide" license agreements may not be reported. Qualified circulation and site license seats may not be summed on the BPA reports.

1-1 209 Statement of Content Platform

The Statement of Content Platform discloses the form or combination of forms of digital magazines/editions included in the qualified circulation. These are defined in the statement according to the appropriate definitions and descriptions that include: Dynamic, Targeted, Replica Plus, Editorial Replica, or Enhanced.

Media owners have the option to report digital magazines/editions by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

1-1 300 BRAND REPORT – GENERAL INFORMATION

1-1 301

Brand members shall report their circulation/distribution in approved formats or on forms supplied by the Corporation.

1-1 302

The filing of Brand circulation/distribution data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, circulation/distribution data and other data, in any form and manner authorized by the Board of Directors.

1-1 303

In the interests of uniformity in appearance and typographical setup of the BPA Worldwide Brand Reports, BPA Worldwide will process all paragraphs which require special typesetting, ruling and extra pages. Where additional costs are incurred in setting up special paragraphs the member shall be billed those costs.

1-1 304

Production and processing of a Brand Report shall be charged for at a uniform flat rate to be set from time to time by the Board of Directors and included in a Fixed Price Agreement (FPA).

1-1 305

Brand Audit Applicant - An applicant shall file a three or six month circulation/distribution claim as the basis for the initial audit for any consecutive three or six month period during which circulation/distribution has been practiced. Upon completion of the audit including review by BPA's internal audit team, the Brand will be admitted to membership.

1-1 306

With the exception of data issued annually or semi-annually, BPA Worldwide Brand members will release two Brand Reports each year for six month periods. These two six month reports will be covered by one twelve-month annual Brand Audit Report.

(a) For Business Publication and Consumer Magazine Brand data on a calendar year basis, the procedure is as follows:

An interim Brand Report for the six-month period January - June inclusive.

An analyzed Brand Report for the six-month period July - December inclusive.

A twelve-month Brand Report for the period January - December inclusive, which is the basis for the annual Brand Audit Report.

For Brand data reported on a fiscal year basis ending June, the procedure is as follows:

An interim Brand Report for the six-month period July - December inclusive.

An analyzed Brand Report for the six-month period January - June inclusive.

A twelve-month Brand Report for the period July - June inclusive, which is the basis for the annual Brand Audit Report.

(b) For Canadian members wishing to report Brand data ending March, the procedure is as follows:

An interim Brand Report for the six-month period April - September inclusive.

An analyzed Brand Report for the six-month period October - March inclusive.

A twelve-month Brand Report for the period April - March inclusive, which is the basis for the annual Brand Audit Report.

(c) For Canadian members wishing to report Brand data ending September, the procedure is as follows:

An interim Brand Report for the six-month period October - March inclusive.

An analyzed Brand Report for the six-month period April - September inclusive.

A twelve-month Brand Report for the period October - September inclusive, which is the basis for the annual Brand Audit Report.

- (d) For Medical Journals, members will release two brand reports each year for the six months ended July and for the six months ended January. Six-month brand reports will be covered by one twelve-month annual Brand Audit Report. For publications on a calendar year basis, the procedure is as follows:

An interim brand report for the six-month period February - July inclusive.

A second brand report for the six-month period August – January inclusive.

A twelve-month brand report for the period February – January inclusive, which is the basis for the annual Brand Audit Report.

The six-month claims will be checked and released as a Brand Report upon receipt and completion of processing.

- (e) Canadian community newspapers members have the option to release one /Brand Report each year for the twelve months ended March and the option of filing an interim Report for the six-month period of April – September.
- (f) Canadian daily newspapers members shall release one Brand Report each year for the twelve months ended December.

1-1 307

The twelve-month Brand Report forms the basis for an annual Brand Audit Report. The audit will be completed after the auditor's examination of the media owner's records. The audit period covered shall be no more than twelve months.

1-1 308

Brand data issued annually or semi-annually or has a lead distribution channel that releases data once in a twelve month reporting period, shall file one twelve month Brand Report, which will be checked upon receipt and, at the option of the media owner, printed and released by BPA Worldwide upon completion of processing. It shall be the basis for the twelve-month Brand Audit Report. The audit will be completed after the auditor's examination of the database records.

1-1 309

The audit will be performed wherever the records may be properly checked.

1-1 310

A Brand applicant, that has chosen for its initial audit report, an audit period ended with a month other than the end period for its type of media, shall transfer to the standard period end with its first report following the initial audit report and include whatever previously audited issues/deployments are necessary to complete the six month period.

1-1 311

A Brand Report as outlined in the preceding sections shall be filed with the Corporation within 15 days after the period which they cover. Brand members reporting 50% or more average qualified paid circulation in any one channel shall be granted a 15 day extension to this date. No member shall be granted an extension of time to file except with the consent of the CEO of BPA, who shall not grant an extension greater than 30 days for media owners reporting less than 50% average paid circulation or 45 days for Brand member reporting 50% or more average qualified paid circulation without a member showing that the filing delay is a result of extenuating circumstances clearly beyond the member's control.

Failure to file a Brand Report on or before the due date or the end date of an authorized extension, shall result in a suspension of services to the member and will subject said member to disciplinary action as outlined in Section B9.0 of the Bylaws.

At any time after the end date of an authorized extension, if the required Brand Report has not been filed, BPA Worldwide shall post an advisory to the BPA Worldwide website notifying the membership of the Brand's failure to file. All costs incurred in creating and posting an advisory shall be paid for by the Brand member.

No later than 60 days after the close of each reporting period, the BPA Worldwide website will display the status of production for each Brand Report that has not been posted to the website. For example, status reports for brand reports with the period ended June will be posted September 1st. These status reports will only include standard terminology approved by the Board of Directors. The previous period's report would be moved to "history" at this time.

When a Brand Report is received by BPA Worldwide 1 – 14 days after the stated due date and a proof copy created, the member shall advise BPA of the acceptance of the proof copy within 10 business days after the proof copy has been issued. Reports received 15+ days after the stated due date shall have 5 business days to accept the proof. However, for media owners filing reports prior to the stated due date and receiving a proof copy before the stated due date, the counting of business days for the acceptance process shall commence with the filing due date and not from the date the proof copy was created. For all others, final approval shall be received within 20 business days of receipt of the first proof. The CEO of BPA shall not grant an extension without a member showing that the delay in approving the proof copy is a result of extenuating circumstances clearly beyond the member's control.

Failure to advise BPA of the acceptance of the proof copy by this date shall result in suspension of services to the media owner and will subject said member to disciplinary action as outlined in Section B9.0 of the Bylaws. BPA Worldwide shall post an advisory on its website, notifying the membership of the media owner's failure to approve the proof copy. All costs incurred in creating and posting an advisory to the website, if any, shall be paid for by the media owner.

1-1 312

Printed copies of Brand Reports may be purchased by a member of the Corporation at a price established by the Board of Directors.

1-1 313

If not otherwise required as a result of audit, the printing and release of a Brand Audit Report shall be at the media owner's option.

1-1 314

All language and terminology shall be factual and auditable.

1-1 315

No facts, figures or written comments shall appear in Brand Reports other than those expressly authorized in these Standards.

1-1 316

A member may not claim nor imply that BPA Worldwide audits readership or intent to read.

1-1 317

In the event of a disagreement with a decision of the CEO of BPA, a member may request a hearing before an appropriate committee of the Board of Directors.

1-1 400 BRAND REPORT – CONTENTS

1-1 401 Overview

It is the media owner's option to include any combination of, or all channels of, content distribution in the Brand report. It may include a single channel i.e. a print publication's circulation, or it may include multiple channels.

Any channel(s) associated with a brand may be included on a Brand Report provided each has the same clearly defined target audience. Should a question arise, the CEO of BPA shall determine if additional channels are separate Brands.

Acceptable proof of the target audience shall be provided by the media owner.

Channels not referenced in these Standards may be included in a Brand Report provided permission is granted by the CEO of BPA and sufficient documentary evidence is provided at the time of audit.

The first page of the report shall contain the name of the Brand; brand's corporate or company name; principal telephone number; fax number; email address; website URL; address of the Corporation and corporate/brand logo. A Quick Response (QR) code may be included at the media owner's option.

1-1 402 About the Brand (Optional)

If included, shall contain details regarding the scope and reach of the brand. Editorial content is permissible; however, the content may not be promotional (subject to publicity standards, see Section 3-9 and separate Guidance Document) and shall be factual and auditable.

1-1 403 Magazine Channel Format

- 1) A statement shall be included to disclose the magazine's type of format. The media owner may include a description of the features of the format(s) and the types of devices for which the format is designed. The following are sample statements:

MAGAZINE CHANNEL FORMAT – PRINT AND DIGITAL ISSUES

MAGAZINE NAME is produced in print and digital formats. The editorial for the print copy is the same for all recipients. The digital format is written and designed for the digital reading experience, accessed by a computer, mobile phone, or tablet. Digital formats may include features such as videos and surveys allowing for user interaction with the brand.

OR

MAGAZINE CHANNEL FORMAT – PRINT ISSUES

MAGAZINE NAME is produced in a print format. The editorial for the print copy is the same for all recipients.

- 2) Each page of the Brand Report, which includes magazine channel data, shall have a note in the footer to disclose:

MAGAZINE CHANNEL FORMAT: This magazine is produced in print and digital formats.

OR

Magazine Channel Format: This magazine is produced in print format.

1-1 404 Brand Report Purpose Statement

A standard comment broadly describing the nature of the report. The comment shall identify if the data in the report is "integrated" "non-integrated" or a possibly a combination of both.

The Purpose Statement is optional for a single-channel Brand Report.

The following comment shall be included in the integrated Brand Report and combined integrated and non-integrated reports:

The Brand Report provides a deeper understanding and identification of all audited touch points with customers that have interest in the brand. It is designed to present a cross-section of all communication channels, including a brand's total recipients across multiple media platforms, unique users within each channel where it can be determined, and users accessing multiple channels.

The report contains a net, unduplicated count of individuals within an integrated database. When the end user is not identified, such as social media, integration for that channel is not possible, and therefore not required and reported separately as non-integrated channels.

Recipients receive multiple media channels of the Brand as indicated in the Executive Summary. The integrated Database Analysis Table reflects net unique individuals; individuals receiving only one channel; and the average number of channels received per individual. Channels for which the end user cannot be identified and therefore not integrated to identify unique individuals shall be fully disclosed in the report.

The following comment shall be included in non-integrated Brand Reports:

The Brand Report provides a deeper understanding and identification of all audited touch points with customers that have interest in the brand. It is designed to present analysis of all communication channels, including a brand's unique users within each channel of, but not across, multiple media platforms. This non-integrated report contains data for each separate media channel as indicated in the Executive Summary. No attempt has been made to identify or eliminate duplication that may exist across media channels.

1-1 405

Brand Reports that include a magazine channel shall include a Field Served and Definition of Recipient Qualification (Business publications) or Market Served (Consumer magazines). Newspapers shall include a Statement of Publishing and Circulation policy.

1-1 406

Brand Reports including supplementary or unit circulation data shall include the corresponding supplementary or unit Purpose Statement (See Sections 2-5 and 2-6).

1-1 407

Non-Integrated reports with 2 or more channels reported shall include the following footnote on all pages of the report:

No attempt has been made to identify or eliminate duplication that may exist across media channels.

1-1 408 Overall Brand Focus (Table of Contents)

At the media owner's option, a table of contents for the Brand Report may be listed.

1-1 409 Included Channels

A visual listing labeled as "Included Channels" to reflect all channels reported within the Brand Report shall appear on page one of the report. The disclosure of frequency or number of deployments in the audit period for all applicable channels shall be reported. The page number for the channel directs the user of the report where to find the data.

Averages for the audit period, other top line data and images of each channel shall be included.

App downloads shall be the cumulative total of all apps downloaded as of the end of the reporting period.

The month end totals for the last month in the reporting period shall be reported for each type of Social Media.

1-1 410 Executive Summary

- 1) The Executive Summary table shall include all audited channels in the brand and contain the number of occurrences and average for the period for each channel.
- 2) Paid and non-paid averages shall be reported in separate columns for each channel (except for app downloads which are reported as the cumulative total of all apps downloaded as of the end of the reporting period. Month end total shall be report for the last month in the reporting period for each type of Social Media).
- 3) **Channels (Appears above the EXECUTIVE SUMMARY)**
 - (a) **Magazine Channels**
 - i) The name of the magazine shall be stated with the indication if the format is only print, or both print and digital formats.

a. MAGAZINE CHANNELS WHEN ONLY PRINT FORMAT EXISTS



b. MAGAZINE CHANNELS WHEN PRINT AND DIGITAL FORMATS EXIST



- ii) When both Print and Digital magazine formats are being reported, average circulation shall be reported separately for each. At the publisher's option, each shall be further broken out by the source of circulation, either as, "Requested" or "All Other Sources", and the Executive Summary table shall be footnoted to indicate "Requested" includes, "Direct Request, Request from Recipient's Company and Membership Benefit". Separately, "All Other Sources" shall be reported to balance to the Total Qualified Circulation.
- iii) Media owners may report by digital magazine editions by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

(b) **Newspaper Channels**

Newspaper circulation shall be reported as required under the newspaper standards. Community and non-daily ethnic newspapers shall report the average totals by publishing day for Non-Paid Individual Circulation, Non-Paid Bulk Circulation and Paid Circulation. Daily newspapers shall report the average totals by Weekday Average, Saturday and Sunday (if published) for Paid for by Individual Recipient and Sponsored by Third Party or free.

If an Extended Market Coverage (EMC) edition is reported, the EMC edition is to be reported in place of the Sunday edition, and omitted from the Weekday Average with a disclosure made under Additional Data.

Newspapers that are FDSA accredited as of the end of the reporting period may declare "FDSA ACCREDITED" following the name of the publication.

Media owners may report newspaper E-editions by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

(c) **Email Newsletters**

Daily, weekly and monthly averages shall be reported as determined by the true frequency average for each separate email newsletter reported.

(d) **Events and Webinar**

The average number of attendees shall be reported. At the media owner's option, the average number of registrants may also be reported.

If reported, the average number of registrants shall not be included in the Six Month Average total. If reported, a footnote is required indicating that average registrants are not included.

(e) **Document Downloads (white papers, case studies, etc.)**

The average number of downloads or average distribution in the period shall be reported.

(f) **Websites**

The average number of monthly unique browsers shall be included.

If the media owner has a registration process for website access to content, the average number of unique monthly accesses may be reported. The media owner may report the average number of registered users; however, the number of registered users shall not be included in the six month average total (if reported).

(g) **Social Media**

Each type of social media, such as [but not limited to] Facebook, Twitter or LinkedIn shall be identified separately. The month end total for the last month in the reporting period shall be reported for each type of social media.

Users of social media can be reported at a more granular level than simply the total for the brand. For example, social media may be tied to specific content or journalists.

(h) **Apps**

The name of the App shall be included. The total number of downloads as of the end of the reporting period (cumulative figure, not the average) shall be reported in the Executive Summary. The app download table shall report the cumulative total app downloads as of the end of the prior reporting period and the number of app downloads each month. The cumulative total at the end of the period shall agree with the Executive Summary.

4) Media owners may include a Venn diagram illustrating overlap of channels at their option.

5) Example of Executive Summary Table:

a) EXECUTIVE SUMMARY: REQUIRED TABLE WHEN ONLY PRINT FORMAT EXISTS

EXECUTIVE SUMMARY			
Below are the average contacts per occurrence, including frequency per period reported.			
	Non-Paid	Paid	Average
THE CRITERION MAGAZINE (6 print issues in the period) (See Paragraph 3b for Source)	48,362	-	48,362
THE CRITERION E-NEWSLETTERS			
a. The Criterion E-Newsletter - 1 (12 issued in the period)	21,185	-	21,185
b. The Criterion E-Newsletter - 2 (6 issued in the period)	17,019	-	17,019
c. The Criterion E-Newsletter - 3 (3 issued in the period)	13,318	-	13,318
THE CRITERION EVENT TOTAL UNIQUE ATTENDEES	-	6,500	6,500
THE CRITERION IPAD APP	*5,700	-	*5,700
THE CRITERION WEBSITE (Monthly Users with 75,519 average Pageviews)	24,496	-	24,496
THE CRITERION SOCIAL MEDIA			
a. Twitter followers	*528	-	*528
b. Facebook likes	*1,969	-	*1,969
c. LinkedIn group members	*927	-	*927
*App downloads and Social Media claims are cumulative figures, not averages.			
Note 1: Shared media channel - The Criterion E-Newsletter - 1, The Criterion E-Newsletter - 2 and The Criterion E-Newsletter - 3 - serving both _____ and _____.			
Note 2: Shared media channel - www.thecriterion.com - serving both _____ and _____.			
Note 3: Shared media channel - Twitter followers and Facebook likes - serving both _____ and _____.			

b) EXECUTIVE SUMMARY: REQUIRED TABLE WHEN BOTH PRINT AND DIGITAL FORMATS EXIST

EXECUTIVE SUMMARY			
Below are the average contacts per occurrence, including frequency per period reported.			
	Non-Paid	Paid	Average
THE CRITERION PRINT AND DIGITAL MAGAZINE Unique Total* (6 issues in the period)	48,362	-	48,362
a. Print	39,344	-	39,344
b. Digital	11,018	-	11,018
(See Paragraph 3b for Source)			
THE CRITERION E-NEWSLETTERS			
a. The Criterion E-Newsletter - 1 (12 issued in the period)	21,185	-	21,185
b. The Criterion E-Newsletter - 2 (6 issued in the period)	17,019	-	17,019
c. The Criterion E-Newsletter - 3 (3 issued in the period)	13,318	-	13,318
THE CRITERION EVENT TOTAL UNIQUE ATTENDEES	-	6,500	6,500
THE CRITERION IPAD APP	**5,700	-	**5,700
THE CRITERION WEBSITE (Monthly Users with 75,519 average Pageviews)	24,496	-	24,496
THE CRITERION SOCIAL MEDIA			
a. Twitter followers	**528	-	**528
b. Facebook likes	**1,969	-	*1*,969
c. LinkedIn group members	**927	-	**927
*Unique Total represents unique recipients, not the sum of Print and Digital.			
**App downloads and Social Media claims are cumulative figures, not averages.			
Note 1: Shared media channel - The Criterion E-Newsletter - 1, The Criterion E-Newsletter - 2 and The Criterion E-Newsletter - 3 - serving both _____ and _____.			
Note 2: Shared media channel - www.thecriterion.com - serving both _____ and _____.			
Note 3: Shared media channel - Twitter followers and Facebook likes - serving both _____ and _____.			

c) EXECUTIVE SUMMARY: OPTIONAL TABLE

EXECUTIVE SUMMARY

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

	Non-Paid	Paid	Average
THE CRITERION PRINT AND DIGITAL MAGAZINE Unique Total* (6 issues in the period)			
a. Print			
1. Requested***			
2. All Other Sources			
b. Digital			
1. Requested***			
2. All Other Sources			
THE CRITERION E-NEWSLETTERS			
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)			
THE CRITERION EVENT TOTAL UNIQUE ATTENDEES			
THE CRITERION IPAD APP**			
THE CRITERION WEBSITE (Monthly Users with _____ average Pageviews)			
THE CRITERION SOCIAL MEDIA			
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.

1-1 411 Integrated Database Analysis (Integrated Brand Reports only)

Shall report the total Net unique individuals; Individuals receiving only one channel, and; Average channels received per individual.

Average channels received per individual is calculated by taking the gross of recipients of each channel, and dividing this total by the number of unique individuals.

A comment detailing the method of calculating the average channels received is required in the additional data section of the report.

Example of Integrated Database Table:

INTEGRATED DATABASE ANALYSIS

1a. INTEGRATED DATABASE ANALYSIS		
	NET UNIQUE INDIVIDUALS	65,613
	INDIVIDUALS RECEIVING ONLY ONE CHANNEL	22,826
	AVERAGE CHANNELS RECEIVED PER INDIVIDUAL*	2.3
*See Additional Data		

1-1 412 Communication Channels of the Brand (Integrated Brand Reports only)

Reports the gross number of individuals receiving each channel and cross tabulated by the additional channels the recipients receive.

Shall include rows and columns for all channels in the brand in the same sequential order as they appear in the Executive Summary.

Non-integrated channels shall be identified and reported separately from integrated channels on the right side of the table.

Media owners reporting Event and Webinar channels at their option may include registrant data in addition to required attendee data.

Example of Communication Channels Table:

COMMUNICATION CHANNELS OF THE CRITERION BRAND

1b. COMMUNICATION CHANNELS OF THE CRITERION BRAND
Each column/row reports the gross number of individuals receiving that channel, and the additional channels those recipients receive.
Since any one individual may receive more than one channel, the totals should not be added together as they exceed the total of unique individuals.

CHANNEL	INTEGRATED CHANNELS					NON-INTEGRATED CHANNELS				
	The Criterion Magazine	The Criterion Daily E-Newsletter	The Criterion Weekly E-Newsletter	The Criterion Monthly E-Newsletter	The Criterion Event Attendees	The Criterion Apps	The Criterion Website	Twitter followers	Facebook likes	LinkedIn group members
The Criterion Magazine	48,275	21,553	26,485	29,874	3,100	-	-	-	-	-
The Criterion Daily E-Newsletter	21,553	25,801	23,966	24,750	822	-	-	-	-	-
The Criterion Weekly E-Newsletter	26,485	23,966	31,965	25,665	1,525	-	-	-	-	-
The Criterion Monthly E-Newsletter	29,874	24,750	25,665	35,111	2,459	-	-	-	-	-
The Criterion Event Attendees	-	-	-	-	6,500	-	-	-	-	-
The Criterion Apps	-	-	-	-	-	1,254	-	-	-	-
The Criterion Website	-	-	-	-	-	-	24,870	-	-	-
Twitter followers	-	-	-	-	-	-	-	499	-	-
Facebook likes	-	-	-	-	-	-	-	-	1,940	-
LinkedIn group members	-	-	-	-	-	-	-	-	-	921

Note 1: Unique Browsers: See Website Glossary in Channel profile.

1-1 413 Channels Received (Integrated Brand Reports only)

Identifies the total number of unique individuals who received single or multiple channels cross tabulated by all channels.

Shall include rows and columns for all channels in the brand in the same sequential order as they appear in the Executive Summary.

Non-integrated channels shall be identified and reported separately from integrated channels on the right side of the table.

Media owners reporting Event and Webinar channels, at their option, may include registrant data in addition to required attendee data.

If website data is reported for the brand, a footnote referring to the Unique Browsers is required.

Example of Channels Received Table:

CHANNELS RECEIVED

1c. TOTAL UNIQUE INDIVIDUALS											
CHANNEL	INTEGRATED CHANNELS					NON-INTEGRATED CHANNELS					TOTAL UNIQUE INDIVIDUALS
	The Criterion Magazine	The Criterion Daily E-Newsletter	The Criterion Weekly E-Newsletter	The Criterion Monthly E-Newsletter	The Criterion Event Attendees	The Criterion Apps	The Criterion Website	Twitter followers	Facebook likes	LinkedIn group members	
MULTIPLE CHANNEL RECIPIENTS	39,460	23,491	29,956	31,482	3,800	-	-	-	-	-	42,631
SINGLE CHANNEL RECIPIENTS	8,815	2,310	2,009	3,629	2,700	-	-	-	-	-	22,982
TOTAL	48,275	25,801	31,965	35,111	6,500	1,254	24,870	499	1,940	921	65,613

Note 1: Unique Browsers: See Website Glossary in Channel profile.

1-1 414 Combined Demographic Profile of Unique Individuals (Integrated Brand reports only; reported at the media owner's option)

An analysis of the Business/Occupational demographics for the non-duplicated net unique individuals in the brand. This data may be cross tabulated with other audited demographics for unique individuals.

Data reported shall be from the analyzed issue for each channel. A footnote detailing the issue analyzed for each channel shall be included.

If the media owner elects not to report this table, but includes a magazine channel, the following comment shall appear on the Brand report:

Not reported at the option of the media owner. Magazine demographic profile reported on page (number).

Example of Combined Demographic Profile of Unique Individuals Table:

COMBINED DEMOGRAPHIC PROFILE OF UNIQUE INDIVIDUALS (ALL APPLICABLE CHANNELS)

1d. BUSINESS/OCCUPATIONAL BREAKOUT							
CHANNELS	TOTAL	PERCENT OF TOTAL	TITLE				
			Executive Directors/VPs	Managers	Other Titled and Non-Titled Personnel	Unknown/No Answer	
Aerospace/Defense	3,841	5.9	1,976	882	372	611	
Agriculture/Mining/Gas/Oil	1,963	3.0	1,176	343	40	404	
Automotive/Transportation	1,800	2.7	1,231	321	37	211	
Business Services/Consultants	4,728	7.2	3,829	-	-	189	
Construction/Architecture/Engineering	9,991	15.2	8,145	-	-	422	
Education/Training	13,428	20.5	10,432	-	-	840	
Energy/Utilities/Communications	7,001	10.7	4,896	-	-	63	
Finance/Accounting/Banking	4,026	6.1	2,022	-	-	30	
Government: Federal/State/Local/Military	5,977	9.1	2,797	-	-	150	
Manufacturing	4,188	6.4	1,850	1,911	309	120	
Other	3,347	5.1	999	532	209	1,607	
Unknown/No Answer	5,332	8.1	-	-	-	5,332	
TOTAL RECORDS	65,613	100.0	39,353	14,187	2,094	9,979	

*The Criterion Magazine as of November 2020, daily E-Newsletter as of November 28, 2020, weekly E-Newsletter as of November 29, 2020, monthly E-Newsletter as of November 2020. Criterion App as of December 31, 2020.

1-1 415 Channel Frequency Table (optional)

If reported, this table displays the six-month activity for the period for each channel of the brand. All channels in the Executive Summary shall be included and appear in chronological date order by channel.

Channel frequencies with weekly or less distribution/deployment or occurrence shall be reported as the actual date of distribution or occurrence. A footnote shall be included to indicate whenever the reporting of an average is used for any channel that has distribution/deployment/occurrence that is greater than weekly.

The six month average for each channel shall be included.

Specific requirements for each channel is as follows:

Magazines (Business or Consumer) and Newspapers shall report the total qualified circulation for each issue in the period. Columns for Paid and Non-Paid, Print and Digital, and additions and removals may be reported at the media owner's option. Newspaper shall report monthly averages paid, non-paid.

E-Newsletters may report daily and weekly e-newsletters as weekly or monthly averages.

All event data such as attendance at live events or webinars shall be reported on the date of each occurrence. Registrant data may be reported at the media owner's option.

The average monthly document downloads (white papers, etc.) shall be reported. Additional download data may be reported at the media owner's option and footnoted that the figures are total downloads per month.

For websites, the monthly unique browser figures shall be reported. Weekly figures may be reported at the media owner's option.

Social Media may be reported by type as monthly total or aggregated per month.

App download activity for each month shall be reported. The total downloaded averages are reported at the bottom of the table.

1-1 416 Geographic Distribution

Shall report the distribution by geographic region for each channel in the brand using standard geographic reporting.

Data shall be actual figures from the analyzed issue for each channel.

(a) Channels required to report geographic data:

- Magazines
- Newspapers
- Events (attendees required, optional to report registrants)

(b) Channels that may report detailed geographic data at the media owner's option:

- E-newsletters
- Webinars (attendees required, optional to report registrants)
- White Papers

(c) Channels that cannot report geographic data unless it is collected. However, if collected it may be reported at the media owner's option:

- Websites
- Social Media
- Apps

1-1 417 Brand Channel's Profiles

Channel profiles detailing data specific to each unique channel shall be separately reported in these sections in the Brand Report.

The sections shall appear in the same sequential order as in the Executive Summary. The analyzed issue, event or occurrence, etc., and topline average figures for each channel shall be disclosed. The use of graphics to identify each channel (logo and coversheet) shall be optional.

Top line average figures, logo and cover shot (optional).

Source tables are required to be reported for all magazines channels. (Age data for Source is optional for business publications. See Section 1-2 408A). Source and age tables may be reported for other channels at the media owner's option provided that the data can be proven at the time of audit.

Additional Brand channels not detailed in this section may be reported provided complete and accurate audit trails exist. Reporting factors shall be determined at that time.

(a) Business Publication Brands (See 1-2 400)

The Business Publication reporting format shall include the following elements:

- The official publication of:
- Year established
- Frequency
- Paragraph 1-Average Non-Qualified Circulation for the Period
- Paragraph 1-Average Qualified Circulation for the Period
- Paragraph 2-Issue by issue totals that may be reported in the optional Frequency table are required to be reported in this section. The media owner has the option to report additions and removals, paid and non-paid breakouts.
- Paragraph 3a-Business/Industry Breakout of Qualified Circulation (optional to report supplementary data)
- Paragraph 3b-Qualified Source/Age Breakout of Qualified Circulation. This source and age data is required for non-paid circulation only. (Age data for Source is optional for business publications. See Section 1-2 408A).
- Paragraph 3c-Mailing Address Breakout of Qualified Circulation (optional)
- Paragraph 4-Geographic distribution table
- Prices and Promotional incentive tables (optional)
- Three-Year Calendar Analysis (optional)

(b) Consumer Magazine Brands (See 1-3 400)

The Consumer magazine reporting format shall include the following elements:

- The official publication of:
- Year established
- Frequency
- Summary Section of Average Qualified Circulation
- Paid Circulation Price and Frequency
- Paragraph 1-Average Qualified Circulation Breakout for the Period
- Paragraph 2-Issue by issue totals that may be reported in the optional Frequency table are required to be reported in this section. The media owner has the option to report paid and non-paid breakouts.
- Paragraph 3-Consumer Markets Served
- Paragraph 4 -Qualified Source/Age breakout of Qualified Circulation. This source and age data is required for non-paid circulation only.
- Paragraph 5-Geographic distribution table
- Prices and Promotional incentive tables (optional)
- Three-Year Calendar Analysis

(c) Email Newsletters (See 1-6 400)

The Email Newsletters reporting format shall include the following elements:

- Date of distribution of all deployments
- Name or title, images, demographics and other details regarding content, focus or distribution (optional)
- Email Newsletter members shall report the average number of net delivered newsletters and qualified paid and non-paid distribution separately.

(d) Events

The Events reporting format shall include the following elements:

- Name, date, location and number of attendees
- Statement of Verification Methodology
- At the option of the media owner full demographic information for a specific event, number of registrants, images and other details about the event may be reported.

(e) Canadian Community Newspapers (See 1-7 400)

The Canadian Community Newspapers reporting format shall include the following elements:

- Date established
- Frequency
- Publisher's stated publishing and circulation policy information
- Paragraph 1-Average qualified circulation breakout for period by edition: non-paid individual circulation, non-paid bulk circulation and paid circulation
- Paragraph 2-Average quarterly circulation by edition: non-paid individual circulation, non-paid bulk circulation and paid circulation
- Paragraph 3-Analysis of circulation by analyzed editions. Map of Distribution
- Glossary of Terms
- Return and allowance for unsold copies disclosure
- Premium, combination and other special offers disclosure
- Arrear disclosures
- Price disclosures
- Additional data

(f) Canadian Daily Newspapers (See 1-8 400)

The Canadian Daily Newspapers reporting format shall include the following elements:

- Date established
- Frequency
- Publishing and circulation policy
- Average circulation for the period by weekday average and each publishing day
- Paragraph 1-Average circulation for the period by weekday average and each publishing day: paid for by individual recipient and sponsored by third-party or free
- Paragraph 2a-Average monthly circulation for the period by weekday average and each publishing day: paid for by individual recipient and sponsored by third-party or free
- Paragraph 2b-Average circulation for the period by weekday average and each publishing day by geographical breakout: paid for by individual recipient and sponsored by third-party or free.
- Premiums, combinations and other special offers disclosure
- Arrears under three months
- Prices
- Additional data

(g) Newspapers (See 1-9 400)

The Newspapers reporting format shall include the following elements:

- Date established
- Frequency
- Publishing and circulation policy
- Average circulation for the period: paid, non-paid

- Monthly circulation for the period: paid, non-paid
- Geographic distribution table
- Premium disclosures
- Arrear disclosures
- Price disclosures

(h) **Webinars**

The Webinars reporting format shall include the following elements:

- Name, date and number of attendees
- At the option of the media owner full demographic information for a specific webinar, number of registrants, images and other details about the webinar may be reported.

(i) **Document Downloads (white papers, case studies, etc.)**

The reporting format shall include the following elements:

- Total downloads by name and month
- At the option of the media owner images, details regarding content and date released may be reported.

(j) **Websites**

The Websites reporting format shall include the following elements:

- Month by month figures for: Page Views, Sessions, Users, and Average Session Duration
- Average monthly total for the period
- Website glossary
- Website address and headline information
- Third party demographic information (optional)

(k) **Social Media**

The Social Media reporting format shall include the following elements:

- Beginning balance from the end of prior reporting period
- Monthly totals for the period
- Month-end total for the last month in the reporting period shall agree with the figure reported in the Executive Summary.

(l) **App Downloads**

The App downloads reporting format shall include the following elements:

- Name of App
- Beginning balance of cumulative downloads from the end of the prior reporting period
- Total monthly gross downloads
- Cumulative total downloads by month
- Cumulative total downloads agree with the figure reported in the Executive Summary

The following comment shall appear on all brand reports that include Apps:

Total downloads represent the aggregate number of downloads of the (name) App, not copies. Information regarding the App deletion and/or removal is not available from third party vendors and has not been removed from these figures.

1-1 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

The media owner may choose to report and audit an integrated database (single relational database) or report and audit the database of each channel separately.

For non-integrated audits, refer to the following standard sections for specific requirements and records needed for the following audits:

- 1-2 500 Business Publications
- 1-3 500 Consumer Magazines

- 1-4 500 Database
- 1-5 500 Document Download
- 1-6 500 Email Newsletter

Newspapers:

- 1-7 500 Canadian – Community Newspapers
- 1-8 500 Canadian Daily Newspapers
- 1-9 500 Global – Daily with other
- 1-10 500 Social Media
- 1-11 500 Webinar
- 1-12 500 Website

1-1 501 Integrated Database Audit Requirements

The integrated database files shall be a snapshot (data set frozen at a point in time) for the analyzed issue in the reporting period (See 1-1 204).

The integrated file shall contain a unique identifier for each name and links them to all forms of various media that has been requested or is being sent, or with which the individual is engaged.

It shall include all relevant qualifying details (if applicable) such as [but not limited to] contact information, address information, any necessary qualifying characteristics such as, company information, job title, any other demographic data, all requests to receive or engage with the various channels available, and the date of the request/engagement.

The media owner shall be able to determine from the file the net number of unique individuals it contains.

1-1 502 “Email Address Only” Records

Should an integrated file contain 3.0% or greater email newsletter recipients identified by email address only, the following comment shall appear as a footnote below the Channels Received table:

Note: Email newsletter recipients that provided email address only are reported as “single channel” recipients although they may receive more than one channel. E-mail address only recipients do not have enough information to conduct cross channel reconciliations.

The following comment shall appear in the explanatory paragraph, Additional Data section and be cross referenced to the Executive Summary:

Since email address only recipients do not have enough information to conduct across channel reconciliation, these recipients are not included in the “Net Unique Individuals” (Individuals Receiving Only One Channel) and “Average Channels per Individual” calculations.

1-1 503 Pre-Audit Requirements

Data for all channels shall be checked to ensure that the systems of the media owner companies and their vendors are in compliance with BPA Worldwide standards and policies before such data may appear for the first time on a Brand Report. A special audit may be undertaken to verify the channel data.

A media owner in good standing may request an audit for additional channels, not already included, on the Brand Report. The Corporation shall make an examination of the records and complete the channel specific audit at the same time as the regular annual brand audit or prior to the release of the next Brand Report.

If it is found that the records are incomplete and the audit of the additional channel cannot be completed, the media owner shall install and maintain such auditable records as recommended by the Corporation. The media owner may attempt another audit at a later date.

If a media owner opts to include a new channel that has been previously approved and included on another Brand Report owned by the same media owner, a special audit will not be required.

1-1 600 BRAND REPORTS: CONFERENCES AND EVENT ATTENDANCE

Standalone tradeshow audits are available under a separate service offered by iCompli Event Audit™, a division of BPA Worldwide. The standards that follow in Section 1-1 600 are for conferences and event attendance of a Brand.

1-1 601 Reporting Requirements

Only events that take place in the period covered by the Brand Report may be included.

Media owners may, at their option, report additional data such as attendance duration, provided sufficient documentation is available to the auditor. Should a media owner wish to report any such additional data, it shall first be approved by the CEO of BPA.

1-1 602 Requirements and Records Necessary for an Audit

1-1 603

The media owner shall make available all applicable paperwork for all events in the audit period. Items may include applications/contracts, pre-show questionnaires and proof of payment.

1-1 604

The event database provided shall be de-duplicated and include the list of all registrants and attendees; full registrant contact details including name, address, phone number and email address; date and time of attendance verification or applicable verification code; method of registration and any/all applicable demographic information (if being reported). Daily visit data should be included if attendees were offered and attended multiple days.

1-1 605

Event attendees shall be counted only once in the attendance and/or registration database.

1-1 606

Sample hard copy and online registration pages/forms shall be provided (and pre-approved if possible) for all events included in the audit period.

1-1 607

Event demographics may be included on a Brand Report at the option of the media owner. Demographic data can be used from the current event being reported or from a secondary source related to the Brand. These demographics may be no older than three years from the date of the event. It is allowable to use secondary sources for the demographic data such as a magazine database or a channel other than an event, provided it is no more than three years old.

1-1 608

Proof of registration (if applicable), including that from third parties, shall be available and provided for all attendees and or registrants selected for the audit test.

1-1 609

Confirmation of attendance and/or registration shall be conducted by the auditor.

1-1 610

All records necessary for validation of event data shall be retained by the media owner and made available to the Corporation upon request.

1-1 611

Any other records deemed necessary by the Corporation in the fulfillment of its service shall be made available.

1-2 BUSINESS PUBLICATIONS

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1-2 BUSINESS PUBLICATION STANDARDS

1-2 100 ELIGIBILITY – BUSINESS PUBLICATIONS

1-2 101

A media brand applying for membership shall qualify as stated in Section B2.0 of the Bylaws, and shall conform to the following requirements:

It shall be a business publication which is hereby defined as one where every issue is sent to one or more specific businesses, industries, trades, occupations, or professions with clearly defined limits, recognized by the industries or groups that it serves.

It may be a catalog independently operated and independently distributed and one which accepts competitive advertising, if otherwise qualified under the Bylaws and Standards.

It shall be a publication which includes advertising.

It shall practice qualified circulation as defined in Section 1-2 201 of these Standards, and shall have done so for at least three months before being eligible for an initial audit.

1-2 102 Extra (Special) Issues

When a publication has extra issues such as directories, catalogs or buyer's guides, the CEO of BPA shall determine whether the publication is a single qualified publication or is, in effect, two or more separate publications requiring separate memberships and separate brand reports and audit reports for each issue on the basis of the following conditions:

The extra issue is distributed to all or a specifically designated portion of the circulation list of the regular publication.

The extra issue is identified on its cover as a special issue of the primary publication.

The masthead of each issue reflects the frequency which includes the extra issue.

If, after consideration of the above conditions, the CEO of BPA determines that the publication is, in effect, a single publication, the publication shall report the extra issue (directories, catalogs or buyer's guides) in paragraph 2 of the brand report, but not in paragraph 1 if the extra issue is distributed to less than the identical circulation list as that of the regular publication, and a suitable explanation shall be made in the explanatory paragraph, Additional Data subject to audit.

1-2 103 Separate Editions

When a publication has separate Editions, either print or digital, such as demographic or geographic, the CEO of BPA shall determine whether the publication is a single, qualified publication or is, in effect, two or more separate publications requiring separate memberships and brand reports. To qualify as a single publication, the separate Editions shall meet all of the following conditions:

Shall have the same recipient qualification and shall serve the same field within a business or service market.

The qualified recipients on the lists shall be in the same business, occupation, etc.

Fifty percent of the editorial content shall be common in words, not layout, between/among all Editions. Geographic Editions require only common editorial scope. In both types of Editions, advertising need not be common between/among Editions.

The Editions shall be identified separately on advertising rate source material and in circulation promotion. In advertising rate source material, separate reference to each Edition's frequency, issuance and closing dates is required.

If, after consideration of the above conditions, the CEO of BPA determines that the publication is, in effect, a single publication, the media owner will be given the option to report the circulations for each edition separately.

If the media owner opts to report each edition separately, the media owner shall be required to report as follows:

Separate tables may be used rather than columns to report the editions in paragraphs 3a, 3c, and 4.

Separate paragraphs 1 and 3b analyses are required for each edition.

Additions and removals, if reported, shall be reported by issue, not edition, in paragraph 2 (See 1-2 238).

All editions shall be reported in accordance with the above.

If the frequency of the edition does not give cause to publish the edition with the analyzed issue, a reporting of the edition shall still occur in paragraphs 3a, 3b, 3c, and 4 by reporting the results of the edition's circulation selection criteria against the analyzed issue's circulation file.

1-2 104 Supplements

When a publication has a supplement, as defined by local postal regulations, the CEO of BPA shall determine whether the publication is a single qualified publication or is, in effect, two or more separate publications requiring separate memberships and brand reports for each publication.

In order to qualify as a single publication, the host publication and the supplement shall meet all of the following conditions:

The supplement shall have the same recipient qualification and shall serve the same field within a business or service market as the host magazine.

The qualified recipients on the lists shall be in the same business, occupation, etc.

The supplement's recipients may be a subset of the host magazine's qualified recipients.

The supplement shall be identified separately on advertising rate source material and in circulation promotion. In advertising rate source material, separate reference to each supplement's frequency, issuance and closing dates is required.

If, after consideration of the above conditions, the CEO of BPA determines that the supplement may be reported within the host circulation report the media owner, shall be required to report as follows:

Separate tables shall be used to report the supplement in Paragraph 3a. Paragraph 3a shall include a footnote disclosing the recipient selection criteria.

Reporting of supplements shall be required in Paragraph 2 by issue date (See 1-2 406). Additions and removals, if reported, shall be reported by issue, not by supplement.

All supplements shall be reported in accordance with the above.

If the frequency of the supplement does not give cause to publish the supplement with the analyzed issue, a reporting of the supplement shall still occur in Paragraph 3a by reporting the results of the supplement's circulation selection criteria against the analyzed issue's circulation file.

Based on US Postal regulations, US based publications shall also conform with the following:

A publication supplement shall be one or more pages formed by one or more printed sheets that are not bound into the publication.

A supplement may be devoted to a single topic and may contain material different from that in the host publication, but there shall be common editorial scope.

Bound Publication

- A loose supplement to a bound publication shall contain at least 25% non-advertising matter and bear the endorsement "Supplement to" followed by the title of the publication or the name of the media owner.
- A bound publication with one or more supplements not bound into the publication shall be enclosed in a wrapper.
- If a supplement to a bound publication is formed of more than one sheet, all sheets making up the supplement shall be bound together.

Unbound Publication

- A supplement to an unbound publication shall be combined with and inserted within the publication.
- If the supplement is included loose outside the unbound publication, the publication and its supplement shall be enclosed in a wrapper or envelope, and the supplement shall bear the endorsement "Supplement to" followed by the title of the publication or the name of the media owner.

Based on UK Presstream regulations, UK based publications shall also conform with the following:

- Supplements (excluding catalogues, directories, brochures, product cards and loose inserts) which do not constitute separate periodicals-either available for purchase or distributed in their own right-shall be related to a periodical and distributed to the same address list as the periodical itself.
- The supplement shall carry on its front cover the date/month/season and title of the periodical to which it is a supplement.
- The supplement shall be published by the same media owner as the periodical.

For all other publications, local postal regulations and definitions of a "supplement" shall prevail.

If, after consideration of the above conditions, the CEO of BPA determines that the publication is, in effect, a single publication, the media owner will be given the option to report the circulation and any special marketing data (i.e. Units, buying influence, etc.) of the supplement at the end of the regular brand report.

If the frequency of the supplement does not give cause to publish the supplement with the analyzed issue, and the media owner opts to report the supplement at the end of the regular brand report, an additional analysis and audit test will be required of the issue which includes the supplement.

1-2 105 Single Publication – Optional Separate Memberships

When the CEO of BPA determines that the publication is, in effect, a single publication, but the media owner wishes separate brand reports for each edition or supplement, separate memberships and audit fees will be required.

1-2 200 DEFINITIONS AND REPORTING REQUIREMENTS

1-2 201 Qualified Circulation

That circulation for which the mailing address conformance to the Field Served and Definition of Recipient Qualification, and correct classification in Paragraph 3a, are verified by auditable documentary evidence dated as shown in Paragraph 3b of the brand report (Reporting Paragraph 3b is required for non-paid circulation and optional for paid circulation.)

When publications report separate Editions in Paragraph 2, this standard shall be applied separately to each Edition.

1-2 202 Qualified Recipients

Recipients who meet the media owner's definition of recipient qualification within the field served.

1-2 203 Field Served

A statement by the media owner describing one or more specific businesses, industries, trades or professions with clearly defined limits. (See 1-2 403).

1-2 204 Definition of Recipient Qualification

A statement by the media owner describing one or more specific groups of recipients who have common interest with clearly defined limits, to whom the publication is directed (See 1-2 403).

1-2 205 Qualification Period

The age of documents used to qualify circulation in paragraph 3b of the brand report. The maximum qualification period is three years ended with any day between and including the analyzed issue "close" date to produce the label file through the last day of the issue analyzed.

The cutoff date may change from year-to-year. The publisher is free to choose the end date provided it is in compliance with the above.

The auditor shall not accept any qualification source dated outside the qualification period.

1-2 206 Qualified Non Paid Circulation

That circulation which meets the definition for qualification which is distributed free of charge to the recipient (See 1-2 201).

Details regarding offers with promotional incentives (for both qualified paid and non-paid circulation) shall be reported in the explanatory paragraph, Additional Data of the brand report identifying the premium and quantity used for the analyzed issue (See 1-2 224).

Details regarding offers (for both qualified paid and non-paid circulation) with sweepstakes, prize draws or contests, shall be reported in the explanatory paragraph, Additional Data of the brand report, regardless of whether or not paragraph 3b, source/age table, is reported (See 1-2 236).

1-2 207 Qualified Paid Subscription Circulation

That circulation which is not for resale, meets the definition for qualification and the requirements listed below.

Subscription payment orders shall conform to the following conditions:

It may be paid for at any price, and shall not be free of charge.

Subscriptions sold with a portion of the proceeds going towards a charitable contribution shall exclude the charitable contribution from the subscription order amount.

A subscription for less than one year, the price of which was less than 50% of the base annual price, cannot be served copies after the expiration date.

Payment shall not be delinquent for more than six months after the beginning of the subscription service.

A subscription that is ordered for which no payment had been received is considered a credit subscription. A credit subscription shall be counted as paid circulation up to six months from the date of the first issue served. If payment for such subscriptions has not been received within six months from the date of the first issue served, such copies shall be deducted from the qualified paid circulation for all copies served during this period.

A subscription sold on a “renew until forbid” basis may be reported as paid circulation until the subscriber cancels. All copies served from the moment the consumer cancels the subscription until the media owner receives notification of the cancellation, shall be reported as paid circulation as long as the media owner receives payment for the issues served (either from the consumer or agent). If the media owner is debited for unpaid copies served, then only the copies served which meets the arrears criteria may be reported in paid circulation (See 1-2 210).

No promotional incentive or other inducement may be offered which has an advertised value, or cost to the media owner, of more than 50% of the subscription offer price.

Subscriptions sold with an advertising contract shall be paid in addition to the regular advertising contract; and shall give the advertiser the option of deducting the subscription price from the contract if they do not wish to receive the publication.

Subscriptions sold via the redemption of affinity program points, e.g. frequent flyer miles, loyalty program points, etc., shall adhere to the following guidelines:

Participants shall elect to participate in the program.

The earning of miles, points, etc., shall be transaction based. For example, points earned for credit card purchase/ borrowing activity and purchase of air travel, hotel stays, or car rentals, etc. qualify.

Points earned without transaction activity (no financial transaction occurs) do not qualify for redemption as paid circulation.

Points shall be accruable towards future redemptions.

Points awarded upon enrollment shall be less than 50% of the lowest valued product/service offered in the program.

All affinity point programs shall offer non-magazine products/services. Magazines may not represent more than 75% of each program.

The value of all products and services shall be disclosed, in both monetary values and points.

The value of non-magazine products/services shall be equal to or greater than the lowest valued magazine.

The redeemable units of measure, e.g. miles, shall have a recognizable and accepted monetary value.

Adequate documentation of the transfer or redemption of frequent flyer miles and points shall be made available to the audit staff.

The CEO of BPA shall have final approval of all affinity programs prior to acceptance for use in obtaining qualified paid circulation.

Subscriptions sold using frequent flyer miles as payment must be disclosed in the explanatory paragraph, Additional Data cross-referenced to paragraph 3a (See 1-2 411a).

Copies exchanged for goods or services, or sold without using money (barter) may be claimed as qualified paid (barter) circulation providing:

The requirements relating to qualified paid circulation have been met.

The goods and services exchanged must have been sold in the public domain over the last twelve months and have a clearly identifiable and established market value.

The media owner is in possession of a written agreement with the purchaser, supported by invoiced transactions showing the quantities of copies/goods and services bartered and their value.

The media owner has provided proof that the barter transactions have been recorded in the publishing company's accounting system and subsequent financial statements.

The value of the copies sold is not subsequently redeemed by free advertising.

The goods or services provided in exchange for the publication are not related to the supply of the publication (e.g. costs for distribution or marketing of the publication).

1-2 208 Paid as Qualifying Standards

Paid Subscribers and single copy sales may be standards to establish qualification. Paid circulation without demographics may be reported as qualified circulation provided that conformance to qualified paid circulation standards is present (See 1-2 204 and 1-2 403).

TERMINOLOGY/DEFINITIONS AND DISCLOSURE COMMENTS (where applicable)

1-2 209 Advanced Renewals

A subscription renewed prior to expiration date of previous subscription.

1-2 210 Arrears (Post-Expire Copies Included In Qualified Paid Circulation)

Subscriptions reported as paid that are retained on the circulation list after their expiration date, for up to 25% of the original term ordered, with a maximum of three months, six months for international circulation. The numbers of arrears copies over total qualified circulation for the analyzed issue, expressed as a percentage, shall be reported in the explanatory paragraph, Additional Data as "Post-Expire Copies included in Total Qualified Circulation."

Multi-copy to the same addressee subscriptions cannot be reported as paid circulation after the expiration dates.

Publications issued on a regular frequency but less often than monthly or have a break in service, e.g., published seasonally, may serve arrears as paid circulation subject to the approval of the CEO of BPA (See 1-2 207).

Publications issued weekly may use a common monthly expire date. Following this common expiration date, service of arrears is permissible for the full three months.

If a common expire date by month is used by a weekly publication, the following comment shall be included in the explanatory paragraph, Additional Data:

This publication has a weekly frequency and uses a common expire date in each production month. Therefore, a subscriber may receive one to three additional copies beyond the three months of service permitted as 'Arrears' after the subscription expired, and are not reported as such.

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration date for domestic circulation and six months after the expiration date for international circulation.

1-2 211 Average Annual Order Price

"Average Annual Order Price" shall be reported in the explanatory paragraph, Additional Data. Average price shall be calculated by totaling the gross dollar value of all orders received during the reporting period (inclusive of promotional incentives) and dividing this total by the gross total number of copies ordered. The resulting average unit price would then be multiplied by the basic annual term to yield the average subscription price for the period.

When multiple currencies are collected, the media owner shall convert the multiple currencies into one home currency of choice to compute Average Annual Order Price.

Publications with 50,000 or less average total qualified circulation, and less than 5% average qualified paid circulation in paragraph 1, are not required to report average annual order price. Publications with more than 50,000 average qualified circulation in paragraph 1 have the same reporting option when the average qualified paid circulation is less than 2%.

For determining average annual price for combined sales, see 1-2 213.

1-2 212 Base Prices

Subscription Sales - The established prices for each subscription term as defined in the masthead of a publication or online. Only one base price per country may be established for each subscription term.

Single Copy Sales - The suggested retail cover price shall be the base price.

See 1-2 233 Subscriptions Extensions for guidance on changes to base price or frequency.

1-2 213 Combined Sales

Subscriptions to multiple publications or publications and products or services sold together at a special rate, and charitable donations combined with non-deductible subscriptions (See 1-2 411).

Comment shall be made in the explanatory paragraph, Additional Data providing details of the number of copies of each publication sold in combination with another publication/product/service.

A media owner may disclose the value of each item of the combination sale. In the absence of individual item disclosures, the value of the subscription will be calculated as follows:

In order to determine the value of the subscription, first sum the recognized retail value (base value) of all the individual elements of the combination offer. The ratio of the bundled offer price to the sum of the individual elements determines the discount rate. This rate is applied to the base rate of the publication to determine the "Average Annual Subscription Order Price for the Period Reported."

Example offer:

12-month subscription to XYZ (base rate \$20.00)
1 widget (value \$15.00)
3 Months Risk Free access to a Web site (base value \$25.00)
Combination Rate: \$25.00

Calculation: $\$20.00 + \$15.00 + \$25.00 = \60.00
Offer = $\$25.00 / \$60.00 = 41.6\%$
Discounted Magazine Price: $.416 \times \$20.00 = \8.33

The value of \$8.33 would then be used in calculating the "Average Annual Subscription Order Price for the Period Reported."

Publication subscriptions sold in combination with other publication subscriptions or products or services shall be reported in the explanatory paragraph, Additional Data.

1-2 214 Combined Sales: Multiple Media Channels of the Same Brand

Subscriptions to multiple media channels of the same brand, including but not limited to: publication, website access, email newsletters, webinars, white papers, etc. sold together at a special rate. The price paid for the combined offer shall be used to determine the value of the subscription. Comment shall be made in the explanatory paragraph, Additional Data providing details of the number of subscriptions sold in combination with other branded media channels.

1-2 215 Credit Subscriptions

A subscription that is ordered for which no payment has been received. Credit subscriptions shall adhere to qualification requirements per paid circulation (See 1-2 207).

1-2 216 Expiration Date - Terminating the Date of Subscription

Publications issued weekly may use a common monthly expire date.

1-2 217 Extension

Advancing the expiration date of a subscription because of a reduction in the frequency of issues or a reduction in the subscription price (See 1-2 233).

1-2 218 Gift Subscriptions

Subscriptions purchased for persons who are friends and family, and not the purchaser's employer.

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration date for domestic circulation and six months after the expiration date for international circulation.

Gift Subscriptions shall be reported as "individual" only when the media owner has documentary evidence showing that the copies are individually addressed. If not, they shall be reported as Multi-Copy Same Addressee.

Money collected by an agent need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor) (See 1-2 503).

If reporting paid circulation in the source/age table, gift copies are reported as "Other Sources."

1-2 219 Group Subscriptions

Purchased in lots of two or more, paid for by an employer for their employees and mailed by the media owner to individual addresses furnished by the employer. These subscriptions shall be reported as "individual."

Copies purchased in lots of two or more, paid for by an employer for their employees and mailed by the media owner to the same addressee shall be reported as "Multi-Copy Same Addressee".

Money collected by an agent need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor) (See 1-2 503).

1-2 220 Membership Benefit Subscriptions - Defined

Deductible Membership Benefit Subscriptions: Individual subscriptions paid for out of membership dues, where recipients have the option of deducting the subscription price from their dues if they do not wish to receive the publication.

Non-deductible Membership Benefit Subscriptions: Individual subscriptions paid for out of membership dues, where recipients do not have the option of deducting the subscription price from their dues, and automatically receive the publication.

Non-paid subscriptions shall only be reported as membership benefit if the publication is owned and published by the association, or if the board of directors of the association/membership passes a board resolution stating the publication is a membership benefit. The association/society does not need to own the publication for it to be a membership benefit.

Associations/memberships purchasing subscriptions for their members shall not be reported as membership benefit, such subscriptions shall be reported as sponsored sales (See 1-2 231).

Deductible and non-deductible membership benefit subscriptions need not be the “official” publication of the association/membership.

The non-deductible offer may be for a digital version of a publication without receiving a specific request to receive the publication electronically (See 1-2 514n). However, with each delivery of a digital copy (or its email alert), the member must be given the opportunity to opt out of receiving the copy in digital format. Those opting out shall be removed from the qualified circulation list within 30 days of receipt of the communication.

If reporting Paragraph 3b for source and age, deductible subscriptions are sourced as request circulation; non-deductible are sourced as Membership Benefit circulation.

An annual membership communication (e.g., dues invoice, membership packet, promotional letter) shall clearly state the amount of dues allocated for payment of the subscription, and whether the subscription amount is deductible or non-deductible. If the magazine is to be sent in digital format, the communication must also include this disclosure.

1-2 221 Membership Benefit Subscriptions – Disclosure Standards

Publications electing to report qualified non-paid and qualified paid circulation separately in paragraphs 2 through 4 and reporting membership benefit circulation in paragraphs 1 and 3a of the brand report shall report an analysis of that circulation in the explanatory paragraph, Additional Data as follows:

When applicable, shall state, "..... is the official publication of “

In addition, the following shall be stated:

Qualified paid Membership Benefit subscriptions averaging copies were sold to qualified recipients at the following subscription prices:

Members yearly subscription price is included in the dues and is ... (deductible/non-deductible) ... therefrom."

The media owner may add explanatory information to these notes to better define the membership organization.

1-2 222 Non-Deductible Subscriptions

Individual subscription paid for as part of a reservation fee for conferences, meetings, seminars, etc., where the recipient does not have the option of deducting the subscription price and automatically receives the publication. The offer shall clearly state the amount of money allocated for payment of the subscription.

Such offers shall qualify as paid circulation and shall be reported as “Communication” (other than request) in paragraph 3b (when reported) of the brand report and shall have a footnote reading "See explanatory paragraph, Additional Data." The explanatory paragraph, Additional Data shall include a comment describing the offer and the number of copies so reported.

1-2 223 Post Expiration Copies Included in Paid Circulation Up To Three Months - See: Arrears, Section 1-2 210.

1-2 224 Promotional Incentive

Any inducement offered to a subscriber for free with their own subscription.

When subscriptions are sold with promotional incentive, the value of the incentive cannot exceed 50% of the total offer price of the subscription(s).

The value of the promotional incentive is considered to be the actual cost to the media owner plus 25% or the recognized retail value or the represented value, whichever is highest.

If a back copy is included in a subscription offer, it will be considered a promotional incentive unless the subscription is put on a retroactive basis.

Details regarding offers with promotional incentives (for both qualified paid and non-paid circulation) shall be reported in the explanatory paragraph, Additional Data of the brand report identifying the premium and quantity used for the analyzed issue.

For single copy sales, a promotional incentive is any inducement offered by the last agent in the chain of distribution (point-of-purchase). Any inducement attached to, or polybagged with, a single copy at the point-of-purchase is considered a promotional incentive.

The promotion, on the cover of a publication, of an advertiser's coupon within the publication is not considered a promotional incentive.

When single copies are sold with a promotional incentive, the value of the incentive cannot exceed 50% of the cover price. The value of the promotional incentive is considered to be the actual cost to the media owner plus 25% or the recognized retail value or the recognized retail value or represented value, whichever is highest.

Single copies sold in Europe with a promotional incentive (cover mount), shall report copies sold as "qualified paid," regardless of the value of the promotional incentive offered.

Single copies and subscriptions sold in the Middle East with a promotional incentive shall report the subscription as "qualified paid," regardless of the value of the promotional incentive.

Details regarding promotional incentive offers, and the number of single copy sales sold to consumers with a promotional incentive shall be reported in the explanatory paragraph, Additional Data of the brand report (See 1-2 227).

Free promotional incentives, the contents of which have been published, either in print or digital medium, are reported as "sold with editorial promotional incentive (including reprints)."

Editorial promotional incentives include:

- Reprints of publication Sections,
- Books,
- Other printed reference matter (paid annual periodicals excluded)
- Pamphlets,
- Disks containing items such as compilations of publication editorials, software demonstrations, clip art, fonts, etc.

For additional standards regarding services or products sold in combination with a publication, see standards regarding Combination Sales (See 1-2 213).

1-2 225 Renewal

A subscription which has been renewed within six months of its expiration date and paid for within six months following receipt of the renewal order.

1-2 226 Renewal Rate

The number and percentage of expiring subscriptions which have been renewed within six months of their expiration date and paid for within six months following receipt of the renewal order (See 1-2 413).

1-2 227 Single Copy Sales

Those copies of a publication sold through newsstands and other retail outlets and reported throughout a BPA Worldwide brand report or audit report. These sales shall be reported separately in paragraphs 1, 3a, 3b, 4, and 3c, when reported. (See 1-2 407).

All single copy sale prices for the period shall be reported in the explanatory paragraph, Additional Data.

Any unsold or returned copies intended for single copy sales shall not be included in Average Non-Qualified Circulation. Unsold or returned copies are not included in BPA reports.

Magazine members reporting single copy sales in China must include the following footnote on all brand reports and audit reports if single copy sales copies equal 10% or more of average total qualified circulation for the period:

BPA Worldwide has verified the number of copies printed, the number of copies shipped to the first point of the distribution channel, and that copies were paid for by the distributor at the first point of the sale chain. The actual number of copies sold by the retailer to the end consumer cannot be verified, due to the current retail system.

Publications reporting Single Copy Sales in paragraph 1 and including Single Copy Sales Multi-Copy and/or Non-Returnable in that figure, shall report Single Copy Sales Single, Multi-Copy and Non-Returnable Sales on an issue-by-issue basis in the explanatory paragraph, Additional Data.

At the option of the media owner a breakout of Single Copy Sales by type of outlet, (for example, newsstand, retail store, etc.) and/or by U.S. and international circulation can be provided and reported in the explanatory paragraph, Additional Data.

Publications reporting Single Copy Sales in paragraph 1 and including Non-Returnables in that figure shall note the formula used to determine net sales in the explanatory paragraph, Additional Data.

Publications reporting any Single Copy Sales sold with a promotional incentive shall show an issue-by-issue analysis of the number of single copies sold with a promotional incentive. The nature of the premium and provisions of the offer shall be described in the explanatory paragraph, Additional Data (See 1-2 224).

1-2 228 Single Copy Sales - Final Settlement Date

The date by which single copy sales accounts for an issue shall be closed after which copies may no longer be counted as paid.

The "final settlement" date may be no longer than twelve months from the on-sale date of the subsequent issue for domestic sales and eighteen months from the on-sale date of the subsequent issue for international single copy sales.

If returns are received following the final settlement date, they shall be reported as unsold copies.

Example of final settlement dates for domestic circulation of various frequencies are as follows:

Weekly: The first issue in January has a final settlement date of up to the second week in January of the following year, which is twelve months from the on-sale date of the second issue in January.

Monthly: The January issue of a monthly publication with an on-sale date of the week prior to issue date has a final settlement date of up to the last week in January of the following year, which is twelve months from the on-sale date of the February issue.

Bi-monthly: The January/February issue which goes on sale for the last week of the first month has a final settlement date of up to the last week in March of the following year, which is twelve months from the on-sale date of the March/April issue.

Quarterly: The Winter issue (January-March) of a quarterly publication issued on the 1st of each quarter but placed on sale two weeks prior (mid-December), has a final settlement date of up to the third week of the following March, which is twelve months from the on-sale date of the Spring issue.

Semi-Annual: The Winter/Spring issue which goes on sale January 1 has a final settlement date of up to July of the following year which is twelve months from the on-sale date of the Summer/Fall issue.

Annual: The current edition of an annual publication issued on the 1st of each year but placed on sale six weeks prior (mid-November), has a final settlement date of up to the third week in May of the year following the subsequent edition, which is six months from the on-sale date of that subsequent issue.

1-2 229 Single Copy Sales - Non-Returnable

Copies provided to wholesalers/retailers for resale for which returns will not be accepted, shall be reported as qualified Non-Returnable Single Copy Sales identified and shown on an issue-by-issue basis in the explanatory paragraph, Additional Data.

Single Copy Sales shall conform to the following conditions:

Copies shall be paid for by the last agent in the chain of distribution (point-of-purchase) at any price and payment shall be remitted to the media owner by the final settlement date.

Single Copy Sales - Non-returnable: The media owner shall provide signed affidavits from the last agent of sale, supporting the number of copies sold to consumers.

If a media owner does not wish to collect non-returnable single copy sale affidavits they may use the following formula:

The total possible sale (draw) shall be reduced by a prorated amount calculated on the basis of whatever discounted price is actually remitted by the agent at point-of-purchase. The total amount paid to the media owner from the vendor shall be divided by the cover price to yield copies "sold".

For example, a media owner allows a 50% discount off cover price for vendors on a non-returnable system. If the vendor draws 100 copies at 50% of the \$2.00 cover price, \$100.00 would be paid to the media owner. Dividing this by the \$2.00 cover price yields 50 copies that may be claimed as "single copy sales".

No promotional incentive or other inducement may be offered which has a recognized retail value or represented value, or cost to the media owner, of more than 50% of the publication's suggested retail cover price.

1-2 230 Single Copy Sales - Multi-Copy

Copies of an issue purchased in quantities of two or more which promote the interest of the purchaser and otherwise conform to the definition of paid circulation shall be reported as Single Copy Sales and shown on an issue-by-issue basis in the explanatory paragraph, Additional Data.

Money collected by an agent need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber/consumer.

1-2 231 Sponsored Individually Addressed Circulation

Individually addressed subscriptions which promote the interests of the sponsor/donor and which otherwise conform to the definition of qualified paid circulation shall be reported as "Sponsored Individually Addressed" circulation.

Sponsored Individually Addressed barter circulation shall be reported separately in paragraph 1, Average Qualified Circulation Breakout for Period.

If the purchaser has a financial interest in the publication, those copies purchased may not be included in qualified circulation unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the purchaser and not for the benefit of the publication.

Money collected by an agent need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor) (See 1-2 503).

1-2 232 Subscriptions

Contractual agreement by an individual or a firm to purchase one or more copies of a publication for a given period at a price.

1-2 233 Subscription Extensions

Number of subscriptions extended because of subscription price reductions or a reduction in the frequency of issue will be reported in the explanatory paragraph, Additional Data.

When a media owner reduces the base annual price of a publication, subscriptions are extended as follows:

The unexpired portion of the subscription shall be extended in the ratio that the value of such unexpired portion at the old base rate bears to the new base rate.

All calculations shall be made effective from the date of the issue with which the price change has occurred.

When a media owner has reduced the base annual price and has extended the expiration date as specified above, and then, at a later date, has raised the basic annual price the new expiration dates for subscriptions originally extended shall be cut back in the ratio that the newest base price bears to the last base price. All calculations shall be made effective from the date of issue with which the price change has occurred.

When a media owner increases the frequency without a change in subscription rates, the media owner may extend the subscription period ordered by the subscriber. Details regarding subscription extensions shall appear in the explanatory paragraph, Additional Data.

1-2 234 Term of Subscription

Length of time a media owner contracts with a subscriber to send issues of the publication, usually one, two or three years.

1-2 235 Third Party Agents

Subscriptions sold through agencies shall be a recognized business concern. It shall be the media owner's responsibility to provide proof of qualification for such recipients.

Money collected by an agency need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber.

Agents shall not be sponsors of subscriptions or single copies. Having a "doing business as" (DBA) name is not sufficient to establish an agent's DBA operation as a sponsor.

1-2 236 Sweepstakes, Prize Draws or Contests

Any subscription offer in which a prize is offered by lottery shall be considered as sold using a sweep-stakes, prize draw or contest.

Details regarding these offers shall be reported in the explanatory paragraph, Additional Data of the brand report, regardless of whether or not paragraph 3b is reported.

Whenever a sweepstakes, prize draw, or contest is offered to individual recipients as an inducement to obtain qualified paid request circulation, the media owner shall appropriately footnote the number of subscriptions sold through the use of these offers in paragraph 3b and provide an explanation of such offers in the explanatory paragraph, Additional Data as follows:

... recipients reported as request circulation in paragraph 3b were obtained through the use of sweepstakes offers
...

Whenever a sweepstakes, prize draw, or contest is offered to individual recipients as an Inducement to obtain qualified non-paid circulation, these recipients shall be reported as "Other sources."

The media owner shall identify such sweepstakes offers and the quantity reported as other sources in a footnote in explanatory paragraph, Additional Data as follows:

... recipients reported as other sources in paragraph 3b were obtained through the use of sweepstakes offers
....

1-2 237 OTHER GENERAL DEFINITIONS AND REPORTING REQUIREMENTS

1-2 238 Additions and Removals

Additions and removals may be maintained and may be reported at the option of the media owner.

An Addition shall be defined as a new name, either individual, "title only", or "company name only" record appearing on the qualified circulation list for the first time.

A removal shall be counted when an individual, "title only", or "company name only" record is permanently removed from the qualified list.

On labels addressed to individuals, with or without titles, any replacement of one individual's name with another shall constitute a removal and an addition.

A change in an individual's title shall not constitute a removal and an addition.

On labels addressed to a title only, the inclusion of an individual's name with or without a title shall constitute a removal and an addition.

The deletion of an individual's name from a label shall constitute a removal and an addition.

In the case of labels addressed to titles only (no individual's name), the change of, or deletion of a title shall constitute a removal and an addition.

On company-name only addressed labels, the inclusion of an individual's name, or the inclusion of a title, or both, shall constitute a removal and an addition. Labels addressed to a department only, shall be considered the same as a label addressed to a title only, for determining whether or not a removal and an addition are required.

The following individual or company names already appearing on the qualified circulation list shall NOT constitute a removal and an addition when:

Moving from one location to another.

Changing from one qualified classification status to another.

Changing from qualified non-paid to qualified paid circulation status or vice versa.

A digital subscriber receives an issue/issue delivery alert, but does not download the issue.

1-2 239 Back Copies

Any issue of the publication dated prior to the current issue shall be considered a back copy, whether served to a new or requalified/renewed recipient. The "current issue" is defined as the most recent issue (printed and digital) distributed or placed on sale, whichever comes first.

Back copies may be counted as either qualified paid or non-paid circulation only for one issue immediately preceding the issue current at the time the recipient is distributed the back copy for publications other than weeklies, or for two issues for weekly publications.

When the recipient has specifically requested back copies of a publication, such copies may be counted as qualified circulation up to three issues preceding the date of the subscription order for all publications. If a media owner wishes to back-start a controlled publication beyond one issue, the media owner shall separately ask the recipient if he/she wishes to begin the subscription with the back copy, and the recipient shall respond affirmatively.

This question shall be separate from the original "request" to receive the magazine, for example:

*Do you wish to receive XYZ publication? Yes___ No___
If yes, do you wish to begin your subscription with the (back copy) issue?
Yes___ No___*

All subscribers to receive back copies shall have qualification sources dated within the three-year qualification period for the audit of the issue served (See 1-2 205).

Special issues such as directory or buyers' guides are not considered when determining the numbers of back copies sent to qualified recipients.

To illustrate, XYZ monthly publication distribution analysis for the May issue (with a stated date of mailing of the seventh of the previous month):

<u>Issue</u>	<u>1st Copy Placed On-Sale</u>	<u>1st Copy Distributed</u>	<u>Subsequent Distribution Dates</u>
May	April 1	April 7	May 9*, June 11**, July 20**
June	May 11	May 12	NA
July	June 1	June 16	NA

* Late distribution (See Section 1-2 406a).

** Late distribution and ineligible back-copy distribution; back copies of the May issue were distributed after the July issue was placed on sale, and are therefore non-qualified, regardless if copies are for paid or non-paid, new or renewed circulation.

1-2 240 Duplication

The same individual appearing on the qualified circulation list more than once shall be considered duplication. Two or more copies sent to the same company name only at the same address shall be considered duplication. All such copies may be reported as Multi-Copy Same Addressee circulation or the duplicated copies shall be removed from the qualified circulation list. A Multi-Copy Same Addressee Distribution agreement is required for more than two copies sent to a same addressee.

If duplication is 10% or more of the analyzed issue's qualified circulation, this circulation shall be identified separately in paragraph 3a as "Multi-Copy Same Addressee" or eliminated from the total qualified circulation.

If two copies are delivered to the same individual (duplicated copies) and exceeds 25% or more of the average qualified circulation, disclosure in the Definition of Recipient Qualification shall occur describing the nature of the multi copy same addressee circulation (See 1-2 246). The following comment shall be stated:

Also qualified copies are delivered as Multi-Copy Same Addressee within the Definition of Recipient Qualification. These include copies delivered to the same individual appearing on the qualification list more than once.

If 10% or more, but less than 25% of the circulation is of this condition, the comment shall be included under the explanatory paragraph, Additional Data, and may be reported in the Definition of Recipient Qualification.

This notation may contain additional explanations regarding the character and nature of the circulation and any other amplification necessary.

1-2 241 Digital Magazines

1-2 241-1

Digital Magazine – A magazine (either with a companion print version or as a standalone digital product) delivered periodically in a digital format (PC, APP, Mobile, Tablet, etc.) with metered (i.e. linear) navigation that is edited, designed, and contains date-stamped content that includes advertising (but not necessarily the same advertising as might appear in a print version). Though editing, design, and issue identification (i.e. date-stamped content) are significant differences, the primary distinction between a digital magazine and a website is the metering (this can be pagination or any other method of going through the issue from beginning to end).

1-2 241-2

A digital magazine may be dynamically created, have targeted content, or may exist in parallel with pre-existing media.

- a. *Dynamic* – Editorial can be created and/or selected at point of delivery. Each recipient may receive a copy with different content and that content can change at any time.
- b. *Targeted* – Editorial is changed for specifically defined groups and/or platforms before point of delivery. Each group of recipients, whether they are segmented demographically or because of the platform they use to receive the digital product, receive a copy with different content specifically selected for that group. Apart from minor updates, the content cannot change once the issue is made available.
- c. *Replica Plus* – If a print edition exists, “plus” is editorial that is retained from the original edition and is redesigned and/or supplemented. Each issue’s content is primarily taken (but not necessarily replicated in its entirety) from the original edition (whether in print or digital). Apart from minor updates, the content cannot change once the issue is made available.
- d. *Editorial Replica* – If a print edition exists, editorial and design are unchanged from the original print edition. Each issue’s content and design are identical to the original edition. Apart from minor updates, the content cannot change once the issue is made available.

1-2 241-3

Media owners shall disclose in brand reports under a “Statement of Content Platform” the form or combination of forms of digital magazine used per the above definition/description.

1-2 241-4

Media owners may report digital magazines by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

1-2 241-5

Circulation for digital magazines shall be reviewed to ensure that the systems of the media owner and its vendors are in compliance with BPA Worldwide standards and policies before such data may appear on a brand report. 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.

1-2 241-6

In all brand reports, digital magazine’s circulation shall be detailed separately in paragraphs one and two, and may be reported separately throughout the balance of the report.

1-2 241-7

All recipients of digital magazines must receive a digital push alert (email or mobile notification) for each issue. Publishers may provide the subscriber with an opportunity to “opt-out” of receiving an alert notification of availability. If a media owner offers an opt-out to receiving the alert, the media owner shall separately offer an opt-out of receiving the digital magazine. Subscribers who opt-out of receiving the alert but have not opted-out of receiving the digital magazine, need not receive an alert to be reported as qualified distribution. All others must receive an alert for each issue. Publications with a daily frequency do not require a digital alert.

1-2 241-8

If an email alert to a qualified subscriber (paid and non-paid) is undeliverable, and information of such is sent back to the email service provider that sent it, the alert is defined as a “bounce”.

A bounce is classified as either “hard” or “soft.”

- Hard bounces are the failed delivery of email due to a permanent reason, such as a non-existent address.
- Soft bounces are the failed delivery of email due to a temporary issue, such as a full inbox or an unavailable ISP server.

1-2 241-9

The media owner shall remove said subscriber from their circulation file, or ensure that the delivery details are corrected. Hard bounces are to be removed before the next issue alerts are sent or, at the very least, if they are sent an alert for subsequent issues, they may not be counted as qualified circulation. Publishers may continue to send alerts to “soft bounces” as qualified circulation for whatever issues occur within 90 days of having received the first soft bounce. Thereafter, soft bounces may not be counted as qualified copies served.

1-2 241-10

Digital magazines with a daily frequency may provide the subscriber with the option to “opt-in” to receiving an alert of availability. An alert is not required for publications with a daily frequency.

1-2 241-11

Digital non-qualified advertiser and advertiser agency copies may be reported on the BPA Worldwide brand report as non-qualified.

1-2 241-12

Paid digital copies and non-paid digital copies to individuals who meet the qualification criteria stated in the Field Served and Definition of Recipient Qualification may be reported on the BPA Worldwide brand reports. Recipients who have not requested to receive the digital publication must be provided the opportunity to opt out of receiving the digital publication.

1-2 241-13

Media owners may convert requested print edition subscriptions to digital magazine subscriptions, provided the subscriber who requested the publication 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.

1-2 241-14

Only one copy of a digital magazine may be considered qualified per single addressee. Digital magazine site licenses may be reported as a media channel on the Brand Report (See 1-1 208).

1-2 241-15

Digital subscriptions purchased through tablets/mobile shall be reported from copy one and for the full term of subscription.

Paid combination sales and bundled subscriptions (print and digital): the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report digital copies.

Paid sponsored digital tablet/mobile subscriptions: the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report the digital copies.

Paid circulation with digital as a promotional incentive: the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report the digital copies.

Non-Paid circulation: recipient must authenticate (access code tied to subscriber registration/information) the digital subscription through the mobile device and access the magazine/publication once each six month reporting period.

Publication members reporting print and digital copies may report at their option whether subscribers to the digital magazine have automatically received the digital magazine or manually downloaded; retrieved; received; the digital magazine.

If downloaded; retrieved; received; data is reported, such data shall be reported in paragraphs 1, 2, 3a, 3b and 4, and paragraph 3c, if reported.

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 brand report 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.

Members may elect to report the following usage/engagement metrics:

Active Views:

- A) An active view is defined as a single copy of a publication actively opened by a device for viewing.
- B) A minimum of one page of an issue opened/served onto a device.
- C) There must be a distinct action/event by the end user to view. A single action/request which results in both the content being downloaded/made available and the automatic opening of a page of the publication is not considered a distinct action/event. A further distinct action would be required such as opening a second page.
- D) If reported, the active view shall be reported on an issue by issue basis.

Number of Sessions per issue: defined as the aggregate number of times an issue was accessed by all unique browsers (individual devices).

Time Spent in Issue per Individual Device: defined as the time spent, on average, in the issue across all unique browsers (total audience).

Number of Sessions in Issue per Individual Device: defined as the average number of times each unique browser accesses the issue being reported.

Number of Pages Accessed: defined as the total unique pages accessed for each issue by unique browsers.

Copies downloaded or accessed using third party digital subscription services may report such copies as “multi-title digital subscriptions” only for the issues the user downloads or accesses for the reporting period. Only unique issue opens shall be reported. Multiple accesses or downloads of issues are only reported as one circulation unit. Paid subscriptions shall adhere to Standard 1-2 206. Reporting Average Annual Order Price for these subscriptions is optional.

Single Copy, non-paid, digital – copies may be reported as qualified circulation if the recipient downloads or accesses the issue. One copy may be claimed as qualified circulation for each unique user that accesses/downloads an issue, regardless of the number of times the unique user accesses the issue. Registration or authentication is not required. Publishers and their vendors have the responsibility to install and maintain systems that accurately capture individual download/access activity.

1-2 242 Digital Magazines - Site License (See Brand Standard 1-1 208)

Site licenses are defined as a contract or agreement between a media owner member and a company/association to provide multiple individuals access to a digital magazine hosted on the subscribing organization's intranet. The contract/agreement shall require the subscriber/administrator of the site license notify all the individual seats (individuals) of the availability of each issue.

- Site Licenses may only be reported on Brand Reports as a channel of communication (See 1-1 208).
- Reported as a "channel" of communication and not as copies circulated, the media owner may disclose throughout the Brand Report the number of authorized Digital Magazine Site Licenses and Seats (individuals) served as part of the license.
- Digital Magazine Site licenses and Seats shall not be reported as qualified circulation.
- A media owner may disclose the number of digital magazine site licenses and authorized seats, including paid and non-paid data, demographic data, license source and age data, and geographic data, using standard BPA Worldwide tables.
- Reporting the name of the company to which the content has been licensed shall be optional.
- Licenses may be reported for definitive amounts only, "global" or "companywide" license agreements may not be reported.
- Qualified circulation and site license seats may not be summed on the BPA reports.

Paid site licenses shall adhere to Standard 1-2 207, paid circulation.

Non-paid site licenses shall adhere to "Request from Recipient's Company," Standards 1-2 518 to 520.

Late Mailing/Distribution - (See 1-2 406)

1-2 243 Merged Publication

Two or more publications which have merged due to suspended publication shall be identified as such on the front page of two sequential brand reports.

Request circulation, which has been combined as a result of the merger, shall be footnoted in paragraph 3b and identified separately for each publication (See 1-2 402).

For Request from Recipient's Company circulation, see 1-2 518l.

1-2 244 Merging Publications: Non-Paid Circulation

When a media owner merges the non-paid circulation of a publication with more than one other publication, the following shall apply:

The publications shall be homogeneous.

A record shall be available indicating the recipient's election to receive the surviving publication. This election may be done through a negative option questionnaire. If such documents are returned to the media owner, they shall be considered a request to receive the surviving publication.

The original source document establishing request circulation for the defunct publication shall be available.

The merged circulation shall continue to age based on the qualification date of the original source document.

1-2 245 Merging Publications: Paid Circulation (Purchase or Transfer of Subscriptions from List of Suspended Publications)

When a media owner purchases a publication and/or the subscription list of a publication that has ceased publishing and transfers the subscriptions to the media owner's own publication, the following shall apply:

The publications shall be homogeneous.

A record shall be available indicating the subscriber's election to receive the publication which has assumed the responsibility to fill the unexpired term of this suspended subscription. This election may be done through a negative option questionnaire. If such documents are returned to the media owner, they shall be considered a request to receive the surviving publication.

This service shall be started within six months after the last issue of this discontinued publication, or within such further time as may be granted by the CEO of BPA.

The original order and proof of payment of the suspended publication shall be available.

The unexpired portion of the subscription is ascertained by either of the following methods, decided by the CEO of BPA:

By dividing the sum of money due the subscriber at the base annual price of the discontinued publication by the price per copy of the surviving publication, said per copy price to be a pro rata price of the base annual subscription price of that publication.

By counting the number of copies of the discontinued publication still due the subscriber and crediting the subscriber with this number of copies of the surviving publication, regardless of the discontinued publication's basic price relative to the acquiring publication's.

A separate business and/or occupational analysis of transferred subscriptions shall be made in paragraph 3a for one brand report and all details concerning such subscriptions shall be reported in the explanatory paragraph, Additional Data as determined by the CEO of BPA.

The subscriptions cannot be reported as paid circulation beyond the expiration date.

1-2 246 Method of Distribution

A statement reported in the explanatory paragraph, Additional Data pertaining to any publication reporting digital circulation or multi-copy same addressee circulation.

If any of the above types of circulation is equal to 10% or more, but less than 25%, of the average qualified circulation the explanatory paragraph, Additional Data shall contain the following applicable statement(s):

Digital Circulation (See 1-2 241)

If digital version circulation exists, the method of distribution shall be fully disclosed as follows:

All qualified circulation conforms to the field served and definition of recipient qualification, as reported.

Print copies are distributed via postal services or other carriers. Recipients of the digital version are notified via [disclose method: email, RSS, instant message, other] when the version is available.

Multi-Copy Same Addressee (See 1-2 518h)

If Multi-Copy Same Addressee circulation is equal to 10% or more, but less than 25%, of average qualified circulation the following comment shall be included in the Method of Distribution:

Also qualified are copies shipped Multi-Copy Same Addressee to companies within the Field Served. A distribution agreement not more than three years old has been obtained indicating that the recipient of the Multi-Copy Same Addressee copies agrees to accept the publication for redistribution to employees of the recipient's company.

If Multi-Copy Same Addressee circulation is equal to 25% or more of the average qualified distribution, the following comment shall be included in the Definition of Recipient Qualification and Method of Distribution:

Also qualified are copies shipped Multi-Copy Same Addressee to companies within the Field Served. A distribution agreement not more than three years old has been obtained indicating that the recipient of the Multi-Copy Same Addressee copies agrees to accept the publication for redistribution to employees of the recipient's company.

Duplication (See 1-2 240)

If two copies are delivered to the same individual (duplicated copies) and exceeds 25% or more of the average qualified circulation, disclosure in the Definition of Recipient Qualification and Method of Distribution shall occur. The following comment shall be stated:

Also qualified are copies delivered as Multi-Copy Same Addressee. These include copies delivered to the same individual appearing on the qualification list more than once.

If 10% or more, but less than 25% of the circulation is delivered to the same individual (duplicated copies) the appropriate comment from above shall be included under the Method of Distribution, in the additional data section, and may be reported in the Definition of Recipient Qualification.

The publisher may add explanations regarding the character and nature of the distribution, and any other amplification necessary.

1-2 247 Multi-Copy Same Addressee Circulation

Two or more copies of the printed publication (whether or not individually wrapped and addressed) sent to a single addressee. This circulation shall be reported separately in paragraphs 1, and 3a of the brand report.

Only one copy of a digital magazine may be considered qualified circulation per single addressee (See 1-2 241).

Multi-Copy Single Addressee circulation representing three or more copies sent to a single addressee at a company shall be supported by a distribution agreement that is not more than three years old. Agreement may be: written and signed or emailed (with personal identifying question) or recorded telecommunication. The document or recorded communication shall indicate that the recipient agrees to accept the publication in bulk for redistribution to employees of the recipients' company. The document shall include the signatory's printed name in addition to the signature, the personal identifier or recording as appropriate.

If Multi-Copy Same Addressee circulation of more than two copies to the same addressee of a company is 25% or more of the average qualified circulation, disclosure in the Definition of Recipient Qualification shall occur describing the nature of the Multi-Copy Same Addressee circulation (See 1-2 246). The following comment shall be stated:

Also qualified are copies delivered as Multi-Copy Same Addressee to companies within the Field Served. A written distribution agreement not more than three years old has been obtained indicating that the recipient of the Multi-Copy Single Addressee copies agrees to accept the publication for redistribution to employees of the recipient's company.

This notation may contain additional explanations regarding the character and nature of the circulation and any other amplification necessary.

If the number of subscriptions involved in any one Multi-Copy Same Addressee or Sponsored Multi-Copy Same Addressee sale exceeds 5% of the total average paid subscription claim for the period in which the transaction takes place, the subscriptions involved in that sale shall be separately and fully explained (price, term, nature of subscription) in the explanatory paragraph, Additional Data. Reporting of the actual name of the sponsor/purchaser is optional.

In those countries such as the People's Republic of China, Cuba, Vietnam, etc., where it is documented that the normal or required method of distribution is Multi-Copy, Same Addressee Subscription for redistribution through an official government department or designated organization, the media owner shall submit an official written request or communication from the government department specifying the number of copies of the publication for distribution.

Qualified Non-Paid Multi-Copy Same Addressee Circulation - May be reported as "Individual" copies in paragraph 1 of the brand report when the media owner has documentary evidence showing that the copies are redistributed to qualified recipients.

Qualified Paid Multi-Copy Same Addressee Circulation - May be classified as "Sponsored Individually Addressed" subscriptions in paragraph 1 and reported as single copies in paragraph 3a of the brand report only when the media owner has documentary evidence showing that the copies are redistributed to qualified recipients.

If the copies are purchased and the purchaser has a financial interest in the publication, those copies purchased may not be included in qualified circulation unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the purchaser and not for the benefit of the publication.

Money collected from an agent for multi-copy subscriptions to the same addressee need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscribers or sponsor. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor) (See 1-2 503).

Multi-Copy Same Addressee subscriptions cannot be reported as paid circulation after the expiration date.

If paid multi-copy same addressee represents 5% or more of the Average Total Qualified circulation and publications elect to report qualified non-paid and qualified paid circulation separately in paragraphs 2 through 4, the media owner shall report an analysis of that Multi-Copy Same Addressee circulation in the explanatory paragraph, Additional Data as follows:

Qualified paid Multi-Copy Same Addressee subscriptions averaging . . . copies were sold, in quantities of to to qualified recipients at prices fromto

1-2 248 North American Industry Classification System (NAICS)

The North American Industry Classification System (NAICS) was developed under the direction and guidance of the Office of Management and Budget (OMB). NAICS is based on a production-oriented concept, meaning that it groups establishments into industries according to similarity in the processes used to produce goods or services (See 1-2 407).

1-2 249 Statement of Content Platform

The Statement of Content Platform discloses the form or combination of forms of digital magazines/editions included in the qualified circulation. These are defined in the statement according to the appropriate definitions and descriptions that include: Dynamic, Targeted, Replica Plus or Editorial Replica.

Media owners have the option to report digital magazines/editions by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

1-2 250 Supplementary Question

A supplementary question is defined as a question eliciting any data regarding respondents' purchasing authority and/or multiple response categories, or any data which relates to purchasing authority of only a specific portion of the qualified subscriber file.

1-2 251 Non-Qualified Circulation

That circulation which does not conform to the Field Served and Definition of Recipient Qualification. This distribution is reported on the first page of the brand report.

1-2 252 Advertiser and Agency Copies

Includes checking copies and prospective advertising copies and shall be reported as non-qualified distribution on the first page of the brand report and audit report.

1-2 253 Allocated for Trade Shows and Conventions

Non-qualified copies distributed at trade shows, conventions or by the media owner's salespeople to prospects. They may be reported separately, or with "All Other" on the first page of the brand report and audit report.

1-2 300 BRAND REPORT– GENERAL INFORMATION

1-2 301 TYPES OF BRAND REPORTS

Initial Audit Report

May be released for any consecutive three or six-month period. A publication shall transfer to the standard six-month reporting periods with its first brand report following the initial audit and include whatever issues were previously audited during the period reported (See 1-2 305 and 1-2 306).

Interim Brand Report

The brand report covering the circulation for the first six months of the audit year (See 1-2 306).

Analyzed Brand Report

The brand report which covers the circulation of the second six-month half of the audit year (See 1-2 306).

Audit Brand Report

An annual report released by the corporation consolidating the interim and analyzed six months brand reports (See 1-2 306). The audit report attests to the accuracy and validity of the media owner's circulation claims in the brand reports.

1-2 302 Statements and Rights of Corporation

Media owner members shall report their circulation on forms supplied by the Corporation. The filing of the media owner's circulation data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, circulation data and other data, in any form and manner authorized by the Board of Directors.

1-2 303 Typographical Setup

In the interests of uniformity in appearance and typographical setup of the BPA Worldwide Business Publication Brand Report, BPA Worldwide will process all paragraphs which require special typesetting, ruling and extra pages. Where additional costs are incurred in setting up special paragraphs the publication member shall be billed those costs.

1-2 304 Brand Report Processing Fees

Time required to process a brand report or audit report shall be charged for at a uniform flat rate to be set from time to time by the Board of Directors.

1-2 305 Brand Report Filing Period – Applicants

Media Owner Applicant - An applicant shall file a three or six month brand report as the basis for the initial audit for the consecutive three or six month period specified by the CEO of BPA during which qualified circulation has been practiced. Upon completion of the audit, the media owner will be admitted to membership and the report shall be released as an initial audit report to rates and data services and BPA Worldwide members.

1-2 306 Brand Report Filing Period – Member

Media Owner Members - With the exception of publications issued annually and semi-annually, BPA Worldwide Business Publication Audit Members will release two Brand Reports each year for the six months ended June and for the six months ended December, or for six months ending March and six months ending September (Canada only). These two six month reports will be covered by one twelve-month annual audit report.

For Medical Journals, members will release two brand reports each year for the six months ended July and for the six months ended January. Six-month brand reports will be covered by one twelve-month annual Brand Audit Report.

The six-month reports will be checked and released as brand reports upon receipt and completion of processing.

The twelve-month report forms the basis for the annual audit report. The audit will be completed after the auditor's examination of the media owner's records. The audit period covered shall be no more than twelve months subsequent to the previous audit report.

A publication issued annually or semi-annually or has a publishing schedule that publishes one issue in a six month reporting period, shall file one twelve month brand report, which will be checked upon receipt and, at the option of the media owner, printed and released by BPA Worldwide upon completion of processing. It shall be the basis for the twelve-month audit report. The audit will be completed after the auditor's examination of the circulation records.

The audit may be made in the media owner's office and/or wherever the records can be properly checked.

A publication applicant which has chosen a period end with a month other than June or December for its initial audit report, shall transfer to the standard June or December schedule with its first Brand Report following the initial audit report and include whatever previously audited issues are necessary to complete the six month period. Likewise, for Canadian and Medical Journal reporting periods.

1-2 307 Brand Report Filing Dates – Members

Reports as outlined in the preceding sections shall be filed with the Corporation within 15 days after the period which they cover. Publication members reporting 50% or more average qualified paid circulation in paragraph 1 shall be granted a 15 day extension to this date.

No member shall be granted an extension of time to file except with the consent of the CEO of BPA, who shall not grant an extension greater than 30 days for publications reporting less than 50% average qualified paid circulation in paragraph 1 or 45 days for publications reporting 50% or more average qualified paid circulation in paragraph 1 without a showing that the filing delay is a result of extenuating circumstances clearly beyond the publication member's control.

Failure to file a report on or before the due date or the end date of an authorized extension shall result in a suspension of services to the publication member and will subject the publication member to disciplinary action as outlined in Section B9.0 of the Bylaws.

At any time after the end date of an authorized extension, if the required report has not been filed, BPA Worldwide shall post an advisory to the BPA Worldwide website notifying the membership of the publication's failure to file. All costs incurred in creating and posting an advisory, if any, shall be paid for by the subject publication member.

No later than 60 days after the close of each reporting period, the web site, www.bpaww.com, will display the status of production for each report that has not been posted to the web site. For example, status of reports with the period ended June will be posted September 1st. These status reports will only include standard terminology approved by the Board of Directors.

The previous period's report would be moved to "history" at this time.

When a report is received by BPA Worldwide 1 – 14 days after the stated due date and a proof copy created, the media owner shall advise BPA of the acceptance of the proof copy within 10 business days after the proof copy has been issued. Reports received 15+ days after the stated due date shall have 5 business days to accept the proof. However, for media owners filing reports prior to the stated due date and receiving a proof copy before the stated due date, the counting of business days for the acceptance process shall commence with the filing due date and not from the date the proof copy was created. For all others, final approval shall be received within 20 business days of receipt of the first proof. The CEO of BPA shall not grant an extension without a showing that the delay in approving the proof copy is a result of extenuating circumstances clearly beyond the publication member's control.

Failure to advise BPA of the acceptance of the proof copy by this date shall result in suspension of services to the publication member and will subject the publication member to disciplinary action as outlined in Section B9.0 of the Bylaws. BPA Worldwide shall post an advisory on its website, notifying the membership of the publication's failure to approve the proof copy. All costs incurred in creating and posting an advisory to the website, if any, shall be paid for by the subject publication member.

All signatures on reports submitted to the Corporation shall be over the individual's typewritten name and title.

1-2 308 SRDS, CARD, BRAD or Other Advertising Rates/Informational Listing Services

The media owner has the option of submitting the special SRDS or CARD or BRAD or similar form supplied by BPA Worldwide and an additional copy of their six-month brand report. When the report has been processed, typeset and approved for printing by the media owner, the SRDS or CARD and/or BRAD or similar form will be forwarded by BPA Worldwide to Standard Rate and Data Service or Canadian Rates and Data and/or British Rates and Data or similar company for inclusion in its next issue. The additional report which has been approved by BPA Worldwide will be returned to the media owner in advance of their printed copies for their use in preparing promotional material.

1-2 309 Report Purchase Options

Printed copies of brand reports may be purchased by a member of the Corporation at a price established by the Board of Directors.

1-2 310 Subject Matter of Reports

All language and terminology shall be factual and auditable.

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards.

In the event of a disagreement with a decision of the CEO of BPA, a media owner member may request a hearing before an appropriate committee of the Board of Directors.

1-2 400 BUSINESS BRAND REPORT– CONTENTS

See Standards in Section 1-2 300 for all general information regarding report types, filing dates, etc.

1-2 401 General Overview

A media owner who wishes to report any variety of audited: publication circulations (with print and digital), web traffic, event attendance, email newsletter distribution, mobile data, webinar attendance, white paper downloads, social media and/or other media channels, shall do so in BPA Worldwide's Brand Report format (See 1-1 201)

For their publications, all media owners are required to report in their brand report, the:

- average qualified non-paid circulation and average qualified paid circulation separately in paragraph 1,
- total qualified circulation in paragraphs 1 through 4, and
- qualified non-paid circulation in paragraph 3b.

The reporting of qualified paid circulation in paragraphs 2, 3a, 3b, 3c, and 4 is optional.

Members have the option of reporting their qualified non-paid and qualified paid circulation separately in paragraphs 2 through 4.

Media owners shall report the average annual order price for the period in the explanatory paragraph, Additional Data (See 1-2 211).

Within the brand report, a member may not claim, or imply, that BPA Worldwide audits readership or intent to read unless the source of the claim is a readership study which has been audited by BPA.

1-2 402 Name of Publication

The first page of the report shall contain the name of the publication; publishing company; principal telephone number; fax number; email address; Web site URL; address of publishing company; whether or not an official association publication; year of publication's establishment and number of issues per year.

A media owner member shall notify BPA Worldwide of any change in the name of their publication. At this time the media owner shall declare whether or not they wish to change the date the publication was established.

Any change in the date of establishment should be consistent with the volume number appearing in the masthead of the publication. If the date of establishment and volume numbers are changed, the publication will be considered a new publication and subject to the standards requiring application for membership.

Whenever two or more publications are merged into one publication, or when one publication is merged with more than one publication, the following comment shall appear in the upper right hand corner of two consecutive brand reports and one audit report of the surviving publication(s):

"Merged Publication – See explanatory paragraph, Additional Data."

The explanatory paragraph, Additional Data shall report the date of merger and other applicable information (See 1-2 243).

1-2 403 Field Served and Definition of Qualified Recipients

Shall contain a factual statement by the media owner describing in auditable terms the standards or qualifications employed by the media owner in determining who will receive the publication. This shall be done by type of businesses or industries served in the Field Served and by job title or job function in the Definition of Recipient Qualification. Paid subscribers and single copy sales may be standards to establish qualification.

If paid circulation without demographics is reported as qualified circulation throughout the BPA Worldwide brand report, this shall be disclosed in the Definition of Recipient Qualification.

Whatever the qualification standards may be, they shall be reported in classification breakouts in paragraph 3a of the brand report. Only recipients who conform to these standards shall be included in the qualified circulation.

See 1-2 246 for disclosure standards for reporting multi-copy same addressee and/or duplication in the file.

A regional publication shall include a description of the geographical area in the Field Served, if this information is not apparent in the title of the publication.

Field Served and Definition of Recipient Qualification may NOT contain any reference to:

Requests to receive the publication.

Recipient's reading or intent to read the publication, unless supported by auditable documentary evidence.

Recipient's buying authority or influence, unless supported by auditable documentary evidence.

Any claim that all people of a certain category receive the publication.

Function, unless supported by auditable documentary evidence.

A classification which is not reported in paragraph 3a of the report.

1-2 404 Average Non-Qualified Circulation

Shall report the distribution of print and digital copies for the period covered in the following categories:

Other Paid Circulation
Advertiser and Agency
Allocated for Shows and Conventions
All Other

Any unsold or returned copies intended for single copy sales shall not be included in Average Non-Qualified Circulation. Unsold or returned copies are not included in BPA reports.

1-2 405 Paragraph 1: Average Qualified Circulation Breakout for Period

All copies listed in the main section of Paragraph 1 fall in the Field Served and are directed to recipients qualified under the provisions of the Definition of Recipient Qualification. This Paragraph will report:

- Individual,
- Sponsored Individually Addressed,
- Membership Benefit,
- Multi-Copy Same Addressee,
- Single Copy Sales,
- and Total Qualified Circulation.

Separate columns will list Qualified Non-Paid, Qualified Paid, and Total Qualified Circulation.

For publications reporting digital versions, at the media owner's option separate Paragraph 1's may be included for individuals subscribing to the print version, individuals subscribing to the digital version, and, if applicable, individuals receiving both the print and digital versions, in the explanatory paragraph, Additional Data.

Total Qualified circulation shall be the unduplicated count, and shall be reported on page one (See 1-2 241).

1-2 406 Paragraph 2: Qualified Circulation by Issues for Period

Shall report the total qualified circulation for each issue.

Shall report gross print and gross digital circulation separately, along with the total qualified circulation consisting of unduplicated unique recipients for each issue.

Total copies distributed (print and digital) must be equal to, or exceed the sum of total qualified circulation, advertiser/agency circulation, non-qualified paid/request circulation for each issue.

Additions and removals for each issue may be maintained and may be reported at the option of the media owner.

Late Mailing/Distribution

If 15% or more of the total copies distributed (print and digital) for an issue reported in Paragraph 2 are distributed on or after the stated distribution date or placed on sale date, whichever comes first, of the next issue, the completion date of distribution for that issue shall be reported in the explanatory paragraph, Additional Data (See 1-2 239).

In the absence of a stated distribution date for a publication on either its rate card, or in industry rates and data sources, the cover date shall be used to determine if copies of the publication are mailed late, i.e.:

<i>Monthlies</i>	Copies would be late if distributed on or after the first day of the next issue (a January issue would be late if mailed on or after February 1st).
<i>Bimonthly</i>	Copies would be late if distributed on or after the first day of the next issue (a January/ February issue would be late if mailed on or after March 1st).
<i>Semi-Monthly</i>	Copies would be late if distributed on or after the first day of the next issue (a January 1st issue would be late if mailed on or after January 15th).
<i>Weeklies</i>	Copies would be late if distributed on or after the first day of the next issue (a January 1st issue would be late if mailed on or after January 8th).

The explanatory paragraph, Additional Data shall report the percentage and number of copies which are distributed late.

When publications report separate editions in Paragraph 2, this standard shall be applied separately to each edition.

If the publication serves special issues (See 1-2 102), the special issue reported in Paragraph 2 shall mail before the stated mailing date of the next regular issue. In the absence of a stated date of mailing, the special issue shall mail prior to the actual mailing date of the next regular issue.

1-2 407 Paragraph 3a: Business/Occupational Breakout of Qualified Circulation

The analysis shall be of any issue reported in the period, as selected by the media owner.

The issue analyzed shall be compared separately with the average of the other issues reported in the report to reveal how typical the issue is, as compared with all the others.

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.

Only classifications included in the Field Served and Definition of Recipient Qualification may be included in the qualified circulation breakout except to show that a "classification" is not served and therefore void of circulation. Publications serving essentially the same field should endeavor to agree upon a mutually acceptable and reasonably uniform schedule of classifications to be employed in paragraph 3a. However, no media owner member shall be required, as a condition of membership, to accept a particular method of schedule of classifications employed by other publications for the same field.

“Others allied to the field” and “other titled and non-titled recipients” shall be reported separately when reported in a table with other demographic categories. However, when reporting demographic categories as a paragraphical expression and not in a demographic breakout table, “others” does not need to be broken out separately from the paragraphical expression.

A newly admitted media owner member may elect to defer reporting “Others allied to the field” and “other titled and non-titled recipients” separately until the second audit. If elected, the following comment shall appear in the explanatory paragraph: “Paragraph 3a: Since this is an initial audit report, figures for ‘Others Allied to the field’ and ‘other titled and non-titled recipients’ are not required. They will be reported in the second audit report.”

Business and industry classifications may be listed vertically in the left-hand column of this paragraph if or when reported. Classifications by size, volume, job titles or job functions may be listed in one of the following ways:

- Horizontally in a cross-tabulation breakout.
- Vertically in the left hand column
- Separately.
- As a subdivision of a business or industry classification.

Publication members electing to analyze their circulation by the recipients’ job functions shall obtain approval of the CEO of BPA to ensure that acceptable qualification proof is available for a functional analysis.

Classifications which are reported with subtotals will be arranged in paragraph 3a with the total reported beneath the subtotal in such a way that no confusion can occur about the exact number of copies being reported. The BPA Worldwide staff shall arrange this breakout in accordance with this instruction.

A publication member may elect to cross-tabulate paragraph 3a by any paragraph reported on the BPA Worldwide brand report providing the data reported for such paragraphs are based on actual counts of the analyzed issue.

Publication members reporting print and digital versions shall report such circulation in the following columns:

- Total Qualified Circulation
- % of Total Qualified Circulation
- Print Version (optional)
- Digital Version (optional)

The classifications for such subscribers shall be based upon the most recent qualification source for each piece of demographic information used to qualify subscribers of the print and digital versions.

If the media owner elects to report print and digital versions, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

Single Copy Sales shall be reported separately and further broken down into:

- Single.
- Multi-Copy Same Addressee.
- Non-Returnable.
- Digital Magazines

An analysis of single copy sales by type of outlet, such as newsstand or retail outlets, may be provided at the media owner’s option. If this option is exercised, the same analysis on an issue-by-issue basis shall be provided in the explanatory paragraph, Additional Data (See 1-2 227).

The quantity of Single Copy Sales sold with a promotional incentive at the point-of-purchase to the purchaser (end recipient) shall be reported in the explanatory paragraph, Additional Data (See 1-2 224 and 1-2 227).

If Multi-Copy Same Addressee circulation, including duplication, is 10% or more of the analyzed issue's qualified circulation, this circulation shall be identified separately in paragraph 3a as "Multi-Copy Same Addressee" or eliminated from the total qualified circulation. (See 1-2 240).

Publication members electing to analyze their circulation by North American Industrial Classification System (NAICS) shall abide by the following special standards:

Only wording appearing in the current NAICS government manuals and reports may be used.

Media owner members reporting under NAICS shall disclose which NAICS government manual was used to collect/report NAICS data. Copies of the NAICS manuals may be obtained online from the US Census Bureau at <https://www.census.gov/eos/www/naics/>.

All qualified circulation shall be classified as defined by NAICS manuals on the basis of the processes used to produce goods or services.

All qualified recipients in each establishment shall be uniformly classified in accordance with the NAICS for the establishment. The method used in the uniform assignment of NAICS data shall be approved by the CEO of BPA.

Central administrative offices and auxiliary units shall be assigned the NAICS classification of the primary business activity.

1-2 408A Paragraph 3b: Qualification Source and Age Breakout

Shall contain an analysis (count and percentage) of the qualified non-paid (and at the option of the media owner may contain an analysis of all qualified paid circulation) circulation by source.

Media owners have the option to report age of source of the non-paid circulation in one, two, and three-year columns. **However, effective February 2022, if this option is not 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, at the option of the media owner, paid circulation is reported by age and subscriptions sold for greater than three years have aged beyond three years that circulation may be reported in the "three years" column with the change to "three+ years" as the column heading. Only paid circulation may be qualified for a period greater than 3 years.

Paid subscriptions older than 3 years may not report demographic information in paragraph 3a, Business/Occupational analysis unless the demographic information is current within three years of the analyzed issue. All paid subscriptions without demographics, or with demographics, but older than three years, shall be reported as "other paid circulation" in paragraph 3a.

A note shall be included in the explanatory paragraph, Additional Data, stating the number of paid circulation aged beyond three years.

Non-paid circulation may not be aged beyond three years.

The issue analyzed shall be the same one as analyzed in paragraphs 3a, 3c (if reported) and 4, except for the interim brand report where the qualification figures for circulation may be obtained by repeating the percentages for circulation from the latest audit report.

In reporting qualification, figures submitted by the media owner covering the number of recipients qualified from each source shall be determined by an actual count of the entire list for the issue analyzed. This count may be obtained from either a master file or from the entire qualified mailing list.

For those media owners exercising their option to report source by age, but not to report qualified paid circulation by source using one, two, and three-year columns, the following footnote in the explanatory paragraph, Additional Data shall be included:

Paragraph 3b includes (number) qualified non-paid circulation. Qualified paid circulation of (number) combined with the qualified non-paid circulation equals (sum of numbers) total qualified circulation for the analyzed issue.

Whenever qualified paid circulation is deleted, the heading for paragraph 3b shall indicate that only qualified non-paid circulation is reported.

A newly admitted media owner member may elect to defer reporting the number of recipients qualified from each source until the second audit. If elected, paragraph 3b of the initial audit report shall contain a statement describing the source of names on the qualified list and provisions made for keeping the list current. The number of names obtained from each source shall not be reported. This statement shall be preceded by the following:

Since this is an initial audit report, figures for this paragraph are not required. In lieu thereof, the media owner makes the following statement concerning the source of names on the qualified circulation list.

The initial reporting of qualified circulation figures for paragraph 3b shall be in an audit report. A media owner has the option of issuing a revised brand report incorporating the audited qualification source data; however, the revised report shall be released simultaneously with or after the audit report. Thereafter, new figures for paragraph 3b are required at least annually, concurrent with the end of the publication's audit year.

The new data for paragraph 3b shall appear in the second brand report and in the twelve-month audit report.

On the interim brand report, qualification figures for paragraph 3b for circulation 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 report 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 audit report. If the total qualified circulation for the issue analyzed in the interim brand report has increased by 10% or more due to a merger of publications during the reporting period, the media owner may elect to report actual figures for the interim brand report or omit the paragraph for the interim brand report.

If the media owner chooses to omit the paragraph the following footnote is required:

Due to a merging of publications during the reporting period paragraph 3b cannot be projected and has not been reported. Paragraph 3b will be reported in the subsequent brand report.

If a publication conducts a special six-month audit to change the audit year-end period (cycle), subsequent interim circulation data may only be projected from the printed/posted audit report.

A media owner may report new figures in paragraph 3b in the interim brand report if new figures are obtained from a label printout count which shall be subject to audit.

Publication members reporting print and digital versions shall report such circulation in the following columns:

Total Qualified Circulation
% of Total Qualified Circulation
Print Version (optional)
Digital Version (optional)

If the media owner elects to report print and digital versions, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

If non-requested digital circulation is reported, print and digital circulation shall be reported separately throughout the paragraph.

Detailed coding information for each source classification shall be maintained for all qualified circulation.

The following schedule of sources of qualification shall be listed in Paragraph 3b:

- I. Direct Request
- II. Request From Recipient's Company
- III. Membership Benefit
- IV. Communication (other than request)
- V. Total sources other than above, including: association rosters and directories, business directories, manufacturer's, distributor's and wholesaler's lists, and other sources
- VI. Single Copy Sales

Media owners may report written, telecommunication, and electronic request at their option. Media owners may report expanded breakouts of association rosters and directories, business directories, manufacturer's, distributor's and wholesaler's lists separately, at their option.

The media owner shall insert opposite each source the number of recipients for each source.

The source material shall be identified in a footnote in the explanatory paragraph, Additional Data whenever 10% or more of the circulation is qualified through any one of the following:

- A single business directory;
- A single online business directory source;
- A single association roster or directory;
- A single "other source"

Disclosure of the identity of Manufacturer, Distributor, Wholesaler lists shall be optional.

Whenever 5% or more of the total circulation is qualified through any combination of Association Rosters or Directories, Business Directories, Manufacturer, Distributor and Wholesaler lists, or Other Sources, the number of sources used and the amount of circulation from those sources shall be disclosed in the explanatory paragraph, Additional Data as follows:

Association Rosters and Directories include (number) sources of circulation for quantities of (lowest number) copies or (lowest) % to (highest number) copies or (highest) %.

This note is to be included for each type of source used.

Publication members may elect to report a breakout of their qualified United States and international circulation by source and qualification time period in paragraph 3b.

1-2 408B Paragraph 3b, Optional Addendum: Recency of Engagement

An optional table, which if reported, shall follow Paragraph 3b, "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, to be reported using 1 and 2 year columns.

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, and 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
TOTAL QUALIFIED CIRCULATION	72,091	28,472	-	95,920	4,643	100,563	100.0
PERCENT	71.7	28.3	-	95.4	4.6	100.0	

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.

The aging of the engagement shall be determined by the most recent date an individual engaged with the brand including purchases, opened email newsletter, visited websites, requested media, registered for or attended an event or webinar, or communicated with the media brand in some other way, etc.

For documentation purposes, the following is required for each form of engagement:

Purchase - Dated record of a purchase by the qualified subscriber of any product or service sold by the publication Brand.

Email Newsletter - Dated record of the activation of a tracking pixel by the qualified subscriber indicating an email newsletter published by the Brand has been opened or displayed in a viewing pane.

Website - Dated record of an access by the qualified subscriber to a website of the publication Brand.

Only website visits to the site of the publication shall be considered an engagement for the publication brand. One website may serve as the designated site for multiple publications provided the site destination is promoted as each publication's website. For example, assume three publications, Magazine One, Magazine Two, and Magazine Three. All three are served by the website, "NUMBERS.COM". Visits by recipient of Magazine One to NUMBERS.COM may count the visit as an engagement for Magazine One. Likewise, a visit by a recipient of Magazine Two to NUMBERS.COM counts as an engagement for Magazine Two. If a person receives both Magazine One and Magazine Two and visits NUMBERS.COM, that visit is counted as one engagement for both Magazine One and Magazine Two.

The brand of the website for each publication must be disclosed in the footnote to the Recency of Engagement table. For the above example, the footnote for Magazine One, Two or Three would read, "TRANSACTION/INTERACTION HISTORY. The most recent date an individual transacted/interacted with the brand, including purchases, opened email newsletter, visited www.numbers.com, requested the magazine, attended a webinar, attended an event, or communicated with the media brand in some other way".

Visits to a publishing company's corporate website may not count as an engagement for a media brand; only visits to the media brand's designated website qualifies as an engagement for the media brand.

Document Download - Dated record of the qualified subscriber downloading white papers, case studies, marketing collateral, etc., posted by the publication Brand on any web site.

Event or Webinar Registration or Attendance - Dated record of the qualified subscriber registering for, or attending, an event or webinar of the publication Brand.

Other Communication - Dated record of the qualified subscriber otherwise communicating with the publication Brand.

1-2 409 Paragraph 3c: Mailing Address Breakout of Qualified Circulation (Optional)

If reported, shall contain a mailing address analysis (count and percentage). The issue analyzed shall be the same one as analyzed in paragraph 3a, except for the interim brand report where the mailing address figures may be obtained by repeating the percentages from the latest audit report.

A recipient shall be counted in one of the following five categories based on the mailing data appearing on the label:

- Individuals by name and title and/or function
- Individuals by name only
- Titles or functions only
- Company names only
- Multi-copies to Same Addressee
- Single Copy Sales

However, individually addressed recipients without titles may be counted in the category "Individuals by name and title and/or function" provided the title or function is supported by auditable documentary evidence.

All copies directed to "Library" or "Librarian", regardless of name and/or title, shall be reported in "Company names only."

A media owner may substitute the term "Store names only" for "Company names only" whenever necessary or may make other equivalent changes in "Company name only" with the written approval of the CEO of BPA.

At the media owner's option, paid circulation without demographics or not classified for how mailing data appears on the mailing label may be reported as "Other Paid Copies including Single Copy Sales".

The new data for paragraph 3c shall appear in the second brand report and in the 12-month audit report.

On the interim brand report, figures for paragraph 3c may be obtained by repeating the percentages from the latest audit report and applying them to the qualified circulation for the issue analyzed for the interim report to arrive at the total copies in each breakout.

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 audit report. If the total qualified circulation for the issue analyzed in the interim brand report has increased by 10% or more due to a merger of publications during the reporting period, the media owner may elect to report actual figures for the interim brand report or omit the paragraph for the interim brand report. If the media owner chooses to omit the paragraph the following footnote is required:

Due to a merging of publications during the reporting period paragraph 3c cannot be projected and has not been reported. Paragraph 3c will be reported in the subsequent brand report.

A media owner may report new figures in paragraph 3c in the interim brand report from a mailing list which shall be subject to audit.

Publication members reporting qualified circulation for both print and digital magazines may report separate columns for these circulations.

1-2 410 Paragraph 4: Geographical Breakout of Qualified Circulation

The issue analyzed shall be the same one as analyzed in paragraph 3a.

Shall contain an analysis (count and percentage) of the qualified circulation by geographic region. Digital magazine subscribers who do not provide a physical land address shall be reported as “email address only.”

Multi-Copy circulation, if any, shall be included in the appropriate geographic area.

Regions representing 0-4.9% circulation shall report circulation by the geographic areas listed in section “e” of this Standard. Regions with 5.0% - 24.9% circulation shall report circulation by country. Standard country breakouts are available for each region. Countries with 25%+ circulation shall report circulation by state/province or other agreed upon market geographic breakdown within any one country, using standard BPA Worldwide tables (Canada, China, United Arab Emirates, United Kingdom, and the United States, available within-BPA’s on-line filing system website).

Where BPA Worldwide has not published a standard table and a publication has over 25% of its circulation to any one country, and the market would benefit from a standard table, BPA Worldwide will work with the media owners in the market to establish a standard table.

- (a) For regional reporting of circulation in the United States, paragraph 4 will report the following which is consistent with that of the U.S. Bureau of Census:

New England	East South Central
Middle Atlantic	West South Central
East North Central	Mountain
West North Central	Pacific
South Atlantic	

In addition, U.S. Territories, Canada, Mexico, Other International, APO/FPO addressed copies shall be reported.

Media owners may report circulation by state and three digit zip code prefixes or counties, at their option.

- (b) For regional reporting of circulation in Canada, paragraph 4 will report the following:

Newfoundland	Ontario
Prince Edward Island	Manitoba
Nova Scotia	Saskatchewan
New Brunswick	Alberta, N.W.T. and Nunavut
Quebec	B.C. and Yukon

- (c) For circulation in the United Kingdom, it is sufficient to solely report “United Kingdom” in paragraph 4.

Media owners may elect to report circulation in the United Kingdom by region using the following breakout:

Northern	Scotland
Yorkshire & Humberside	Wales
North West	East Anglia
East Midlands	Greater London
West Midlands	South East
Northern Ireland	South West

- (d) For regional reporting of circulation for China, paragraph 4, will report the following which is consistent with the People’s Republic of China Administrative Standard Regions:

Northeast	East China
North China	Central South
Northwest	Southwest
Other	

Publication members reporting more granular than regional circulation within the People's Republic of China must report by province/city using the BPA Worldwide standardized breakout.

(e) International circulation shall be reported using the following regional breakout:

Asia	Caribbean
MENA (Middle East North Africa)	Central America
Europe	South America
Africa	Asia Pacific
North America	

Publication members reporting qualified circulation for digital magazines may report digital, print and total qualified (unique recipients) classification headings. The column representing unique recipients shall be an unduplicated count.

In addition to reporting the standard paragraph 4, publication members have the option of including a map to graphically display their circulation distribution.

1-2 411 Prices and Promotional Incentives Tables: Qualified Paid Subscription Sales for Period (Optional)

If reported, shall report the gross total number and percentages of new and renewed qualified paid subscriptions ordered/sold during the period covered; this includes gross subscription sales/orders with unpaid invoices pending.

(a) Prices

This paragraph shall separately report the gross number of qualified paid subscriptions sold during the period by prices and term in sequence of descending percentage of orders sold except for "All Others" which shall always be reported last. Only offers representing 5% or more of subscription sales for the period shall be disclosed showing the quantity of orders and percent of total orders. If "all others" represents 20% or more of the orders for the period, the average price of "all other" orders shall be reported.

Subscriptions sold on a renew until forbid basis with no fixed term, which are billed periodically throughout the year, without any renewal notification, shall be reported separately as "Perpetual subscribers (see note)." The media owner shall disclose the rate and terms of the perpetual subscriptions.

Subscriptions sold accepting redemption of affinity program points e.g., frequent flyer miles as payment, shall disclose the details of the offer, including the subscription price, redemption value of a point, and points redeemed in the explanatory paragraph, Additional Data and cross-referenced to paragraph 3a (See 1-2 207).

(b) Promotional Incentives Table

This paragraph shall report the number of gross new and renewed qualified paid subscriptions ordered/sold with promotional incentives during the period covered (See 1-2 224). The nature of the promotional incentive and provisions of the offer shall be described in the explanatory paragraph, Additional Data.

The following categories of Promotional Incentives shall be listed in the table:

Sold without promotional incentive.....
Sold with editorial promotional incentive
Sold with other promotional incentives...

1-2 412 Three Calendar Year Analysis (Optional)

If reported, shall report the total audited average qualified circulation for a six month circulation intervals for the previous two years and the current unaudited brand report(s).

The data shall include a reporting of the Total Audited Average Qualified circulation, Qualified Paid circulation, Total Qualified Non-Paid circulation. Qualified Digital Magazines and Qualified Print Publications circulation shall be reported if applicable. The percent of post expiration copies over total qualified circulation for the analyzed issue, and average annualized subscription price (inclusive of premium value) shall also be reported.

Also reported shall be the stated rate base, if any, a comparison between the audited average qualified circulation and the rate base.

1-2 413 Renewal Percentage of Qualified Circulation (Optional)

Media owners may opt to report the renewal rate for the qualified paid circulation in the explanatory paragraph, Additional Data. All publications have the option of reporting information in this paragraph upon the availability of the necessary records to complete the percentage of the renewal formula.

If the renewal percentage is reported, the media owner may report a renewal rate for paid subscribers or state separately the number of qualified paid Individual, Membership Benefit and Multi-Copy Single Addressee subscriptions expiring during the twelve months ended eight months prior to the end of the period covered by the report, the number of these expirations which were renewed, and the renewal percentage.

A subscription shall be considered a renewal if it has been renewed within six months of its expiration date and paid for within six months following receipt of the renewal order.

The initial reporting of the renewal rate shall be in an audit report.

At the option of the media owner, international, APO and FPO addressed circulation may be omitted in calculating and reporting the renewal percentage. If this option is exercised, suitable explanation shall be made in the explanatory paragraph, Additional Data and shall read:

At the media owner's option, the renewal percentage reported excludes international, APO and FPO circulation.

1-2 414 Additional Data / Explanatory Notes and Information

Shall contain any additional explanatory information necessary to supplement facts reported elsewhere in the report.

Only data approved by the CEO of BPA shall be shown in this section.

All required disclosures are delineated within each standard or appropriate section of the standards.

1-2 415 Media Owner's Affidavit

A brand report shall carry the media owner's affidavit containing two signatories. At least one of the two signatories shall be that of an officer of the publishing company or its authorized representative. The names and titles of the persons signing the brand report shall be displayed in the affidavit.

1-2 416 Date Received

All brand reports will contain the date received by BPA Worldwide.

1-2 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-2 501 Records – Proof of Production and Distribution

Media owner members shall provide for the auditor's examination proof of mailing of every issue of the publication for the period being audited. This proof shall be in the form of receipts from the Post Office, or other courier if the Post Office is not used.

These receipts may be in different forms due to postal regulation. Where Multi-Copy Same Addressee, or other international circulation is claimed, suitable proof of its mailing shall be available.

In addition, receipts for monies deposited with the Post Office shall be retained for the auditor's examination.

For Digital Magazines, summary reports of alerts and distribution/downloads shall be provided to the auditor with corresponding logs (See 1-2 241).

A copy of each issue, cancelled checks, printer's bills, and paper consumption reports shall be available. The auditor may request access to any ledger accounts relative to circulation and such inspection shall be made with a representative of the publication present.

1-2 502 Records – Qualified Sources

Proof of classification as reported in paragraph 3a shall be available for all recipients on the qualified circulation mailing list. This proof may be no older than three years from the date of the issue analyzed. If the classification in Paragraph 3a contains data that cannot change – such as year of medical school graduation – the proof may be older than three years from the date of the issue analyzed.

All documents used in verifying the qualified circulation mailing list as of the issue analyzed for each reporting period shall be available to the auditor.

Qualification evidence submitted by the media owner shall support all the data on the mailing label. However, evidence supporting the street address or box number may be omitted whenever the Postal Service notifies the media owner of an address change.

Nothing in these standards shall be construed as requiring a media owner to include the name of a person or any other specific element on the mailing labels, but whatever mailing data is present shall be supported by evidence, subject to the claim that the recipient is within the Field Served, Definition of Qualified Recipient, conforms to the Method of Distribution, and has been correctly classified in Paragraph 3a.

In the event that the address and the qualification of a single recipient is supported by evidence from more than one source, the media owner may choose any one, but not more than one of those sources under which to classify the recipient in reporting in paragraph 3b of the brand report. However, when copies of a publication are directed to specific individuals by name, the media owner shall report the sources from which the recipient's name was obtained.

1-2 503 Records - Paid Subscriptions

Original orders, dues invoices, membership application forms and proof of payment for all qualified paid subscriptions shall be available to the auditor as to price, term, expiration date, and use of promotional incentive, if any.

Media owners shall maintain on file for use of the auditor, copies of all subscription offers, and copies of all contracts made with solicitors, subscription agencies or any other parties through whom subscriptions are obtained for their publications as well as for handlers (national distributors and/or wholesalers and/or retailers) of single-copy sales.

The auditor may request access to any ledger accounts relative to circulation, and such inspection will be made on-site with a representative of the magazine present, if desired.

Publications shall code to denote on computer records and display on a resulting printout, price paid, demographic classification (if any), source and date of qualification, length for each subscription, use of promotional incentive and subscription expiration date.

For publications reporting their qualified paid circulation throughout their brand report, the media owner shall run tabulations separating counts of the qualified paid circulation and qualified non-paid circulation, respectively.

Publications reporting their qualified paid circulation throughout their brand report are required to maintain a daily, weekly, or monthly subscription register (the journal of original entry) or a system in lieu thereof which records the following information concerning each and every subscription received:

- (a) Price paid
- (b) Date of payment
- (c) Length of subscription
- (d) How ordered
- (e) Promotional incentives, if any
- (f) Multi-Copy Same Addressee subscriptions
- (g) Membership Benefit subscriptions.

1-2 504 Requirements for Storing Documents Digitally

Media owners electing to store documents digitally shall adhere to the following:

1. The stored qualification documents shall support the following information for each recipient:
 - a) Business/Occupational classifications for paragraph 3a.
 - b) All other demographic data captured for future use.
 - c) Source and date of qualification documents for paragraph 3b.
 - d) Recency of Engagement if reported.
 - e) Mailing address breakout for paragraph 3c, if reported.
 - f) Geographical breakout for paragraph 4.
2. The date of qualification for paragraph 3b shall be the date the recipient signed the document or the date of receipt stamped by the media owner. It is not necessary that the postmark cancellations be imaged.
3. Completely legible hard copy or digital images shall be provided for the stored qualification documents selected on the auditor's test.

At BPA Worldwide's discretion, periodic confirmations shall be made to verify the origin of the document.

1-2 505 Single Copy Sales

Publications reporting Single Copy Sales in paragraph 1 shall maintain records to substantiate the claim.

A shipping manifest indicating destinations for breakout shipments and shipping receipts for distribution of copies in bulk from the printer to the first point(s) of redistribution, either the distributor, wholesaler/ breakup agent, or outlet dealing directly with the media owner shall be maintained.

Media owners shall maintain accounts specific to each publication title for any national distributor, wholesaler or vendor with whom they conduct single copy sales transactions.

All account entries shall be documented including invoices for the draw, covers or affidavits for returns, and adequate evidence of payments received and credits issued.

1-2 506 Non-Qualified Sources

The following types of records shall NOT be acceptable as evidence of qualification:

1. Official Post Office change of address notification forms shall not constitute acceptable qualification proof unless they also provide proper qualifying information.
2. Any reports originating within the publications own organization or from the media owner staff with the exception of telephone interviews which have been approved by BPA Worldwide (See 1-2 515).

1-2 507 Audit Methodology

The BPA Worldwide audit methodology is based upon a perpetual inventory record by issue of the names on a circulation list. It is a media owner member's responsibility to insure the accurate maintenance of their circulation list and records in accordance with these Standards. The BPA Worldwide audit is designed to verify and authenticate the media owner's circulation claims.

1-2 508 Delayed Audit – Suspension of Service

Services shall be suspended by the CEO of BPA for any publication whose audit takes over 75 days to complete or such further time as granted by the CEO of BPA. The media owner may appeal the CEO's decision in writing to the Executive Committee of the Board of Directors within seven days from receipt of the CEO's decision. The decision of the Executive Committee shall be final. In the event of suspension, a notice shall be posted on BPA's web site and/or released to the membership and the media owner may not publicize any circulation data until the successful completion of that audit.

1-2 509 Circulation List

A printout proof or electronic file of all names on the qualified circulation list for the issue analyzed shall be provided for the auditor for each reporting period. A physical count of the circulation list shall be made by geographical distribution, and by the classifications shown in Paragraph 3a of the brand reports, including the date the demographic data was obtained.

A media owner reporting new qualification figures in Paragraph 3b in their interim brand report shall provide the auditor with a physical count of the mailing list.

All records supporting qualified and non-qualified paid circulation, non-qualified request circulation, and single copy sales as required by the Standards, shall be maintained and shall be available to BPA Worldwide.

1-2 510 Requirements and Records for Computerized Data Files

Media owner members shall:

Provide an electronic file for each reporting period of all qualified names on the qualified mailing list for the issue analyzed, including all of the coding information for each recipient, and a notation for digital and print recipients.

Provide separate computer tabulations for:

additions and removals for each issue, if reported, as defined in Section 1-2 238 of these Standards.

Business/occupational classifications for paragraph 3a.

Source and age of qualification documents for paragraph 3b.

Recency of Engagement, if reported.

Mailing address breakout for paragraph 3c, if reported.

Geographical breakout for paragraph 4.

Post expiration copies (arrears), status of subscription payments if reporting qualified paid circulation separately throughout the brand report.

Retain a "frozen" file (in any form of memory) of the issue analyzed for each reporting period until the annual audit has been completed. The auditor may conduct any tests to verify the accuracy of the above reports.

Allow the auditor to examine the computer procedure manuals, including the coding instructions and system flow charts.

In the interim Brand Report, a media owner may project only circulation data in paragraphs 3b and 3c (if reported) from a printed and posted report (See 1-2 408 and 1-2 409).

1-2 511 Validation of the Circulation File

Upon completion of the circulation audit and affirmation of the mailing list, the media owner with the written approval of the CEO of BPA will be permitted to discard the qualification source documents which have been validated provided the mailing list proof of all the names on the qualified circulation list for the issue analyzed are coded to denote:

Business/occupation and any other classifications for Paragraph 3a (except the existence of units).

The date the demographic data reported in Paragraph 3a and supplementary data was obtained.

Source of qualification and original date of qualification documents for Paragraph 3b.

Source and original date of engagement for the Recency of Engagement paragraph (if reported).

Length and expiration date for each paid subscription.

It shall be the media owner member's responsibility to insure the proper safeguards for the protection and retention of the validated mailing lists, or electronic files thereof, which have been sealed by the auditor for the exclusive use of BPA Worldwide in subsequent audits.

Any qualification source documents received by the media owner after the validated audit issue shall be retained for the auditor's examination at the time of the next regular circulation audit.

A publication member may request a validation audit of its circulation list if the publication's records are to be relocated in another city or state, or if the publication has been sold. Doing so avoids the need to transfer the actual documents; the electronic validated file may be transferred instead.

If the CEO of BPA determines that the validation audit should be made, the media owner shall be billed in accordance with the standard circulation audit charges and any and all other costs which may be incurred by the corporation in conducting such audits.

All records necessary for an audit shall be retained by the media owner until the next annual audit has been completed.

1-2 512 Qualification Sources

Several types of records shall be acceptable as evidence of qualification:

1-2 512A) Request From Recipient's Company

Compliance with Privacy and Data Protection Regulation:

Regarding compliance with any privacy or data protection regulation, BPA members should take note that such regulation supersedes BPA standards. From time to time, BPA may update its standards and provide cautionary advisories as BPA becomes aware.

With respect to the European General Data Protection Regulation (GDPR) it is probable that opt-in activity performed by one person (or company) for another person is acceptable provided the end recipient of the media understands another person may be opting-in for them. In the case of a company person requesting media for employees, such authority would usually be stated in an employee handbook. Regardless, if the employee is advised that someone else has opted-in for them, but that they can opt-out at any time, the publisher will likely be found in compliance.

1-2 513 Direct Request from Recipient

1-2 514 Direct Request: Written

- (a) Written indication from individually qualified recipients requesting the publication may be reported as request circulation.
- (b) For those media owners electing to use a standardized questionnaire to develop request circulation, including those transmitted via fax or scanned image, a question approximating the following shall be asked on the form: "Do you wish to receive (continue to receive) this publication? Yes ... No ..."
- (c) Non-paid questionnaires shall be restricted to a specific time period only if the actual or specific period of time is indicated as part of the question: "Do you wish to receive (continue to receive) this publication for 10 months? Yes ... No...."
- (d) Media owners may utilize, as an option, an alternate question approximating the following: "Please sign here if you wish to receive (continue to receive) this publication." Forms utilizing this alternate must be signed to be reported as personal written request circulation.
- (e) Multiple-publication written request circulation forms or letters are acceptable and may be counted as written request circulation, provided the following requirements are met:

Publications offered shall be homogeneous in that they have similar definitions of recipient qualification and serve businesses, industries, trades, occupations or professions with clearly defined limits.

A separate signature, initial, or selection indicator (media owner's option) from the subscriber is necessary to establish a request for each publication.

The questionnaire form must be signed.

The text of the solicitation shall disclose that multiple publications are being offered.

A description of the editorial content that differentiates the publications offered shall be included on the qualification card. The offer form shall display the different publication logos to increase differentiation among titles. If a publication offered is published in a language different than the language used in the solicitation, this shall be noted on the qualification form.

A question approximating the following shall be asked on the form:

SIGN, INITIAL, OR CHECK HERE IF YOU WISH TO RECEIVE
PUBLICATION XXX

SIGN, INITIAL, OR CHECK HERE IF YOU WISH TO RECEIVE
PUBLICATION YYY

SIGN, INITIAL, OR CHECK HERE IF YOU WISH TO RECEIVE
PUBLICATION ZZZ

Signature

Date

- (f) BPA Worldwide's approval will be given to any questionnaire which is consistent with the Field Served and Definition of Recipient Qualification and the classifications reported in paragraph 3a of the brand report.

Qualification questions may be populated with information obtained through the individual's previous communication with the brand, or third party sources of demographic data, provided the subscriber verifies the data. Recipients must be asked to review the populated data and respond to a separate confirmation question to indicate the populated data is accurate. The request question ("Do you wish to receive/continue to receive XYZ Magazine?") cannot be pre-populated.

- (g) Whenever a questionnaire is used, recipients who indicate they do not wish to receive the publication shall be removed from the qualified circulation list within 90 days of receipt of the communication. However, be advised, this standard is not acceptable under GDPR. Respondents opting-out must be removed within 30 days. This 30-day period can be postponed if the publisher (data controller) informs the respondent of the material issues preventing performance of request, and it must be justified.
- (h) Qualification forms that are entitled or indicated an approximation of "new subscription forms" shall be counted as request circulation. These forms need not contain the question asking the recipient if they wish to receive the publication. Some examples are:
- "Complete this form to start delivery of..."
 - "Start my new subscription now!"
 - "I am a new subscriber!"
 - "I Want the New Format (print/digital combo)"

Kindly submit your approximation to BPA for approval.

Be advised, this standard is not acceptable under GDPR absent of an explicit consent. In addition, the publisher, as data controller, must ensure that the "new subscription forms" directed toward or accessible to European Union residents include an information notice pertaining to the collection of their personal data therewith.

- (i) Reader service cards may be counted as request circulation if the recipient has signed the card and answered the question "Yes, I wish to receive (continue to receive) this publication" (See 1-2 524).
- (j) Voluntary contributions to a publication to offset production and shipping costs may be reported as request circulation if the donation is to defray costs of "continued service of the publication". Any solicitation by the media owner for a contribution to defray costs shall be very clear that the donation is for continued service. Media owners shall offer the option to continue receiving the publication without making a donation, and the option to discontinue receiving the publication.
- (k) An address change may be reported as request circulation for a single publication provided such change has been initiated by the recipient.
- (l) Questionnaires shall contain a provision for the recipient's signature and provision for the date.
- (m) Prior testing of electronic scripts, systems and procedures for soliciting requests may be required to determine auditability.
- (n) The following types of qualified paid circulation shall be considered as written request circulation (provision for signature is not required on paid subscription forms):

Individually paid subscriptions direct to the media owner.

Individually paid subscriptions received through third party agents.

Deductible membership benefit subscriptions.

Subscriptions sold in quantities of two or more paid for by an employer for their employees.

- (o) The qualified recipient's spouse may request the publication on behalf of the qualified recipient. This may be reported as "Direct Request: Written".
- (p) The qualified recipient may request the publication for themselves and up to one other co-worker and have both requests reported as "Direct Request: Written".
- (q) A co-worker may request the publication on behalf of two other qualified co-workers through one questionnaire and the two requests may be reported as "Direct Request: Written" provided the "co-worker" making the request isn't also requesting for themselves (maximum two requests). Requests for multiple (three or more) persons shall be reported as Request from Recipient's Company (See 1-2 518).
- (r) The following types of paid circulation are NOT to be reported as request circulation:

Subscriptions sold in quantities of two or more

Subscriptions ordered by sponsors, donors or gift copies

Non-deductible subscriptions, except in those cases where the media owner has obtained a specific request to receive the publication from the member. However, this does not apply when a non-deductible offer elicits a request to receive a digital version of the magazine.

Multi-Copy Same Addressee

1-2 515 Direct Request: Telecommunication

- (a) Telecommunications from individually qualified recipients requesting the publication may be reported as personal telecommunications request. All outbound Direct Request: Telecommunication requests, with the exception of subscriptions to individuals who refuse to be recorded, must be recorded and made available to the auditor at the time of audit.
- (b) Subscriptions to individuals who refuse to be recorded, inbound telecommunication, and interactive voice response (IVR) requests shall comply with the following conditions:

A question approximating the following shall be asked and answered during the telephone interview: "Do you wish to receive (continue to receive) this publication? Yes ... No ... A personal identifying question must be asked and answered. Some examples..."To permit future verification of your request, please give us your month and/or date of birth - Month ... Day..., or mother's maiden name or high school graduated from." Other forms of personalized questions which only the recipient and not the media owner is likely to know, may be asked as an alternate should the recipient not provide an affirmative response to the original question. Once a particular question is used and the answer stored, a different question shall be used for future request questions. If the respondent refuses to answer any and all personal questions, the interview may be considered a request if the interview is recorded and the respondent indicates affirmative to the request question. The personalized question is not required for faxes, or if the interview is recorded.

If the call is being recorded, the media owner may use any of the following script options to obtain the request:

Option #1

Do you wish to receive this publication?

Do you wish to continue to receive this publication?

Option #2

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription should go to (address). Is that correct?

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription is going to (address). Is that still the correct address?

Option #3

In order to receive your free subscription to (publication name), I just need a few moments to update some information, ok? I have your name as...

In order to continue receiving your free subscription to (publication name), I just need a few moments to verify some information, ok? I have your name as...

Option #4

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we may begin sending you a free subscription to our publication, ok?

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we may continue sending you a free subscription to our publication, ok?

Option #5

Hello. This is (caller's name) from (publication name). I'd like to start your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

Hello. This is (caller's name) from (publication name). I'd like to renew your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

(c) A telephone interview form shall:

Contain adequate instructions (script) to the telephone interviewer (outbound calls) or to the recipient (inbound calls), including a statement, in accordance with local laws, that the call is being recorded;

Contain the name, title, company address and telephone number of the recipient;

Contain an acceptable request question with a personalized data question, coupled to the request for subscribers who refuse to be recorded (as defined in Section 1-2 515b). The personalized data question is required only if the telephone call is not recorded;

Be consistent with the "Field Served" and "Definition of Recipient Qualification"; and

When calls are recorded it is acceptable to confirm name, address, title, email, fax, phone number, and prior-year demographic information during the telephone interview.

- (d) The qualified recipient's spouse may request the publication on behalf of the qualified recipient. This may be reported as "Direct Request: Telecommunication".
- (e) The qualified recipient may request the publication for themselves and up to one other co-worker and have both requests reported as "Direct Request: Telecommunication".
- (f) A co-worker may request the publication on behalf of two other qualified co-workers through one phone call and the two requests may be reported as "Direct Request: Telecommunication" provided the "co-worker" making the request isn't also requesting for themselves (maximum two requests). Requests for multiple (three or more) persons shall be reported as Request from Recipient's Company (See 1-2 519).

Media owners contacting a co-worker to elicit direct request: telecommunication shall comply with the same conditions concerning telecommunication requests set forth in these standards. In addition, the media owner shall obtain the full name and job title of the individual spoken with. If recipient's name and title is not received refer to Standard 1-2 525 Communication (Other than Request): Telecommunication.

- (g) Telecommunication requests for a multiple of different publication brands obtained in a single telecommunication may be counted as telecommunication request circulation, provided the interviews are recorded, a separate request question is asked and answered for each of the publication brands, and such circulation is in conformance with Standards 1-2 514e and 1-2 515j.
- (h) Prior testing of scripts, systems and procedures for soliciting telecommunications requests may be required to determine auditability.
- (i) For incoming requests received through telecommunications, adequate records verifying the time and date of call shall be maintained. In addition to the personalized request question, the recipient may be instructed to provide a unique identification code taken from the media owner's label.
- (j) Media owners shall be responsible for maintaining the following records, which are to be made available to the auditor at the time of audit and/or during random visits:

All telephone company invoices.

All computer-generated data, including summaries by date of calls received, telephone numbers of calls placed and received, and computer logs of tasks performed.

Recordings, where permitted and available, shall be inspected by the auditor to verify adherence to the BPA Worldwide-approved interview form and the proper recording by the interviewer of the recipient's response. Whenever conversations are recorded, the recipient shall be advised, in accordance with local laws, that he/she will be recorded. Monitoring of live interviews also may be conducted for the same purpose.

- (k) The media owner shall be responsible for the documentation and accuracy of telecommunication requests, including those requests obtained through outside telemarketing firms.
- (l) The auditor will compare and cross-check all records and make any other tests deemed necessary, including follow-up telephone contact and/or mail confirmations, for complete and accurate authentication of the request and qualification information. The media owner shall be billed for the extra costs incurred for any special confirmations conducted by BPA Worldwide or its agent, unless included in a current "fixed price agreement".
- (m) All other specific standards pertaining to the use of promotional incentives for personal written request circulation or in the merging of publications' circulation apply to telecommunication requests (See 1-2 224 and 1-2 243).
- (n) For those media owners wishing to use Short Message Service (SMS) to renew previously requested subscriptions, an outline of the program and transcript of the text message shall be submitted to BPA Worldwide for approval prior to use. BPA Worldwide's approval will be given to any renewal SMS program that meets the following conditions:

Media owner must have expressed consent from the subscriber to communicate via SMS.

The outgoing text message contains adequate description of the nature of the request.

The outgoing text message contains adequate request question and instruction to the recipient.

The outgoing text message, or a subsequent text message sent after the recipient renews their request, provides the recipient an opportunity to update their information.

The program captures the outgoing phone number, the phone number of the recipient, the time and date of the outgoing message, the time and date of the recipient's reply, and the recipient's message.

Publications must maintain proof of the initial request.

Documentation of the respondent's conformance to the Field Served and Definition of Recipient Qualification shall be available either through previous request or secondary source and be current within three years of the analyzed issue.

1-2 516 Direct Request: Electronic

- (a) For those media owners wishing to accept requests via electronic medium (Web, email, other) 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 request transcript that meets the following conditions:

Contains adequate instruction (menu and screen panels) to the recipient end user.

Contains a provision for the name, title, and company address of the recipient.

Contains an acceptable request question and a provision for the date.

Outbound solicitations for email requests must include a notification that the subscriber may be contacted by a third party to verify the publication request.

Subscriber access to digital copies may be used to renew a request to continue receiving the digital subscription provided access occurs within the following schedules:

A publication issued 49 issues a year or more must be accessed nine times during the six month period ending with the analyzed issue

A publication issued 37 – 48 issues a year must be accessed seven times during the six month period ending with the analyzed issue

A publication issued 25 – 36 issues a year must be accessed five times during the six month period ending with the analyzed issue

A publication issued 19 – 24 issues a year must be accessed four times during the six month period ending with the analyzed issue

A publication issued 13 – 18 issues a year must be accessed three times during the six month period ending with the analyzed issue

A publication issued 9 – 12 issues a year must be accessed twice during the six month period ending with the analyzed issue

A publication issued 4 – 8 issues a year must be accessed once during the six month period ending with the analyzed issue

A publication issued 1 – 3 issues a year must be accessed once a year

Publications must maintain proof of initial request and subsequent engagement activity for auditor review.

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, qualification questions may be populated with information obtained through the individual's previous communication with the brand, or third party sources of demographic data and provided the subscriber proactively verifies the data by clicking a single "confirm" button at the bottom of the form for the data populated. Recipients must be asked to review the data and press the "confirm" button to agree that all the data is accurate. The request question ("Do you wish to receive/continue to receive XYZ Magazine?") cannot be pre-populated, unless the subscriber has demonstrated through an action ("i.e. click to subscribe") prior to visiting the qualification page.

- (b) Multiple publication electronic requests are acceptable and may be counted as request circulation, provided that the following requirements are met:

Publications offered shall be homogeneous, in that they have similar definitions of recipient qualification and serve businesses, industries, trades, occupations or professions with clearly defined limits.

A separate request from the subscriber is necessary to establish a request for each publication.

The text of the solicitation shall disclose that multiple publications are being offered.

A description of the editorial content that differentiates the publications offered shall be included on the qualification card. The offer form shall display the different publication logos to increase differentiation among titles.

A question approximating the following shall be asked:

Please check here if you wish to receive *Publication XXX*

Please check here if you wish to receive *Publication YYY*

Please check here if you wish to receive *Publication ZZZ*

- (c) The qualified recipient's spouse may request the publication on behalf of the qualified recipient. This may be reported as "Direct Request: Electronic".
- (d) The qualified recipient may request the publication for themselves and up to one other co-worker and have both requests reported as "Direct Request: Electronic" (maximum two requests per form).
- (e) A co-worker may request the publication on behalf of two other qualified co-workers through one questionnaire and the two requests may be reported as "Direct Request: Electronic" provided the "co-worker" making the request isn't also requesting for themselves (maximum two requests). Requests for multiple (three or more) persons shall be reported as Request from Recipient's Company (See 1-2 520).

1-2 517 Request From Recipient's Company

1-2 518 Written

- (a) Questionnaires or letters on a company letterhead from firms, including franchises, requesting copies of a publication for three or more employees identified by name, title and/or function may be reported as written request from recipient's company. For the purposes of clarity please note, if the respondent is requesting for themselves and one other co-worker (or not for themselves but for two co-workers) in one writing, then the respondent subscription and that of the co-worker are to be reported as "Direct Request".
- (b) Media owners electing to use a standardized questionnaire to develop such company request circulation shall comply with the following conditions:

A statement approximating the following shall appear on the form:

Please send this publication to the following employees.

- (c) Such questionnaires or letters shall include instructions to the company to verify each name appearing on the list for correct mailing address information. In addition, the company shall be instructed to fill in or otherwise indicate for each name on the list the recipient's industry, title and/or functional description. Such letters of instruction shall be submitted to BPA Worldwide for approval prior to printing.
- (d) Questionnaires shall contain a provision for signature and a provision for date.
- (e) Each name deleted from the list by the company shall be removed from the qualified circulation within 90 days of receipt of the communication.
- (f) The format and terminology used in standardized questionnaires and requalification forms to develop "written request from recipient's firm" shall be approved by BPA Worldwide prior to use. BPA Worldwide's approval will be given to standardized questionnaires and requalification lists which meet the above conditions and which are consistent with the Field Served and Definition of Recipient Qualification and the classifications reported in paragraph 3a of the brand report.
- (g) The auditor may conduct direct mail confirmations and make any other tests considered essential to the complete and accurate authentication of this source. (See 3-6 104)

- (h) The following types of non-paid circulation may be considered as written request from recipient's firm:

Non-paid request from recipient's firm.

Non-paid multi-copy same addressee circulation.

Multi-Copies to the Same Addressee circulation where the employer at the point of redistribution has agreed to accept a specified number of copies for redistribution to qualified employees. 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.

- (i) The following types of paid subscriptions may be reported as written request from recipient's firm:

Multi-Copy Same Addressee.

- (j) The following types of paid circulation are NOT to be reported as written request from recipient's firm:

Non-deductible subscriptions (except in those cases where the media owner has obtained a specific request to receive the publication from the member).

Gift subscriptions.

- (k) Whenever a promotional incentive is offered as an inducement to obtain either qualified non-paid or qualified paid request circulation from recipient's firm, the media owner shall identify the premium and the quantity used in a footnote in paragraph 3b.

- (l) Whenever two or more publications are merged, request circulation from recipient's firm shall be footnoted in paragraph 3b indicating the percentage of request circulation from each of the merged publications.

- (m) Whenever "company name only" addressed subscriptions are purchased (paid) or requested (non-paid), this circulation shall be reported as "request from recipient's company".

1-2 519 Request from Recipient's Company: Telecommunication

- (a) Telecommunications such as telephone interviews with a co-worker at a company requesting copies of the publication for other co-workers (one person requesting for three or more persons) of that company may be reported as telecommunication request from recipient's company provided the "co-worker" making the request isn't also requesting for themselves. If the latter, the respondent requesting for themselves and one co-worker are to be reported as "Direct Request", and the balance as "Request from Recipient's Company. Such calls may be eligible to be considered as Direct Request: Telecommunication provided they comply with Standards 1-2 515d and 1-2 515f.

- (b) Media owners electing to use telecommunications for company request shall comply with the following conditions:

Outbound solicitations for request from recipient's company: telecommunication must be recorded and made available to the auditor at the time of audit; however, if the recipient refuses to be recorded, a personal identifying question must be asked and answered. Some examples...To permit future verification of your request, please give us your month and/or date of birth - Month ... Day ... or mother's maiden name or high school graduated from." Other forms of personalized questions which only the interviewee and not the media owner is likely to know, may be asked as an alternate should the interviewee not provide an affirmative response to the original question.

Once a particular personal identifying question is used and the answer is stored, a different question shall be used for future request questions.

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

The name and title and/or function of the requestor shall be provided along with the company, address, and telephone of the company.

A question of a co-worker approximating the following shall be stated during the telecommunication: "Do you want this publication sent to any other employees? Yes ... No ...

In the case of a requalification effort the co-worker may be asked, "May we continue to send (name of publication) to (name of qualified subscriber)."

"All I need to do is update the address information and ask a few quick questions and we'll be able to continue (name of qualified subscriber's) subscription for another year, ok?"

Other options:

Option #1

Do you wish to confirm (name of qualified subscriber) should receive this publication?

Do you wish to confirm that (name of qualified subscriber) should continue to receive this publication?

Option #2

All that I need to do is update the address information and ask you a couple of questions to send out a free subscription to (name of qualified subscriber). We show that the subscription should go to (address). Is that correct?

All that I need to do is update the address information and ask you a couple of questions to send out a free subscription to (name of qualified subscriber). We show that the subscription is going to (address). Is that still the correct address?

Option #3

In order for (name of qualified subscriber) to receive a free subscription to (publication name), I just need a few moments to update some information, ok? I have his/her name as...

In order for (name of qualified subscriber) to continue receiving a free subscription to (publication name), I just need a few moments to verify some information, ok? I have his/her name as...

Option #4

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we may begin sending (name of qualified subscriber) a free subscription to our publication, ok?

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we may continue sending (name of qualified subscriber) a free subscription to our publication, ok?

Option #5

Hello. This is (caller's name) from (publication name). I'd like to start a free subscription for (person's name) and just need to ask you a couple of questions to be able to do so. I have the address as (address). Is this correct?

Hello. This is (caller's name) from (publication name). I'd like to renew a free subscription for (name of qualified subscriber) and just need to ask you a couple of questions to be able to do so. I have the address as (address). Is this correct?

- (c) Multi-Copies to the Same Addressee circulation where the employer at the point of redistribution has agreed to accept a specified number of copies for redistribution to qualified employees. The requester must, in a recorded interview, agree to the redistribution. The requester 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.
- (d) All other conditions in sections 1-2 515 and 1-2 525, except in conditions specified for “personal request” telecommunications, shall be followed.

1-2 520 Request from Recipient’s Company: Electronic

- (a) Electronic communications such as email, Internet and other forms, coming either from authorized individuals or from a company, which request copies of the publication for three or more employees of that company, may be reported as “Request from Recipient’s Company: Electronic.” For the purposes of clarity please note, if the respondent is requesting for themselves and one other co-worker (or not for themselves but for two co-workers) in one electronic communication, then the respondent subscription and that of the co-worker are to be reported as “Direct Request”.
- (b) Media owner electing to use this form of company request shall comply with the following conditions:

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

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

The name and title and/or function and email address of the requestor shall be provided, along with the company name, address, and telephone number of the company.

- (c) Multi-Copies to the Same Addressee circulation where the employer at the point of redistribution has agreed to accept a specified number of copies for redistribution to qualified employees. An electronically communicated 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.
- (d) All other conditions pertaining to Internet outlined in Section 1-2 514I shall be followed.
- (e) All other conditions as outlined in Section 1-2 516, except in conditions specified for “direct request,” shall be followed.

1-2 521 Other Than Request

1-2 522 Membership Benefit

Individual and organizational memberships in bona fide associations or societies or clubs etc. where the subscription is paid for out of membership dues and the member does not have the option of deducting the subscription price from the dues (non-deductible membership benefit subscriptions).

1-2 523 Communication (Other than Request)

1-2 524 Written

(a) The following types of records may be reported as Written Communication circulation:

Standardized questionnaires to a media company, such as:

Census forms

Editorial survey forms

Questionnaires that 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 publication, where the recipient has not signed the card and/or answered the question: "Yes, I wish to receive (continue to receive) this publication." 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 media owner and proof of conformance to classification.

Non-deductible association or seminar subscriptions

Expired one- and two-year paid subscriptions

Multi-Copy Same Addressee circulation, where the recipient (not the employer—See Company Request, Section 1-2 518h) at the point of redistribution has agreed to accept a specified number of copies for redistribution to qualified recipients (not employees). 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.

(b) The following standardized questionnaires from another publication shall be reported as Communication from Recipient or Recipient's Company (Other than Request): Written provided the other publication 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 age based on the qualification date of the original source document.

Whenever 5% or more of the total circulation is qualified through questionnaires from another magazine, the number of sources used and the amount of circulation from those sources shall be disclosed in the explanatory paragraph, Additional Data as follows:

Communication from Recipient or Recipient's Company (Other than Request): Written includes [number] sources of circulation for quantities of [lowest number] copies or [lowest] % to [highest number] copies or [highest] %.

The source shall be identified by name in a footnote in the explanatory paragraph, Additional Data whenever 10% or more of the circulation is qualified through questionnaires from a single magazine.

Questionnaires from another publication from another parent publishing company shall not be reported as Communication from Recipient or Recipient's Company (Other than Request): written. These are reported as "Other Sources".

1-2 525 Communication (Other than Request): Telecommunication

- (a) The following telecommunication to a media company shall be reported as Communication from Recipient or Recipient's Company (Other than Request): Telecommunication provided the other publication 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.

Whenever 5% or more of the total circulation is qualified through questionnaires from another magazine, the number of sources used and the amount of circulation from those sources shall be disclosed in the explanatory paragraph, Additional Data as follows:

Communication from Recipient or Recipient's Company (Other than Request): Telecommunication" includes [number] sources of circulation for quantities of [lowest number] copies or [lowest] % to [highest number] copies or [highest] %.

The source shall be identified by name in a footnote in the explanatory paragraph, Additional Data, whenever 10% or more of the circulation is qualified through questionnaires from a single magazine.

- (b) Telephone interview forms shall be submitted to BPA Worldwide for approval.
- (c) BPA Worldwide's approval will be given to any questionnaire which is consistent with the Field Served and Definition of Recipient Qualification, and the classifications reported in paragraph 3a of the brand report.
- (d) 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.
- (e) These forms shall be adequately identified and dated to permit the auditor to satisfy him/herself of their authenticity and acceptability.
- (f) Whenever two or more copies of a publication are sent to the same addressee, where the recipient (not the employer—See Company Request, Section 1-2 519c) at the point of redistribution has agreed to accept a specified number of copies for redistribution to qualified recipients (not employees), the required distribution agreement may be obtained via a telecommunication provided the agreement to distribute the copies is 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 1-2 247).
- (g) The auditor will compare and crosscheck telephone bills, interview forms, conduct confirmations and make any other tests considered essential to a complete and accurate authentication of this source. The media owner shall be billed for the costs incurred for any special tests.
- (h) Telecommunication questionnaires from another publication from another parent publishing company shall not be reported as Communication from Recipient or Recipient's Company (Other than Request): Telecommunication. These are reported as "Other Sources".

1-2 526 Communication (Other Than Request): Electronic

- (a) The following types of records may be reported as “Communication from the Recipient or Recipient’s Company (Other Than Request): Electronic”:

Standardized questionnaires to a media company, such as:

Census forms

Editorial survey forms

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

- (b) 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, title, company 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 auditability.

- (c) BPA Worldwide’s approval will be given to any questionnaire that is consistent with the Field Served and Definition of Recipient Qualification, and the classification reported in Paragraph 3a of the brand report.

- (d) These questionnaires shall be adequately identified and dated to permit the auditor to be satisfied with the authenticity and acceptability.

- (e) Whenever more than two copies of a publication are sent to the same addressee, where the recipient (not the employer—See Company Request, Section 1-2 520e) at the point of redistribution has agreed to accept a specified number of copies for redistribution to qualified recipients (not employees), the required distribution agreement to distribute the copies may be confirmed by the respondent (not necessarily the employer) 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 1-2 247).

- (f) The following standardized questionnaires from another publication shall be reported as “Communication from the Recipient or Recipient’s Company (Other Than Request): Electronic”, provided the other publication is of the same parent publishing company:

Personal Electronic request forms direct from the recipient

Electronic request forms from the recipient’s company

Electronic communication forms from the recipient or the recipient’s company

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

Whenever 5% or more of the total circulation is qualified through questionnaires from another magazine, the number of sources used and the amount of circulation from those sources shall be disclosed in the explanatory paragraph, Additional Data as follows:

Communication from Recipient or Recipient’s Company (Other than Request): Electronic” includes [number] sources of circulation for quantities of [lowest number] copies or [lowest] % to [highest number] copies or [highest] %.

The source shall be identified by name in a footnote in the explanatory paragraph, Additional Data whenever 10% or more of the circulation is qualified through questionnaires from a single magazine.

- (g) Questionnaires from another publication from another parent publishing company shall not be reported as "Communication from Recipient or Recipient's Company (Other than Request): Electronic." These are reported as "Other Sources."

1-2 528 Independent Field Reports

Field reports obtained by independent field service organizations under contract to the media owner shall be adequately identified and dated to permit the auditor to be satisfied of their authenticity and acceptability.

Field service organization reports obtained by interview with the qualified recipients may be counted as request circulation provided the recipient signs the questionnaire requesting the publication.

The CEO of BPA may require the media owner to furnish such information about the organization and its procedures, and may make such independent investigations as deemed necessary to determine whether or not the reports constitute satisfactory evidence of qualification.

1-2 529 List Sources

Association/Society or Club etc. membership lists, (when the publication is not the official journal as a benefit of membership), manufacturers' or distributors' lists of customers, prospects and licensees are acceptable evidence of qualification providing such lists are adequately identified and dated to satisfy the auditor of their authenticity and acceptability.

If the executive director of an Association/Society or Club requests subscriptions for their members, the subscription request may be disclosed in a footnote in the explanatory paragraph, Additional Data.

Whenever manufacturers', distributors' and wholesalers' lists of customers and prospects are used for qualification purposes to support circulation information, the auditor may conduct direct test mailings and make any other tests considered essential to the complete and accurate authentication of this source.

Direct test mailings to verify the recipient's mailing address information, name and/or title and business/occupational data may be required for any portion of the audit sample qualified via list source. The media owner shall be rebilled for the costs incurred for any special test.

1-2 530 Business Directories

All published directories (including directory issues of periodicals and industrial directories) may be made available in print or in some form of electronic record, or online for query through the internet. Each shall be adequately identified and dated to satisfy the auditor of their authenticity and acceptability.

Online directory sources must be an online database source. Any other names obtained through internet look-up searches i.e. on company websites, shall be considered "other sources."

To determine the qualification date of a published directory, the month and year of the copyright or the date of printing (the earliest date) shall be used. In the event that a month does not appear, the following shall apply:

A directory dated on the cover, or electronic source dated for one year only shall have a qualification date of January 1 of that year.

A directory dated on the cover, or electronic source dated for two or more years shall have a qualification date of July 1 of the first year.

A directory dated on the cover, or electronic source dated with a specific month and year would have a corresponding qualification date.

If an online directory has a published date, it will be used to determine the age of that directory. If there is no published date, the age of online business directory sources shall be the date the source was obtained and/or downloaded. No source older than 36 months from the date of the analyzed issue may be used.

Online directory sources must be disclosed in the Additional Data/Explanatory notes section of the Brand report (and identified by name if a single online business directory exceeds 10% or more of the qualified circulation).

1-2 531 - Other Sources

Business letterheads, company personnel rosters, company annual reports, company telephone directories, business cards, trade shows registration lists, reader service cards and qualification questionnaires from other publications not owned by the same parent company. Such sources shall be adequately identified and dated to satisfy the auditor of their authenticity and acceptability.

Qualification questionnaires from another publication from another parent publishing company shall continue to age based on the qualification date of the original source document (See 1-2 524b, 1-2 525h, and 1-2 526g).

Mailing house lists which have been approved by BPA Worldwide may be reported as other sources and shall carry an identifying footnote.

Mailing house lists which have not been approved by BPA Worldwide are not acceptable as qualification evidence. However, in order to obtain BPA Worldwide approval, a media owner may arrange with a mailing house to have the list checked against the original sources provided such sources are within the time limits prescribed in these standards and are available to the auditor. If a media owner elects to report the original qualification sources in paragraph 3b of the brand report, the mailing house shall prepare the data for this paragraph and shall be subject to all requirements for the auditing of paragraph 3b.

1-2 532 QUESTIONNAIRE DESIGN

Whenever a questionnaire is used to elicit information from a recipient, the questionnaire and attendant material shall not improperly lead the recipient to give the desired qualification data in order to receive the publication.

1-2 533 Obtaining Primary Business Information

Whenever a questionnaire is used to elicit specific information about a recipient's business, except the establishments NAICS, a question approximating one of the following shall be asked on the form:

What is your primary business? (Check one only.)

The primary business of my firm at this location is (Check one only.)

Please check the one item which best describes your firm's primary business activity. (Check one only.)

Insert
Letter

☐

Please indicate the primary end product (or service performed at your business by writing the corresponding letter of the alphabet in the box at the left.

Whenever a questionnaire is used to elicit specific information about an establishment's NAICS, a fill-in response question format approximating the following shall be asked on the form:

What is the primary end product manufactured (or service performed) at your business location? (Please be specific)_____

When eliciting information about an establishment's International Standard Industrial Classification (U.N.) a check-off response question format may be used with the above question.

1-2 534 Job Title – Obtaining Job Title Information

Whenever a questionnaire is used to elicit specific information about a recipient's title, a question approximating one of the following shall be asked on the form:

What is your title? (Check one only.)"

What is your title? (Please be specific.)"

1-2 535 Job Function - Obtaining Job Function Information

Whenever a questionnaire is used to elicit specific information about a recipient's job function, a question approximating one of the following shall be asked on the form:

What is your primary job function? (Check one only.)

Please check the one category that best describes your primary job function.
(Check one only.)

Job function (Please rank in order of importance 1, 2, 3, etc.)

Please indicate your primary job function by writing corresponding letter of the alphabet in the box at the left.

Insert
Letter

☐

1-3 CONSUMER MAGAZINE

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1-3 CONSUMER MAGAZINE STANDARDS

1-3 100 ELIGIBILITY – CONSUMER MAGAZINES

1-3 101

A magazine applying for membership shall qualify as stated in Section B2.0 of the Bylaws, and shall conform to the following requirements:

It may be either a general interest consumer magazine or a consumer magazine serving recipients who have a common bond or common interest within clearly defined limits, or a consumer magazine serving its market through targeted channels of distribution.

The magazine shall maintain continuity of style, format, subject or theme from issue to issue.

It shall publish for a minimum period of three months before being eligible for an initial audit, subject to the approval of the CEO of BPA.

It shall be a magazine which includes advertising.

Magazines or printed materials such as, but not limited to, the following are not acceptable for membership in Consumer Magazine Audit of BPA Worldwide:

- calendars
- menus
- card packs
- circulars
- free community shoppers

1-3 102 Extra Issues

When a magazine has extra issues such as directories, catalogs or buyer's guides, the CEO of BPA shall determine whether the magazine is a single qualified magazine or is, in effect, two or more separate magazines requiring separate memberships and separate brand reports and audit reports for each issue on the basis of the following conditions:

The extra issue is distributed to all or a specifically designated portion of the circulation list of the regular magazine.

The extra issue is identified on its cover as a special issue of the primary magazine.

The masthead of each issue reflects the frequency which includes the extra issue.

If, after consideration of the above conditions, the CEO of BPA determines that the magazine is, in effect, a single magazine, the CEO of BPA shall require the magazine to report the extra issue (directories, catalogs or buyer's guides) in paragraph 2 of the brand report and audit report, but not in paragraph 1 if the extra issue is distributed to less than the identical circulation list as that of the regular magazine and a suitable explanation shall be made in the explanatory paragraph, Additional Data subject to audit.

1-3 103 Separate Editions

When a magazine has separate Editions either print or digital, such as demographic or geographic, the CEO of BPA shall determine whether the magazine is a single, qualified magazine or is, in effect, two or more separate magazines requiring separate memberships, brand reports and audit reports. To qualify as a single magazine, the separate Editions shall meet all of the following conditions:

Shall have the same recipient qualification stated in the Market Served statement.

The qualified recipients on the lists shall be in the same consumer demographic or business, occupation, etc.

Fifty percent of the editorial content shall be common in words, not layout, between/among all Editions. Geographic Editions require only common editorial scope. In both types of Editions, advertising need not be common between/among Editions.

The Editions shall be identified separately on advertising rate source material and in circulation promotion. In advertising rate source material, separate reference to each Edition's frequency, issuance and closing dates is required.

The separate Editions shall be subsets of an existing circulation that do not expand or increase the magazine's circulation base and frequency of issue.

If, after consideration of the above conditions, the CEO of BPA determines that the magazine is, in effect, a single magazine, the media owner will be given the option to report the circulations for each edition separately. If the media owner opts to report each edition separately, the media owner shall be required to report as follows:

To report such editions separately in paragraphs 2, 3, 5, and the explanatory paragraph, Additional Data, of the brand report and audit report.

To report such editions separately in paragraph 5 of the brand report and audit report when variances in the data between the editions exist to the extent of 10% or more in any of the categories reported in paragraph 4. When variances of less than 10% exist, the media owner shall have the option of reporting these data separately.

When the CEO of BPA determines that the magazine is, in effect, a single magazine, but the media owner wishes separate brand reports and audit reports for each edition, separate memberships will be required.

1-3 104 Supplements

When a magazine has a supplement, as defined by local postal regulations, the CEO of BPA shall determine whether the magazine is a single qualified magazine or is, in effect, two or more separate magazines requiring separate memberships, brand reports and audit reports for each magazine. In order to qualify as a single magazine, the host magazine and the supplement shall meet all of the following conditions:

The supplement shall have the same recipient qualification and market served as the host magazine.

The qualified recipients on the lists shall be in the same target market. The supplement's recipients may be a subset of the host magazine's qualified recipients.

The supplement shall be identified separately on advertising rate source material and in circulation promotion. In advertising rate source material, separate reference to each supplement's frequency, issuance and closing dates is required.

(a) Based on US Postal regulations, US based magazines shall also conform with the following:

A magazine supplement shall be one or more pages formed by one or more printed sheets that are not bound into the magazine. A supplement may be devoted to a single topic and may contain material different from that in the host magazine, but there shall be common editorial scope.

A loose supplement to a bound magazine shall contain at least 25% non-advertising matter and bear the endorsement "Supplement to" followed by the title of the magazine or the name of the media owner. A bound magazine with one or more supplements not bound into the magazine shall be enclosed in a wrapper. If a supplement to a bound magazine is formed of more than one sheet, all sheets making up the supplement shall be bound together.

A supplement to an unbound magazine shall be combined with and inserted within the magazine. If the supplement is included loose outside the unbound magazine, the magazine and its supplement shall be enclosed in a wrapper or envelope, and the supplement shall bear the endorsement "Supplement to" followed by the title of the magazine or the name of the media owner.

- (b) Based on UK Presstream regulations, UK based magazines shall also conform with the following:

Supplements (excluding catalogues, directories, brochures, product cards and loose inserts) which do not constitute separate periodicals-either available for purchase or distributed in their own right-shall be related to a periodical and distributed to the same address list as the periodical itself.

The supplement shall carry on its front cover the date/month/season and title of the periodical to which it is a supplement. The supplement shall be published by the same media owner as the periodical.

- (c) For all other magazines, local postal regulations and definitions of a "supplement" shall prevail.

If, after consideration of the above conditions, the CEO of BPA determines that the magazine is, in effect, a single magazine, the media owner will be given the option to report the circulation and any special marketing data (i.e. buying influence, etc.) of the supplement at the end of the regular brand report.

If the frequency of the supplement does not give cause to publish the supplement with the analyzed issue, and the media owner opts to report the supplement at the end of the regular brand report, an additional analysis and audit test will be required of the issue which includes the supplement.

The supplement shall have the same market served as the host magazine.

The supplement's recipients may be a subset of the host magazine's qualified recipients.

The supplement shall be identified separately on advertising rate source material and in circulation promotion. In advertising rate source material, separate reference to each supplement's frequency, issuance and closing dates is required.

If, after consideration of the above conditions, the CEO of BPA determines that the supplement may be reported within the host circulation report the media owner shall be required to report as follows:

Separate tables shall be used to report the supplement in Paragraph 3. Paragraph 3 shall include a footnote disclosing the recipient selection criteria.

Reporting of supplements shall be required in Paragraph 2 by issue date. If reported, additions and removals shall be reported by issue, not by supplement.

All supplements shall be reported in accordance with the above. If the frequency of the supplement does not give cause to publish the supplement with the analyzed issue, a reporting of the supplement shall still occur in Paragraph 3 by reporting the results of the supplement's circulation selection criteria against the analyzed issue's circulation file.

1-3 105 Single Magazine – Optional Separate Memberships

When the CEO of BPA determines that the magazine is, in effect, a single magazine, but the media owner wishes separate brand reports and audit reports for each edition or supplement, separate memberships will be required. When editions or supplements are reported separately, additional audit fees shall be charged at a prorated hourly rate for all audit time spent over the allotted hours for the combined total distribution of all editions or supplements as set by the Board of Directors.

It may be a catalog independently operated and independently distributed, if otherwise qualified under the Bylaws and Standards.

It shall practice qualified circulation as defined in Section 1-3 201 of these Standards, and shall have done so for at least three months before being eligible for an initial audit, subject to the approval of the CEO of BPA.

1-3 200 DEFINITIONS AND REPORTING REQUIREMENTS

QUALIFIED CIRCULATION

1-3 201 Qualified Circulation

That circulation for which the mailing address conformance to the Market Served, and correct classification in paragraph 3 are verified by auditable documentary evidence, dated as shown in paragraph 4 (source/age) of the brand report. (Reporting in paragraph 4 is required for non-paid circulation and optional for paid circulation.)

Normal addition and removal activity includes removing subscribers that indicate they no longer wish to receive the publication and non-deliverable addresses.

1-3 202 Qualified Recipients

Recipients who meet the circulation terms of recipient qualification within the Market Served (See 1-3 403).

1-3 203 Market Served

A statement by the media owner describing, in terms of qualification, one or more selected markets, population groupings or specialized interests with clearly defined limits, to whom the magazine is directed. Auditable documentary evidence shall be available to support the conformance to the terms of qualification (See 1-3 403).

1-3 204 Qualification Period

The age of documents used to qualify circulation in paragraph 4 of the brand report. The maximum qualification period for non-paid subscribers is three years ended with any day of the month of the issue analyzed. The auditor shall not accept any qualification source dated outside the qualification period (See 1-3 242).

QUALIFIED NON-PAID CIRCULATION

1-3 205 Qualified Non-Paid Circulation

That circulation which meets the requirements of the qualified circulation definitions and which is distributed free of charge to the recipient (See 1-3 201).

QUALIFIED PAID CIRCULATION

1-3 206 Qualified Paid Subscription Circulation

Circulation that is not for resale, meets the definition for qualification circulation and the requirements listed below.

Subscription payment orders shall conform to the following conditions:

It may be paid for at any price, and shall not be free of charge.

Payment shall not be delinquent for more than six months after the beginning of the subscription service.

A subscription of any category reported as “paid” in paragraph 1, which is not paid for at the time of ordering, is considered a credit subscription. A credit subscription shall be counted as paid circulation up to six months from the date of the first issue served. If payment for such subscriptions has not been received within six months from the date of the first issue served, such copies shall be deducted from the total qualified paid copies served during this period.

A subscription sold on a “renew until forbid” basis may be reported as paid circulation until the subscriber cancels. All copies served from the moment the consumer cancels the subscription until the media owner receives notification of the cancellation, shall be reported as paid circulation as long as the media owner receives payment for the issues served (either from the consumer or agent). If the media owner is debited for unpaid copies served, then only the copies served which meets the arrears criteria may be reported in paid circulation (See Arrears, Section 1-3 209).

No promotional incentive or other inducement may be offered which has an advertised value, or cost to the media owner, of more than 50% of the subscription offer price.

Subscriptions sold with an advertising contract shall be paid in addition to the regular advertising contract; and shall give the advertiser the option of deducting the subscription price from the contract if they do not wish to receive the magazine.

Subscriptions sold with a portion of the proceeds going towards a charitable contribution shall exclude the charitable contribution from the subscription order amount.

- (a) Subscriptions sold via the redemption of affinity program points, e.g. frequent flyer miles, loyalty program points, etc., shall adhere to the following:

Participants shall elect to participate in the program;

The earning of miles, points, etc., shall be transaction based or activity based. For example, points earned for credit card purchase/borrowing activity and purchase of air travel, hotel stays, or car rentals, etc. qualify; points for activity, such as completing surveys, participating in focus group, etc. also qualify.

Points shall be accruable towards future redemption's;

Points awarded upon enrollment shall be less than 50% of the lowest valued product/ service offered in the program;

All affinity point programs shall offer non-magazine products/services. Magazines may not represent more than 75% of each program.

The value of non-magazine products/services shall be equal to or greater than the lowest valued magazine.

The redeemable units of measure, e.g. miles, shall have a recognizable and accepted monetary value.

Adequate documentation of the transfer or redemption of the units of measure, e.g. frequent flyer miles, shall be made available to the audit staff.

The CEO of BPA shall have final approval of all affinity programs prior to acceptance for use in obtaining qualified paid circulation.

- (b) Copies exchanged for goods or services, or sold without using money (barter) may be claimed as qualified paid (barter) circulation providing:

The requirements relating to qualified paid circulation have been met.

The goods and services exchanged must have been sold in the public domain over the last twelve months and have a clearly identifiable and established market value.

The media owner is in possession of a written agreement with the purchaser, supported by invoiced transactions showing the quantities of copies/goods and services bartered and their value.

The media owner has provided proof that the barter transactions have been recorded in the publishing company's accounting system and subsequent financial statements.

The value of the copies sold is not subsequently redeemed by free advertising.

The goods or services provided in exchange for the publication are not related to the supply of the publication (e.g. costs for distribution or marketing of the publication).

1-3 207 PAID CIRCULATION TERMINOLOGY/DEFINITIONS AND REPORTING REQUIREMENTS (Where Applicable)

1-3 208 Advanced Renewals

A subscription renewed prior to expiration date of previous subscription.

1-3 209 Arrears (Post-Expiration Copies Included In Qualified Paid Circulation)

Subscriptions reported as paid that are retained on the circulation list after their expiration date, for up to 25% of the original term ordered, with a maximum of three months, six months for international circulation.

Post-expiration copies, if served, must be distributed prior to the distribution of the next regularly scheduled issue.

Multi-Copy Same Addressee and Public Place subscriptions cannot be reported as paid circulation after the expiration dates.

Magazines issued on a regular frequency but less often than monthly, and magazines that have a break in service (e.g., published seasonally), may serve arrears as paid circulation, subject to the approval of the CEO of BPA.

Magazines issued weekly may use a common monthly expire date. Following this common expiration date, service of arrears is permissible for the full three months.

If a common expire date by month is used by a weekly magazine, the following comment shall be included in the explanatory paragraph, Additional Data, referencing paragraph 6:

"This magazine has a weekly frequency and uses a common expire date in each production month. Therefore, a subscriber may receive one to three additional copies beyond the three months of service permitted as 'arrears' after the subscription expired. These additional copies are not reported as arrears."

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration date for domestic circulation, and six months after the expiration date for international circulation.

1-3 210 Average Annual Order Price

See 1-3 412

1-3 211 Base Prices

Subscription Sales - The established prices for each subscription term as defined in the masthead or online. Only one base price per country may be established for each subscription term.

Single Copy Sales - The suggested retail cover price shall be the base price.

Refer to 1-3 237 for guidance on changes to base price or frequency.

1-3 212 Combined Sales (Including Partnership Sales)

Subscriptions to multiple publications or publications and products or services sold together at a special rate, and charitable donations combined with non-deductible subscriptions (See 1-3 412).

Comment shall be made in the explanatory paragraph, Additional Data, providing details of the number of copies of each magazine sold in combination with another magazine/product/service.

A media owner may disclose the price of each item of the combination sale or simply the value of the magazine subscription. If this option is chosen, the disclosed value of the magazine subscription shall be used in determining the "Average Annual Subscription Order Price for the Period Reported", which shall be stated on the front page of the brand report and audit report. The disclosed value cannot be in excess of the total price to be paid for the entire package offered.

In the absence of individual item or magazine price disclosures, the value of the subscription will be calculated as follows:

In order to determine the value of the subscription you shall first sum the recognized retail value (base value) of all the individual elements of the combination offer. The ratio of the bundled offer price to the sum of the individual elements determines the discount rate. This rate is applied to the base rate of the magazine to determine the "Average Annual Subscription Order Price for the Period Reported". The latter shall be stated on the front page of the brand report and audit report.

Example offer:

12 month subscription to XYZ (base rate \$20.00)
1 widget (base value \$15.00)
3 Months Risk Free access to a Web site (base value \$25.00)
Combination Rate: \$25.00

Calculation: $\$20.00 + \$15.00 + \$25.00 = \60.00
Offer: $\$25.00 / \$60.00 = 41.6\%$
Discounted Magazine Price: $.416 \times \$20.00 = \8.33

The value of \$8.33 would then be used in calculating the "Average Annual Subscription Order Price for the Period Reported" (See 1-3 404b).

Magazine subscriptions sold in combination with other magazine subscriptions shall be reported within the explanatory paragraph, Additional Data.

1-3 213 Combined Sales: Multiple Media Channels of the Same Brand

Subscriptions to multiple media channels of the same brand, including but not limited to: magazine, website access, email newsletters, webinars, white papers, etc. sold together at a special rate. The price paid for the combined offer shall be used to determine the value of the subscription. Comment shall be made in the explanatory paragraph, Additional Data providing details of the number of subscriptions sold in combination with other branded media channels.

1-3 214 Credit Subscriptions

A subscription that is ordered for which no payment has been received. Credit subscriptions shall adhere to qualification requirements per paid circulation (See 1-3 206).

1-3 215 Expiration Date

Terminating date of subscription. Magazines issued weekly may use a common monthly expire date (See 1-3 209).

1-3 216 Extension

Advancing the expiration date of a subscription because of a reduction in the frequency of issues or a reduction in the subscription price (See 1-3 237).

1-3 217 Gift Subscriptions

Subscriptions Purchased for persons who are friends or family and not the purchaser's employees.

"Gift Subscriptions" shall be reported as "Individual" in paragraph 1, only when the media owner has documentary evidence showing that the copies are individually addressed. If not, they shall be reported as "Multi-Copy Same Addressee".

Gifts from a single donor in excess of 50 copies must be noted in the explanatory paragraph, Additional Data (See 1-3 218)

If a donor has a financial interest in the magazine copies purchased, these may not be included in qualified circulation, unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the donor and not for the benefit of the magazine.

Money collected from an agent for gift subscriptions need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original donor.

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration date for domestic circulation and six months after the expiration date for international circulation. (See 1-3 209).

1-3 218 Gift Subscriptions (50 or more same donor)

Magazines electing to report qualified non-paid and qualified paid circulation separately in paragraphs 2 through 6 and reporting gift subscriptions in excess of 50 subscriptions purchased by one donor as "Individual" circulation in paragraph 1 of the brand report, shall report an analysis of that circulation in the explanatory paragraph, Additional Data as follows:

"Whenever more than 50 subscriptions are sold as gifts purchased by one donor and reported as "individual" in paragraph 1, it is required to disclose the range of subscriptions sold in this manner. Accordingly, (number) gift subscriptions were sold ranging from (lowest number) copies to a high of (number) per order at the following subscription prices...."

The copies are individually addressed to recipients who are (explain the relationship between the donor and the recipient) e.g. friends or family of the donor."

The media owner may add explanatory information to these notes to better define the relationship of the donor.

1-3 219 Group Subscriptions

Purchased in lots of 11 or more, paid for by an employer for their employees and mailed by the media owner to individual addresses furnished by the employer. These subscriptions shall be reported as "Sponsored Individually Addressed."

Copies purchased in lots of 10 or fewer, paid for by an employer for their employees and mailed by the media owner to individual addresses furnished by the employer shall be reported as "Individual."

Copies purchased in lots of 11 or more, paid for by an employer for their employees and mailed by the media owner to the same addressee shall be reported as “Sponsored Multi-Copy Same Addressee.”

Copies purchased in lots of 10 or fewer, paid for by an employer for their employees and mailed by the media owner to the same addressee shall be reported as “Multi-Copy Same Addressee.”

1-3 220 Membership Benefit Subscriptions

Deductible Membership Benefit Subscriptions: Individual subscriptions paid for out of membership dues, where recipients have the option of deducting the subscription price from their dues if they do not wish to receive the magazine.

Non-deductible Membership Benefit Subscriptions: Individual subscriptions paid for out of membership dues, where recipients do not have the option of deducting the subscription price from their dues, and automatically receive the magazine.

Non paid subscriptions may only be reported as membership benefit if the publication is owned and published by the association, or if the board of directors of the association/membership passes a board resolution stating the publication is a membership benefit. The association/society does not need to own the publication for it to be a membership benefit.

Associations/memberships purchasing subscriptions for their members shall not be reported as membership benefit, such subscriptions shall be reported as sponsored sales.

Deductible and non-deductible membership benefit subscriptions need not be the “official” publication of the association/membership.

The non-deductible offer may be for a digital version of a magazine without receiving a specific request to receive the magazine electronically (See 1-3 514q). However, with each delivery of a digital copy (or its email alert) the member must be given the opportunity to opt out of receiving the copy in digital format. Those opting out shall be removed from the qualified circulation list within 30 days of receipt of the communication.

If reporting paragraph 4 for source and age, deductible subscriptions are sourced as request circulation non-deductible are sourced as membership benefit circulation.

An annual membership communication (e.g. dues invoice, membership packet, promotional letter) shall clearly state the amount of dues allocated for payment of the subscription, and whether the subscription amount is deductible or non-deductible. If the magazine is to be sent in digital format, the communication must include this disclosure.

1-3 221 Membership Benefit Subscriptions – Disclosure Standards

Magazines electing to report qualified non-paid and qualified paid circulation separately in paragraphs 2 through 5 and reporting “membership benefit” circulation in paragraphs 1 and 3 of the brand report shall report an analysis of that circulation in the explanatory paragraph, Additional Data as follows:

When applicable, shall state, "..... is the official magazine of “

In addition, the following shall be stated:

“Qualified paid Membership Benefit subscriptions averaging copies were sold to qualified recipients at the following subscription prices.....

Members yearly subscription price is included in the dues and is...(deductible/non-deductible)...there from.”

The media owner may add explanatory information to these notes to better define the membership organization.

1-3 222 Non-Deductible Subscriptions

Individual subscription paid for as part of a reservation fee for conferences, meetings, seminars, etc., where the recipient does not have the option of deducting the subscription price and automatically receives the magazine. The offer shall clearly state the amount of money allocated for payment of the subscription.

Such offers shall qualify as paid circulation, (See 1-3 206), and shall be reported as other than request, or written communication from recipient or recipient's firm in paragraph 4 (when reported) of the brand report and shall have a footnote reading "See the explanatory paragraph, Additional Data." The explanatory paragraph, Additional Data shall include a comment describing the offer and the number of copies so reported.

1-3 223 Post Expiration Copies Included in Paid Circulation Up To Three Months - See: Arrears, Section 1-3 209

1-3 224 Promotional Incentive

Any inducement offered to a subscriber for free with their own subscription.

When subscriptions are sold with a promotional incentive, the value of the incentive cannot exceed 50% of the total offer price of the subscription(s).

The value of the premium is considered to be the actual cost to the media owner, or the recognized retail value, or the represented value, whichever is highest.

If a back copy is included in a subscription offer, it will be considered a promotional incentive unless the subscription is put on a retroactive basis.

If paragraphs for Total New and Renewed Qualified Paid Subscriptions Ordered/Sold for the Period are reported, please see Section 1-3 413 of these standards.

For Single Copy Sales, a promotional incentive (cover mount) is any inducement offered by the last agent in the chain of distribution (point-of-purchase).

Any inducement attached to, or polybagged with, a single copy at the point-of-purchase is considered a promotional incentive (cover mount).

When single copies are sold with a promotional incentive, the value of the incentive cannot exceed 50% of the cover price. The value of the promotional incentive is considered to be the actual cost to the media owner, or the recognized retail value or represented value, whichever is highest.

Magazines reporting any Single Copy Sales sold with a promotional incentive (cover mount) shall show in the explanatory paragraph, Additional Data an issue-by-issue analysis of the number of single copies sold with a promotional incentive. The nature of the promotional incentive (cover mount) and provisions of the offer shall also be described.

Single copies sold in Europe with a promotional incentive (cover mount), shall report copies sold as "qualified paid," regardless of the value of the promotional incentive offered.

During a temporary study period single copies and subscriptions sold in the Middle East with a promotional incentive shall report the subscription as "qualified paid," regardless of the value of the promotional incentive.

Free promotional incentives, the contents of which have been published either in print or digital medium, are reported as "sold with editorial promotional incentive (including reprints)."

Editorial promotional incentives include:

- reprints of magazine sections,
- books,
- other printed reference matter (paid annual periodicals excluded),
- pamphlets,
- disks containing items such as compilations of magazine editorials, software demonstrations,
- clip art, fonts, etc.

For additional standards regarding services or products sold in combination with a magazine, see standards regarding Combined Sales, Section 1-3 212.

1-3 225 Renewal

A subscription, which has been renewed within six months of its expiration date and paid for within six months following receipt of the renewal order.

1-3 226 Renewal Rate

The number and percentage of expiring subscriptions, which have been renewed within six months of their expiration, date and paid for within six months following receipt of the renewal order (See 1-3 414).

1-3 227 Single Copy Sales

Those copies of a magazine sold through newsstands and other retail outlets and reported as qualified circulation throughout a BPA Worldwide consumer magazine audit brand reports or audit reports. These sales shall be reported separately in paragraphs 1, 2, 3, 4, (if reported) and 5 and, when required, in the explanatory paragraph, Additional Data.

If a publisher is reporting estimated single copies sales for an analyzed issue, they may choose to report the estimated sales by each state/province, or as one figure in the geographic table.

For auditing single copy sales, final settlement figures shall be available for at least half of the issues in the period. The balance of issues may be projected based on an historical average of the settled issues.

Examples of three-month initial audit eligibility dates:

Weeklies shall have seven issues settled;

Monthlies shall have one issue settled;

Bimonthlies shall have one issue settled;

Quarterlies shall have one issue settled;

Semi-annuals and annuals shall be settled.

An established magazine may project single copy sales for any issue in the three-month initial audit period, so long as a documented record of at least six prior months' net sales is available.

Single copy sales shall conform to the following conditions:

Copies shall be paid for by the last agent in the chain of distribution (point-of-purchase) at any price, and payment shall be remitted to the media owner by the final settlement date (See 1-3 228).

Single copy sales - Non-Returnable: The media owner shall provide signed affidavits from the last agent of sale, supporting the number of copies sold to consumers.

If a media owner does not wish to collect non-returnable single copy sale affidavits, they may use the following formula:

The total possible sale (draw) shall be reduced by a prorated amount calculated on the basis of whatever discounted price is actually remitted by the agent at point-of-purchase. The total amount paid to the media owner from the vendor shall be divided by the cover price to yield copies "sold".

For example, a media owner allows a 50% discount off cover price for vendors on a non-returnable system. If the vendor draws 100 copies at 50% of the \$2.00 cover price, \$100.00 would be paid to the media owner. Dividing this by the \$2.00 cover price yields 50 copies that may be claimed as Single-Copy Sales.

The above method of calculating sales applies to magazines; it does not apply to comic books. Media owners of comic books shall report non-returnable distribution as the whole number of copies sold to retailers, not distributors, and shall be reported as Non-Returnable Distribution in Paragraph 1, identified separately in Paragraph 3, and reported by region within Paragraph 5, if advertising is sold on a regional basis.

Media owners of comic books who report Non-Returnable Distribution shall state within the Method of Distribution (the explanatory paragraph, Additional Data): "Non-Returnable Distribution are copies placed for sale on a non-returnable basis and are audited to the point of distribution. BPA Worldwide has verified the number of copies ordered, the number of copies shipped and that these were paid for by the retailer. The actual number of copies sold by the retailer is not verified during the audit process."

No promotional incentive or other inducement may be offered which has a recognized retail value or represented value, or cost to the media owner, of more than 50% of the magazine's suggested retail cover price.

Magazine members reporting single copy sales in China must include the following footnote on all brand reports and audit reports if single copy sales equal 10% or more of average total qualified circulation for the period: "BPA Worldwide has verified the number of copies printed, the number of copies shipped to the first point of the distribution channel, and that copies were paid for by the distributor at the first point of the sale chain. The actual number of copies sold by the retailer to the end consumer cannot be verified, due to the current retail system."

Magazines reporting single copy sales in paragraph 1 and include single copy sales that are multi-copy sales and/or non-returnable sales in that figure, shall report single copy sales, multi-copy sales and non-returnable sales on an issue-by-issue basis in the explanatory paragraph, Additional Data.

At the option of the media owner a breakout of single copy sales by type of outlet, (for example, newsstand, retail store, etc.) and/or by domestic and international circulation can be reported in the explanatory paragraph, Additional Data.

Magazines reporting single copy sales in paragraph 1 and including non-returnable in that figure, shall note the methodology used to determine net sales in the explanatory paragraph, Additional Data (See 1-3 229).

Copies sold on a single-issue basis through newsstands and other retail outlets shall be reported as "single copy sales" one year old (See 1-3 505).

1-3 228 Single Copy Sales - Final Settlement Date

The date by which single copy sales accounts for an issue shall be closed after which copies may no longer be counted as paid.

The "*final settlement*" date may be no longer than twelve months from the on-sale date of the subsequent issue for domestic sales and eighteen months from the on-sale date of the subsequent issue for international single copy sales.

If returns are received following the final settlement date, they shall be reported as unsold copies.

Example of final settlement dates for domestic circulation of various frequencies are as follows:

Weekly: The first issue in January has a final settlement date of up to the second week in January of the following year, which is twelve months from the on-sale date of the second issue in January.

Monthly: The January issue of a monthly magazine with an on-sale date of the week prior to issue date has a final settlement date of up to the last week in January of the following year, which is twelve months from the on-sale date of the February issue.

Bi-monthly: The January/February issue which goes on sale for the last week of the first month has a final settlement date of up to the last week in March of the following year, which is twelve months from the on-sale date of the March/April issue.

Quarterly: The Winter issue (January-March) of a quarterly magazine issued on the 1st of each quarter but placed on sale two weeks prior (mid-December), has a final settlement date of up to the third week of the following March, which is twelve months from the on-sale date of the Spring issue.

Semi-Annual: The Winter/Spring issue which goes on sale January 1 has a final settlement date of up to July of the following year which is twelve months from the on-sale date of the Summer/Fall issue.

Annual: The current edition of an annual magazine issued on the 1st of each year but placed on sale six weeks prior (mid-November), has a final settlement date of up to the third week in May of the year following the subsequent edition, which is six months from the on-sale date of that subsequent issue.

1-3 229 Single Copy Sales (Non-Returnable)

Copies provided to wholesalers/retailers for resale for which returns will not be accepted, shall be reported as single copy sales in paragraph 1, identified separately in paragraph 3 and shown on an issue-by-issue basis in the explanatory paragraph, Additional Data.

Media owners of Comic Books shall report all such circulation as “Non-Returnable Distribution”.

1-3 230 Sponsored Circulation – Disclosure Standards

If sponsored orders represent 5% or more, but less than 10% of all orders for the period the “Sponsored Average Annual Order Price” shall be reported in the explanatory paragraph, Additional Data.

If sponsored orders represent 10% or more of all orders for the period the “Average Annual Sponsored Order Price for the Period” shall also be reported separately in the explanatory paragraph, Additional Data and the Price and Frequency table (See 1-3 404b and 1-3 412).

If sponsored subscriptions represent 5% - 9.9% of the Average Total Qualified circulation reported for the period, the details of the sponsored subscription (price, term, nature of sponsorship) shall be noted in the explanatory paragraph, Additional Data.

If sponsored subscriptions represent 10% or more of the Average Total Qualified circulation reported for the period, the nature of the sponsored subscriptions shall be disclosed in the Market Served and full details (price, term, nature of sponsorship) shall be noted in the explanatory paragraph, Additional Data with a footnote under paragraph 1 referencing “See Explanatory Paragraph, Additional Data.”

1-3 231 Sponsored Individually Addressed Circulation

Individually Addressed Subscriptions purchased in lots of 11 or more that promote the interests of the sponsor/donor and that otherwise conform to the definition of Qualified Paid Circulation shall be reported as “Sponsored Individually Addressed” circulation. This includes sponsored and group subscriptions that are not Sponsored Multi-Copy Same Addressee.

Sponsored Individually Addressed barter circulation shall be reported separately in the Summary Section, page one, paragraph 1 (Average Qualified Circulation Breakout for Period), and paragraph 3 (Breakout of Qualified Circulation to Consumer Markets for Issue Analyzed).

If the purchaser has a financial interest in the magazine, these purchased copies may not be included in qualified circulation, unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the purchaser and not for the benefit of the magazine.

Money collected from an agent for Sponsored Individually Addressed subscriptions need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original donor. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor) (See 1-3 503).

1-3 232 Sponsored Single Copy Sales

Copies of an issue purchased in quantities of two or more that promote the interest of the purchaser and otherwise conform to definition of qualified paid circulation, shall be reported as “Sponsored Single Copy Sales” in paragraph 1, identified separately in paragraph 3 and shown on an issue-by-issue basis in the explanatory paragraph, Additional Data.

Money collected by an agent need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor) (See 1-3 503).

Sponsored Single Copy barter circulation shall be reported separately in the Summary Section, page one, paragraph 1 (Average Qualified Circulation Breakout for Period), and paragraph 3 (Breakout of Qualified Circulation to Consumer Markets for Issue Analyzed).

1-3 233 Sponsored Multi-Copy Same Addressee Circulation (See 1-3 234)

Copies purchased in lots of 11 or more that promote the interests of the sponsor/donor and are sent to a single addressee, and which otherwise conform to the definition of qualified paid circulation, shall be reported as “Sponsored Multi-Copy Same Addressee.”

Qualified paid Sponsored Multi-Copy Same Addressee Circulation may be classified as “Sponsored Individually Addressed” subscriptions in paragraphs 1 and 3 of the brand report only when the media owner has documentary evidence showing that the copies are redistributed to qualified recipients.

Copies purchased in lots of 10 or fewer that promote the interests of the sponsor/donor and are sent to a single addressee, and which otherwise conform to the definition of qualified paid circulation, shall be reported as “Multi-Copy Same Addressee” (See 1-3 248).

Sponsored Multi-Copy Same Address barter circulation shall be reported separately in the Summary Section, page one, paragraph 1 (Average Qualified Circulation Breakout for Period), and paragraph 3 (Breakout of Qualified Circulation to Consumer Markets for Issue Analyzed).

1-3 234 Disclosure Requirements For Both Multi-Copy Same Addressee and Sponsored Multi-Copy Same Addressee Circulation:

Multi-Copy Same Addressee and Sponsored Multi-Copy Same Addressee subscriptions cannot be reported as paid circulation after the expiration date.

If the number of subscriptions involved in any single Multi-Copy Same Addressee or Sponsored Multi-Copy Same Addressee sale exceeds 5% of the Average Total Qualified circulation claim for the period, the subscriptions involved in that sale shall be separately and fully explained (price, term, nature of subscription) in the explanatory paragraph, Additional Data. Reporting of the actual name of the sponsor/purchaser is optional (See 1-3 404).

Example: (explanatory paragraph, Additional Data):

"Distribution includes a paid multi-copy same addressee contract for 1,000 copies or 8.0% of Average Total Qualified purchased by a hotel (option to name hotel) for its guests and visitors paid at an annualized subscription rate of \$20 for 12 issues."

If the number of subscriptions involved in any single Multi-Copy Same Addressee or Sponsored Multi-Copy Same Addressee sale exceeds 10% of the Average Total Qualified circulation claim for the period, the subscriptions involved in that sale shall be disclosed in the Market Served and fully explained (price, term, nature of subscription) in the explanatory paragraph, Additional Data (See 1-3 405). Reporting of the actual name of the sponsor/purchaser is optional (See 1-3 404).

Example: (Market Served):

"Distribution includes a multi-copy same addressee contract with an airline (option to name airline) to passengers for in-lounge and in-flight – see explanatory paragraph, Additional Data."

Example: (explanatory paragraph, Additional Data):

"Sponsored multi-copy same addressee copies include a contract with an airline (option to name) for 2000 copies or 16.0% of Average Total Qualified for distribution to passengers in-lounge and in-flight at an annualized subscription rate of \$5 for 12 issues."

If a purchaser of such copies has a financial interest in the magazine, these copies may not be included in qualified circulation, unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the purchaser, not for the benefit of the magazine.

Money collected from an agent for multi-copy subscriptions to the same addressee need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original subscribers or sponsor. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor) (See 1-3 503).

When an agent is awarded the right to be the sole distributor of multiple copies to selected franchisee or corporately-owned retail locations, the agent may authorize the distribution agreement. The agreement shall include the list of locations where the copies are to be sent, with full address, telephone number, the quantity per location, and the contact person for each location. Distribution contracts between the agent and each retailer (franchisor or corporate head office) shall be provided to the auditor.

1-3 235 Multi-Copy Same Addressee (Paid) Disclosure Standard

If paid multi-copy same addressee represents 5% or more of the Average Total Qualified circulation and magazines elect to report qualified non-paid and qualified paid circulation separately in paragraphs 2 through 5 of the brand report shall report an analysis of that multi-copy same addressee circulation in the explanatory paragraph, Additional Data, as follows:

"Qualified paid multi-copy same addressee subscriptions averaging copies were sold, in quantities of to, to qualified recipients at prices from to....."

1-3 236 Subscriptions

Contractual agreement by an individual or a firm to purchase one or more copies of a magazine for a given period at a price.

1-3 237 Subscription Extensions

Number of subscriptions extended because of subscription price reductions or a reduction in the frequency of issue will be reported in the explanatory paragraph, Additional Data.

- (a) When a media owner reduces the base annual price of a magazine, subscriptions are extended as follows:

The unexpired portion of the subscription shall be extended in the ratio that the value of such unexpired portion at the old base rate bears to the new base rate.

All calculations shall be made effective from the date of the issue with which the price change has occurred.

When a media owner has reduced the base annual price and has extended the expiration date as specified above, and then, at a later date, has raised the basic annual price the new expiration dates for subscriptions originally extended shall be cut back in the ratio that the newest base price bears to the last base price. All calculations shall be made effective from the date of issue with which the price change has occurred.

When a media owner increases the frequency without a change in subscription rates, the media owner may extend the subscription period ordered by the subscriber. Details regarding subscription extensions shall appear in the explanatory paragraph, Additional Data.

1-3 238 Sweepstakes, Prize Draws or Contests

Any subscription offer in which a prize is offered by lottery shall be considered as sold using a sweepstakes, prize draw or contest.

Details regarding these offers shall be reported in the explanatory paragraph, Additional Data of the brand report, regardless of whether or not paragraph 4 is reported.

(a) **Sweepstakes, Prize Draws or Contests – Paid Disclosures**

Whenever a sweepstakes, prize draw, or contest is offered to individual recipients as an inducement to obtain qualified paid request circulation, the media owner shall appropriately footnote the number of subscriptions sold through the use of these offers in paragraph 4 and provide an explanation of such offers in the explanatory paragraph, Additional Data as follows:

"... recipients reported as request circulation in paragraph 4 were obtained through the use of sweepstakes offers..."

Media owners electing to use sweepstakes prize draw or other contest offers to develop qualified non-paid circulation shall comply with the following conditions:

Non-paid recipients qualified through the use of these offers shall be reported as other sources in paragraph 4.

The media owners shall identify such sweepstakes offers and the quantity reported as other sources in a footnote in the explanatory paragraph, Additional Data as follows:

"... recipients reported as other sources in paragraph 4 were obtained through the use of sweepstakes offers."

(b) **Sweepstakes, Prize Draws or Contests – Non-paid Disclosures**

Whenever a sweepstakes, prize draw, or contest is offered to individual recipients as an inducement to obtain qualified non-paid circulation, these recipients shall be reported as "Other Sources" (See 1-3 531).

1-3 239 Term of Subscription

Length of time a media owner contracts with a subscriber to send issues of the magazine, usually one, two or three years.

1-3 240 Third-Party Agents

Subscriptions sold through agencies. The agency shall be a recognized business concern. It shall be the media owner's responsibility to provide proof of qualification for such recipients.

Money collected by an agency need not be remitted to the media owner, provided that necessary records are in place to document the purchase and price paid by the original subscriber.

Agents shall not be sponsors of subscriptions or single copies. Having a "doing business as" (DBA) name is not sufficient to establish an agent's DBA operation as a sponsor.

1-3 241 OTHER GENERAL DEFINITIONS AND REPORTING REQUIREMENTS

1-3 242 Back Copies

Any issue of the magazine dated prior to the current issue shall be considered a back copy whether served to a new or requalified/renewed recipient. The "current issue" is defined as the most recent issue distributed or placed on sale, whichever comes first.

Back copies may be counted as either qualified paid or non-paid circulation only for one issue immediately preceding the issue current at the time the recipient is distributed the back copy for magazines other than weeklies or for two issues for weekly magazines.

When the recipient has specifically requested back copies of a magazine such copies may be counted as qualified circulation up to three issues preceding the date of the subscription order for all magazines.

If a media owner wishes to back start a controlled publication beyond one issue, the media owner shall separately ask the recipient if he/she wishes to begin the subscription with the back copy, and the recipient shall respond affirmatively. This question shall be separate from the original "request" to receive the magazine, for example:

Do you wish to receive XYZ publication?

Yes___ No___

If yes, do you wish to begin your subscription with the (back copy) issue?

All subscribers to receive back copies shall have qualification sources dated within the three-year qualification period for the audit year of the issue served (See 1-3 204).

Special issues such as Directories or Buyers Guides are not considered when determining the numbers of back copies sent to qualified recipients.

To illustrate, XYZ monthly magazine distribution analysis for the May issue (stated date of mailing the seventh of the previous month):

<u>Issue</u>	<u>1st Copy Placed On-Sale</u>	<u>1st Copy Distributed</u>	<u>Subsequent Distribution Dates</u>
May	April 1	April 7	May 9*, June 11**, July 20**
June	May 11	May 12	NA
July	June 1	June 16	NA

* late distribution (See 3 406a).

** late distribution and ineligible back copy distribution; back copies of the May issue distribution after the July issue was placed on-sale and are therefore non-qualified, regardless if copies are for paid or non-paid, new or renewed circulation.

1-3 243 Duplication

The same individual appearing on the qualified circulation list more than once shall be considered duplication. Two or more copies sent to the same company name only at the same address shall be considered duplication. All such copies may be reported as “Multi-Copy Single Addressee” circulation, or the duplicated copies shall be removed from the qualified circulation list (See 1-3 246c).

1-3 244 Digital Magazine

Digital Magazine – A magazine (either with a companion print version or as a standalone digital product) delivered periodically in a digital format (PC, APP, Mobile, Tablet, etc.) with metered (i.e. linear) navigation, that is edited, designed, and contains date-stamped content that includes advertising (but not necessarily the same advertising as might appear in a print version). Though editing, design, and issue identification (i.e. date-stamped content) are significant differences, the primary distinction between a digital magazine and a website is the metering (this can be pagination or any other method of going through the issue from beginning to end).

A digital magazine may be dynamically created, have targeted content, or may exist in parallel with pre-existing media.

Dynamic – Editorial can be created and/or selected at point of delivery. Each recipient may receive a copy with different content and that content can change at any time.

Targeted – Editorial is changed for specifically defined groups and/or platforms before point of delivery. Each group of recipients, whether they are segmented demographically or because of the platform they use to receive the digital product, receive a copy with different content specifically selected for that group. Apart from minor updates, the content cannot change once the issue is made available.

Replica Plus – If a print brand existed first, “plus” is editorial that is retained from the original edition and is redesigned and/or supplemented. Each issue’s content is primarily taken (but not necessarily replicated in its entirety) from the original edition (whether in print or digital). Apart from minor updates, the content cannot change once the issue is made available.

Editorial Replica – If a print brand existed first, editorial and design are unchanged from the original print edition. With a replica digital product, each issue’s content and design are identical to the original edition. Apart from minor updates, the content cannot change once the issue is made available.

Media owners shall disclose in brand reports under a “Statement of Content Platform” the form or combination of forms of digital magazine used per the above definition/description.

Media owners may report digital magazines by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

Circulation for digital magazines shall be reviewed to ensure that the systems of the media owner and their vendor(s) are in compliance with BPA Worldwide standards and policies before such data may appear on a brand report. A special audit may be undertaken to verify the digital distribution. The printing and release of an audit shall be at the media owner’s option. The printing and release of an audit report shall be at the media owner’s option.

In all audit reports and brand reports, digital magazine’s circulation shall be detailed separately in paragraphs one and two, and may be reported separately throughout the balance of the report.

If an alert to a qualified subscriber (paid and non-paid) is undeliverable, the media owner shall remove said subscriber from their circulation file, or ensure that the delivery details are corrected. If magazine frequency is monthly or less often (quarterly, biannual or annual etc.), the correction shall be made prior to distributing the next issue. If the magazine has a higher than monthly frequency (i.e. weekly etc.) the correction shall be made within thirty days.

All recipients of digital editions must receive a digital push alert (email or mobile notification) for each issue. Publishers may provide the subscriber with an opportunity to “opt-out” of receiving an alert notification of availability. If a media owner offers an opt-out to receiving the alert, the media owner shall separately offer an opt-out of receiving the digital magazine. Subscribers who opt-out of receiving the alert but have not opted-out of receiving the digital magazine, need not receive an alert to be reported as qualified distribution. Publications with a daily frequency do not require a digital alert.

Digital magazines with a frequency less than daily may provide the subscriber with an opportunity to “opt-out” of receiving an alert notification of availability. If a media owner offers an opt-out to receiving the alert, the media owner shall separately offer an opt-out of receiving the digital magazine. Subscribers who opt-out of receiving the alert but have not opted-out of receiving the digital publication, need not receive an alert to be reported as qualified distribution. All others must receive an alert for each issue.

Digital magazines with a daily frequency may provide the subscriber with the option to “opt-in” to receiving an alert of availability. An alert is not required for publications with a daily frequency.

Digital non-qualified advertiser and advertiser agency copies may be reported on the BPA Worldwide brand reports and audit reports as non-qualified circulation.

Paid digital copies and non-paid digital copies to individuals who meet the qualification criteria stated in the Market Served, may be reported on the BPA Worldwide-brand reports, and audit reports. Recipients who have not requested to receive the digital magazine must be provided the opportunity to opt out of receiving the digital magazine.

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.

Only one copy of a digital magazine may be considered qualified per single addressee. Digital magazine site licenses may be reported as a media channel on the Brand Report.

Digital subscriptions purchased through tablets/mobile (“Digital First”): Digital circulation shall be reported from copy one and for the full term of subscription.

Paid combination sales and bundled subscriptions (print and digital): the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report digital copies.

Paid sponsored digital tablet/mobile subscriptions: the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report the digital copies.

Paid circulation with digital as a promotional incentive: the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report the digital copies.

Non-Paid circulation: recipient must authenticate (access code tied to subscriber registration/information) the digital subscription through the mobile device and access the magazine/publication once each six month reporting period.

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

If download; retrieved; received data is reported, such data shall be reported in paragraphs 1, 2, 3, 4, 5, and 6.

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 brand report 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.

(a) Members may elect to report the following usage/engagement metrics:

Active Views:

- A) An active view is defined as a single copy of a publication actively opened by a device for viewing.
- B) A minimum of one page of an issue opened/served onto a device.
- C) There must be a distinct action/event by the end user to view. A single action/request which results in both the content being downloaded/made available and the automatic opening of a page of the publication is not considered a distinct action/event. A further distinct action would be required such as opening a second page.
- D) If reported, the active view shall be reported on an issue by issue basis.

Number of Sessions per issue: defined as the aggregate number of times an issue was accessed by all unique browsers (individual devices).

Time Spent in Issue per Individual Device: defined as the time spent, on average, in the issue across all unique browsers (total audience).

Number of Sessions in Issue per Individual Device: defined as the average number of times each unique browser accesses the issue being reported.

Number of Pages Accessed: defined as the total unique pages accessed for each issue by unique browsers.

Single Copy, non-paid, digital – copies may be reported as qualified circulation if the recipient downloads or accesses the issue. One copy may be claimed as qualified circulation for each unique user that accesses/downloads an issue, regardless of the number of times the unique user accesses the issue. Registration or authentication is not required. Publishers and their vendors have the responsibility to install and maintain systems that accurately capture individual download/access activity.

Copies downloaded or accessed using third party digital subscription services may report such copies as “multi-title digital subscriptions” only for the issues the user downloads or accesses for the reporting period. Only unique issue opens shall be reported. Multiple accesses or downloads of issues are only reported as one circulation unit. Paid subscriptions shall adhere to standard 1-3 206. Reporting Average Annual Order Price for these subscriptions is optional.

1-3 245 Digital Magazines - Site Licenses (See Brand Standard 1-1 208)

Site Licenses may only be reported on BPA Brand Reports as a channel of communication (See 1-1 208).

Site licenses are defined as a contract or agreement between a media owner member and a company/association to provide multiple individuals access to a digital edition of the magazine hosted on the subscribing organization’s intranet. The contract/agreement shall require the subscriber/administrator of the site license notify all the individual seats (individuals) of the availability of each issue. Licenses may be reported for definitive amount of seats only, “global” or “companywide” license agreements may not be reported.

Paid site licenses shall adhere to Standard 1-3 206, Paid Circulation.

Non-paid site licenses shall adhere to “Request from Recipient’s Company,” Standard 1-3 517.

The media owner may disclose throughout the BPA Worldwide Brand reports the number of authorized Digital Magazine Site Licenses and Seats (individuals) served as part of the license. Digital Magazine Site licenses and Seats shall not be reported as qualified circulation. A media owner may disclose the number of digital magazine site licenses and authorized seats, including paid and non-paid data, demographic data, license source and age data, and geographic data, using standard BPA Worldwide tables.

Reporting the name of the company to which the content has been licensed shall be optional. Licenses may be reported for definitive amounts only, “global” or “companywide” license agreements may not be reported. Qualified circulation and site license seats may not be summed on the BPA reports.

1-3 246 Method of Distribution

Method of Distribution shall contain one of the following statements concerning the distribution of a magazines reporting digital magazines, or multi-copy same addressee circulation:

(a) **Digital Magazine (See 1-3 244)**

If digital version circulation exists, the Method of Distribution shall be disclosed as follows:

“Print copies are distributed via postal services or other carriers. Recipients of the digital version are notified via [disclose method: email, RSS, instant message, other] when the Version is available.”

(b) **Multi-Copy Same Addressee (See 1-3 234 and 1-3 248)**

If multi-copy same addressee circulation is equal to 10% or more, but less than 25%, of the average qualified circulation and delivery to the end recipient and cannot be verified, the following comment shall be included in the Method of Distribution (last page of the report).

“Multi-copy same addressee circulation is audited only to the point of distribution.”

If multi-copy to the same addressee circulation is equal to 25% or more of the average qualified circulation and delivery to the end recipient and cannot be verified, the following comment shall be included in the Market Served (page one of the report) describing the nature of the multi copy same addressee circulation and reference the Method of Distribution in the explanatory paragraph:

“Multi-copy same addressee circulation is audited only to the point of distribution.”

(c) **Duplication (See 1-3 243)**

If two copies are delivered to the same individual (duplicated copies) and exceeds 25% or more of the average qualified circulation, the following disclosure in the Market Served (page one of the report) and Method of Distribution shall occur. The following comment shall be stated:

“Also qualified copies include duplicated copies served to individuals within the Market Served. These include copies delivered to the same individual appearing on the qualification list more than once.”

If 10% or more, but less than 25% of the circulation is of this condition (duplicated copies), the following comment shall be included under the Method of Distribution:

“Also qualified copies are delivered as Multi-Copy Same Addressee within the Market Served. These include copies delivered to the same individual appearing on the qualification list more than once.”

(d) Trade Show/Event Copies

If trade show, consumer show, and convention distribution are reported as Qualified Circulation, the following comment shall be included as part of the Method of Distribution:

“Distribution to trade shows, consumer shows, and conventions are audited only to the event and not to the end recipients. An agreement from the event management has been obtained indicating that the event will accept a specified number of copies for redistribution. When the media owner exhibits and distributes copies at a show the following shall be stated: The media owner has provided a paid contract for exhibit space. Distribution to the event is supported by delivery receipts from a third party, or confirmed by show management.”

These comments (a-d) may contain additional explanations regarding the character and nature of the distribution, and any other amplification necessary.

1-3 247 Merging Publications: Paid Circulation (Purchase or Transfer of Subscriptions from List of Suspended Magazines)

When a media owner purchases a magazine and/or the subscription list of a magazine that has ceased publishing and transfers the subscriptions to the media owner's own magazine, the following shall apply:

The magazine shall be homogeneous.

A record shall be available indicating the subscriber's election to receive the magazine which has assumed the responsibility to fill the unexpired term of this suspended subscription. This election may be done through a negative option questionnaire. If such documents are returned to the media owner, they shall be considered a request to receive the surviving publication.

This service shall be started within six months after the last issue of this suspended magazine, or within such further time as may be granted by the CEO of BPA.

The original order and proof of payment of the suspended magazine shall be available.

The unexpired portion of the subscription is ascertained by either of the following methods, decided by the CEO of BPA:

By dividing the sum of money due the subscriber at the base annual price of the discontinued magazine by the price per copy of the surviving magazine, said per copy price to be a pro rata price of the base annual subscription price of that magazine.

By counting the number of copies of the discontinued magazine still due the subscriber and crediting the subscriber with this number of copies of the surviving magazine.

A separate analysis of transferred subscriptions shall be made in paragraph 3 for one brand report and one audit report and all details concerning such subscriptions shall be reported in the explanatory paragraph, Additional Data as determined by the CEO of BPA.

The subscriptions cannot be reported as paid circulation beyond the expiration date.

Whenever two or more magazines are merged, request circulation shall be footnoted in paragraph 4 indicating the percentage of request circulation from each of the merged magazines.

1-3 248 Multi-Copy Same Addressee Circulation (See 1-3 234 and 1-3 246b)

Two or more non-sponsored copies of the print version of the magazine (whether or not individually wrapped and addressed) sent to a single addressee. This circulation shall be reported separately in paragraphs 1 and 3 of the brand report.

Locations receiving three or more copies must be given the opportunity to opt-out of receiving the copies or change the quantity of copies received on an annual basis. This circulation shall be supported by proof that the required annual communication (mail, email, telecom) occurred.

Multi-Copy Same Addressee circulation distributed in street racks is permitted, provided that permission is obtained to place racks in public. Such permission must be provided by the municipality governing the public space. If street racks in public spaces are not governed by a municipality or any authority, no permission is required. Rack location, issues and copies per rack, shall be provided to the auditor. This circulation shall be reported separately in paragraphs 3 and 4.

Multi-Copy Same Addressee circulation shall be fully explained in the explanatory paragraph, Additional Data, which shall provide the details of the character and nature of multi-copy circulation, how it is distributed, price received, if any, and any other amplification necessary. See 1-3 234, 1-3 407, 1-3 246b and 1-3 235.

In those countries where it is documented that the normal required method of distribution is multi-copy, same addressee subscriptions for redistribution through an official government department or designated organization (e.g., the People's Republic of China, Cuba, Vietnam, etc.), the media owner shall submit an official written request or communication from the appropriate government department, which specifies the number of magazine copies distributed.

Qualified non-paid Multi-Copy Same Addressee Circulation may be reported as "Individual" copies in paragraph 1 of the brand report when the media owner has documentary evidence showing that the copies are redistributed to qualified recipients.

Qualified paid Multi-Copy Same Addressee Circulation may be classified as "Individual" subscriptions in paragraphs 1 and 3 of the brand report only when the media owner has documentary evidence showing that the copies are redistributed to qualified recipients.

Copies purchased in lots of 10 or fewer that promote the interests of the sponsor/donor and are sent to a single addressee, and otherwise conform to the definition of qualified paid circulation, shall be reported as "Multi-Copy Same Addressee" (See 1-3 233).

If multi-copy same addressee subscriptions represent 5% - 9.9% of the Average Total Qualified circulation reported for the period, the details of the multi-copy same addressee subscriptions (price, term, nature of subscription) shall be noted in the explanatory paragraph, Additional Data.

If multi-copy same addressee subscriptions represent 10% or more of the Average Total Qualified circulation reported for the period, the nature of the multi-copy same addressee subscriptions shall be disclosed in the Market Served and details of the multi-copy same addressee subscriptions (price, term, nature of subscription) shall be noted in the explanatory paragraph, Additional Data with a footnote under paragraph 1 referencing "See explanatory paragraph, Additional Data."

1-3 249 Public Place

Paid and non-paid copies provided, typically in small quantities per location, by the media owner which are intended to be viewed in waiting rooms, hotels, and other locations, and are not intended to be taken away by consumers. Such copies may be individually addressed or shipped as multi-copies to the same addressee.

Public Place subscriptions may not be reported as paid circulation after the expiration date.

If the number of subscriptions involved in any one Public Place subscription sale exceeds 5% of the Average Total Qualified Circulation for the period the subscriptions involved in that sale shall be separately and fully explained in the explanatory paragraph, Additional Data.

Example: (explanatory paragraph, Additional Data):

“Distribution includes a paid public place contract for 1,000 copies or 8.0% of Average Total Qualified circulation purchased by a restaurant chain (option to name restaurant chain) for distribution of 5 copies per location to 200 outlets nationwide for its diners to read onsite, paid at an annualized subscription rate of \$5 for 12 issues.”

If the copies are purchased and the purchaser has a financial interest in the magazine, these copies may not be included in the qualified circulation, unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the purchaser and not for the benefit of the magazine.

Money collected from an agent for Public Place sales need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original subscribers or sponsor. However, each sponsorship sales transaction must be without monetary recourse to the purchaser (sponsor) (See 1-3 503).

All Public Place circulation (sponsored or otherwise) shall be fully explained in the Market Served statement, in paragraphs 3, and in the Method of Distribution statement in the explanatory paragraph, Additional Data, through notation. The explanation shall provide the details of the character and nature of the Public Place circulation, how it is distributed, price received, if any, and any other amplification necessary.

1-3 250 Rate Base

If the magazine has a published rate base, it shall be so stated following the average total qualified circulation claim for the period covered by the report.

Separate indication shall be made to show rate base separately for paid and non-paid circulation if the rate bases are published separately.

Any changes to the published rate base during the period covered by the report shall be included under the explanatory paragraph, Additional Data.

If the magazine does not have a published rate base, “None Claimed” shall be stated following the average “Total Qualified” circulation claim for the period covered by the report (See 1-3 410). In those countries where advertising space is not sold using rate base, no reference to “rate base” shall be required in the BPA report.

1-3 251 Statement of Content Platform

The Statement of Content Platform discloses the form or combination of forms of digital magazines/editions included in the qualified circulation. These are defined in the statement according to the appropriate definitions and descriptions that include: Dynamic, Targeted, Replica Plus, Editorial Replica, or Enhanced.

Media owners have the option to report digital magazines/editions by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

1-3 252 Supplementary Question

A supplementary question is defined as a question eliciting any data regarding respondents’ purchasing authority and/or multiple response categories.

1-3 253 NON-QUALIFIED CIRCULATION

1-3 254 Non-Qualified Circulation - Defined

That circulation which fails to conform to the terms of the Market Served statement on the front page of the brand report and the audit report.

This distribution is reported on the back page of the brand report as “Average Non-Qualified Circulation” and includes the following:

Advertiser and Agency Copies, Rotated or Occasional Copies, Copies for Conventions and Trade Shows (unless claimed as Qualified Circulation), and All Other copies printed, with the exception of Single-Copy Sales returns.

Non-Qualified Circulation shall be reported as an aggregate figure, or, at the option of the media owner, these categories may be reported separately.

Non-qualified copies distributed by the media owner's salespeople to prospects are reported within the explanatory paragraph, Additional Data of the brand report as Advertiser and Agency Copies.

Non-qualified copies distributed at trade shows or conventions may be reported as Allocated for Trade Shows and Conventions if adequate distribution documentation is available for audit. Otherwise, these copies are reported as All Other.

Digital non-qualified advertiser and advertiser agency copies and non-qualified paid digital copies (excluding sponsored) may be reported on the BPA Worldwide brand reports, and audit reports.

1-3 255 Advertiser and Agency Copies

Includes checking copies and prospective advertising copies and shall be reported as non-qualified distribution in the explanatory paragraph, Additional Data.

1-3 256 Samples

Non-qualified copies distributed by the media owner's salespeople to prospects. They are reported within the explanatory paragraph, Additional Data of the brand report.

Any unsold or returned copies intended for single copy sale are not to be included in average non-qualified circulation. (See 1-3 253)

1-3 300 BRAND REPORT— GENERAL INFORMATION

1-3 301 TYPES OF BRAND REPORTS:

(a) Initial Audit Report

May be released for any consecutive three or six-month period. A magazine shall transfer to the standard six-month reporting periods ended June or December with its first brand report following the initial audit and include whatever issues were previously audited during the period reported (See 1-3 305 and 1-3 306).

(b) Interim Brand Report

The brand report covering the circulation for the first six months of the audit year, which may end with either June or December (See 1-3 306).

(c) Analyzed Brand Report

The brand report which covers the circulation of the second six-month half of the audit year which may end with either June or December (See 1-3 306).

(d) **Audit Report**

An annual report released by the corporation consolidating the interim and second six months brand reports (See 1-3 306). The audit report attests to the accuracy and validity of the media owner's circulation claims in the brand report.

1-3 302 Statements and Rights of Corporation

Media owner members shall report their circulation on forms supplied by the Corporation.

The filing of the media owner's circulation data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, circulation data and other data, in any form and manner authorized by the Board of Directors.

1-3 303 Typographical Setup

In the interests of uniformity in appearance and typographical setup of the BPA Worldwide Consumer Magazine brand reports and audit reports, BPA Worldwide will process all paragraphs which require special typesetting, ruling and extra pages. Where additional costs are incurred in setting up special paragraphs the magazine member shall be billed those costs.

1-3 304 Report Processing Fees

Time required to process a brand report or audit report shall be charged for at a uniform flat rate to be set from time to time by the Board of Directors.

1-3 305 Report Filing Period – Applicants

Media Owner Applicant - An applicant shall file a three or six month brand report as the basis for the initial audit for the consecutive three or six month period specified by the CEO of BPA during which qualified circulation has been practiced. Upon completion of the audit and approval by a majority of the Board of Directors, the media owner will be admitted to membership and the report shall be released as an initial audit report to Standard Rate and Data Service (SRDS) or Canadian Rates and Data (CARD), and/ or British Rates and Data (BRAD) or other similar services and BPA Worldwide members.

1-3 306 Report Filing Period – Members

Media Owner Members - With the exception of magazines issued annually and semi-annually, BPA Worldwide Consumer Magazine Audit Members will release two Brand Reports each year for the six months ended June and for the six months ended December, or for six months ending March and the six months ending September (Canada only). These two six month reports will be covered by one twelve-month annual audit report.

The six-month reports will be checked and released as Brand Reports upon receipt and completion of processing. The twelve-month brand report forms the basis for the annual audit report. The audit will be completed after the auditor's examination of the media owner's records. The audit period covered shall be no more than twelve months subsequent to the previous audit report.

A magazine issued annually or semi-annually, or has a publishing schedule that publishes one issue in a six-month reporting period, shall file one twelve month brand report, which will be checked upon receipt and, at the option of the media owner, printed and released by BPA Worldwide upon completion of processing. It shall be the basis for the twelve-month audit report. The audit will be completed after the auditor's examination of the circulation records.

The audit will be made in the media owner's office and/or wherever the records may be properly checked.

A magazine applicant which has chosen a period ended with a month other than June or December for its initial audit report, shall transfer to the standard June or December schedule with its first Brand Report following the initial audit report and include whatever previously audited issues are necessary to complete the six month period.

Consumer magazines in the United Kingdom may opt to report one annual Brand Report for the twelve months ending December.

1-3 307 Report Filing Dates - Members

Reports as outlined in the preceding sections shall be filed with the Corporation within 15 days after the period which they cover. Magazine members reporting 50% or more average qualified paid circulation in paragraph 1 shall be granted a 15 day extension to this date.

No member shall be granted an extension of time to file except with the consent of the CEO of BPA, who shall not grant an extension greater than 30 days for magazines reporting less than 50% average qualified paid circulation in paragraph 1 or 45 days for magazines reporting 50% or more average qualified paid circulation in paragraph 1 without a showing that the filing delay is a result of extenuating circumstances clearly beyond the magazine member's control.

Failure to file a report on or before the due date or the end date of an authorized extension, shall result in a suspension of services to the magazine member and will subject the magazine member to disciplinary action as outlined in Section B9.0 of the Bylaws.

At any time after the end date of an authorized extension, if the required report has not been filed, BPA Worldwide shall post an advisory to the BPA Worldwide website notifying the membership of the magazine's failure to file. All costs incurred in creating and posting an advisory, if any, shall be paid for by the subject magazine member.

No later than 60 days after the close of each reporting period, the web site, www.bpaww.com, will display the status of production for each report that has not been posted to the web site. For example, status reports for brand reports with the period ended June will be posted September 1st. These status reports will only include standard terminology approved by the Board of Directors.

The previous period's report would be moved to "history" at this time.

When a report is received by BPA Worldwide 1 – 14 days after the stated due date and a proof copy created, the media owner shall advise BPA of the acceptance of the proof copy within 10 business days after the proof copy has been issued. Reports received 15+ days after the stated due date shall have 5 business days to accept the proof. However, for media owners filing reports prior to the stated due date and receiving a proof copy before the stated due date, the counting of business days for the acceptance process shall commence with the filing due date and not from the date the proof copy was created. For all others, final approval shall be received within 20 business days of receipt of the first proof. The CEO of BPA shall not grant an extension without a showing that the delay in approving the proof copy is a result of extenuating circumstances clearly beyond the publication member's control.

Failure to advise BPA of the acceptance of the proof copy by this date shall result in suspension of services to the magazine member and will subject the magazine member to disciplinary action as outlined in Section B9.0 of the Bylaws. BPA Worldwide shall post an advisory on its website, notifying the membership of the magazine's failure to approve the proof copy. All costs incurred in creating and posting an advisory to the website, if any, shall be paid for by the subject magazine member.

All signatures on reports submitted to the Corporation shall be over the individual's typewritten name and title.

1-3 308 SRDS, CARD, BRAD or other Advertising Rates / Informational Listing Services

The media owner has the option of submitting the special SRDS or CARD or BRAD or similar form supplied by BPA Worldwide and an additional copy of their six-month brand report. When the report has been processed, typeset and approved for printing by the media owner, the SRDS or CARD and/or BRAD or similar form will be forwarded by BPA Worldwide to Standard Rate and Data Service or Canadian Rates and Data and/or British Rates and Data or similar company for inclusion in its next issue. The additional report which has been approved by BPA Worldwide will be returned to the media owner in advance of their printed copies for their use in preparing promotional material.

1-3 309 Report Purchase Options

Printed copies of brand report and audit reports may be purchased by a member of the Corporation at a price established by the Board of Directors.

1-3 310 Subject Matter of Reports

All language and terminology shall be factual and auditable.

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards.

In the event of a disagreement with a decision of the CEO of BPA, a media owner member may request a hearing before an appropriate committee of the Board of Directors.

1-3 400 BRAND REPORT– CONTENTS

See Standards section 1-3 300 for all general information regarding report types, filing dates etc.

1-3 401 General Overview

Media owners who wish to report any variety of BPA Worldwide audited magazines (with print and digital circulation), web traffic data, event attendance data, email newsletter data, RSS feed data, mobile data, webinar attendance, white paper downloads, social media and other media channels shall do so in BPA Worldwide's Brand Report format (See Brand standard 1-1 201).

All language and terminology shall be factual and auditable. A member may not claim or imply that BPA Worldwide audits:

readership or intent to read;

recipient's buying authority or influence (See 1-3 403).

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards. In the event of a disagreement with a decision of the CEO of BPA, a media owner member may request a hearing before an appropriate committee of the Board of Directors.

All media owners are required to report their average qualified non-paid circulation and average qualified paid circulation separately in paragraph 1 of their brand report and audit report.

All media owners shall report their total qualified circulation in paragraphs 2, 3, and 5 and their qualified non-paid circulation in paragraph 4 of the brand report. The reporting of qualified paid circulation in paragraph 4 is optional.

Media owners may report their qualified paid and non-paid circulation separately in paragraphs 2 through 6; however, reporting paid circulation in paragraph 4 of the brand report is optional.

1-3 402 Name of Magazine

The first page of the report shall contain the name of the magazine; publishing company; principal telephone number; fax number; email address; Web site URL; address of publishing company; whether or not an official membership benefit magazine; and the year of magazine's establishment.

A media owner member shall notify BPA Worldwide of any change in the name of their magazine. At this time the media owner shall declare whether or not they wish to change the date the magazine was established.

Any change in the date of establishment should be consistent with the volume number appearing in the masthead of the magazine. If the date of establishment and volume numbers are changed, the magazine will be considered a new magazine and subject to the standards requiring application for membership.

Whenever two or more magazines are merged, the following comment shall appear in the upper left hand corner of two consecutive brand reports and one audit report:

Merged Magazine –See the explanatory paragraph, Additional Data.

The explanatory paragraph, Additional Data, shall report the date of merger and other applicable information.

1-3 403 Market Served

Market Served shall contain a factual statement by the media owner of the Market Served. The statement shall describe in auditable terms the standards or qualifications employed by the media owner in determining who will receive the magazine. Whatever the qualification standards may be, they shall be reported in classification breakouts in paragraph 3 of the report. Only recipients who conform to these standards shall be included in the qualified circulation.

A regional magazine shall include a description of the geographical area in the Market Served, if this information is not apparent in the title of the magazine.

Market Served and Method of Distribution may NOT contain any reference to:

- Requests to receive the magazine

- Recipient's reading or intent to read the magazine

- Recipient's buying authority or influence, unless 100% of the recipients have this authority or influence and such is supported by auditable documentary evidence. Questionnaire forms used to elicit buying authority or influence shall be submitted to BPA Worldwide for approval.

- Any claim that all people of a certain category receive the magazine

- Function, unless supported by auditable documentary evidence

- A classification that is not reported in Paragraph 3 of the report

- Readership or intent to read

1-3 404 Summary of Circulation

The Summary Section may be provided on the front of the brand report and audit report.

It shall include summary tables of:

- Average Qualified Circulation

- Price and Frequency and charts of:

- Five-Year Average Qualified Circulation Trend (Optional)

- Five Year Average Annualized Subscription Price (Optional)

(a) The Average Qualified Circulation summary table shall list:

- Average Total Qualified (based on [number] of issues during period),

- Average Rate Base,

- Variance figure expressed as copies above or below the average rate base and as a percent,

- Qualified circulation separated by Qualified Paid and Qualified Non-Paid, and the former further separating Subscriptions, Sponsored, Bartered and Single Copy Sales.

(b) The Price and Frequency summary table shall list the:

“Average Annual Subscription Order Price for the Period Reported (Excluding Sponsored Subscriptions)”.

If sponsored orders represent 5% or more, but less than 10% of all orders for the period, the “Sponsored Average Annual Order Price” shall be footnoted in the explanatory paragraph, Additional Data.

If sponsored orders represent 10% or more of all orders for the period, the “Average Annual Sponsored Order Price for the Period” shall also be reported separately in the explanatory paragraph and the Price and Frequency table (See 1-3 412).

Magazines with 50,000 or less Average Total Qualified circulation and less than 5% average qualified paid circulation (excluding single copy sales) in paragraph 1, are not required to report average subscription order price. Magazines with more than 50,000 average qualified circulation in paragraph 1, have the same reporting option when the average qualified paid circulation (excluding single copy sales) is less than 2%.

Issues Per Year.

All Single Copy Sale Prices for the Period.

Comic books, reporting multiple editions, may report Average Annual Subscription Price for the period at their option.

(c) The Five Year Average Qualified Circulation Trend bar chart shall include:

Qualified Paid Single Copy Sales
Qualified Paid Subscriptions
Qualified Non-Paid Subscriptions, and
Rate Base line

The Five Year Average Annualized Subscription Price line chart shall report average annual price over five years.

1-3 405 Paragraph 1: Average Qualified Circulation Break-Out for Period

All copies listed in this section must be directed to subscribers or recipients as stated in the Market Served. This paragraph will report: Individual; Membership Benefit; Multi-Copy Same Addressee; Sponsored Individually Addressed; Sponsored Multi-Copy Same Addressee; a subtotal for Subscriptions and Single-Copy Sales; Sponsored Single-Copy Sales, and a total that is the sum of the numbers shown for all of the break-out lines (not including the Subscriptions/Single-Copy subtotal line).

Separate columns will list qualified paid, qualified non-paid, qualified service, qualified total qualified circulation (See 1-3 201).

For magazines reporting digital versions, separate paragraph 1's shall be included for individuals subscribing to the print version, individuals subscribing to the digital version, and, if applicable, individuals receiving both the print and digital versions, in the explanatory paragraph, Additional Data. Total Qualified circulation shall be the unduplicated count, and shall be reported on page one (See 1-3 244).

1-3 406 Paragraph 2: Qualified Circulation by Issues for Period

Shall report the Total Qualified Circulation, and separately report Qualified Paid and Qualified Non-Paid for each issue. The paid shall be further reported as Single-Copy Sales and Subscriptions.

Shall report gross print and gross digital circulation separately, along with the Total Qualified circulation consisting of unduplicated unique recipients for each issue.

Total copies distributed (print and digital) must be equal to, or exceed the sum of total qualified circulation, advertiser/agency circulation, non-qualified paid/request circulation and rotated/occasional circulation, for each issue.

(a) Late Mailing/Distribution

If 15% or more of the total copies distributed for an issue reported in Paragraph 2 are distributed on or after the stated distribution date or placed on sale date, whichever comes first, of the next issue, the completion date of distribution for that issue shall be reported in the explanatory paragraph, Additional Data.

In the absence of a stated distribution date for a magazine on either its rate card or in Standard Rate & Data Service, British Rates and Data, or Canadian Rates and Data, or similar magazine, the cover date shall be used to determine if copies of the magazine are distributed late, e.g.,

Monthlies: Copies would be late if distributed on or after the first day of the next issue (a January issue would be late if mailed on or after February 1st).

Bimonthly: Copies would be late if distributed on or after the first day of the next issue (a January/ February issue would be late if mailed on or after March 1st).

Semi-Monthly: Copies would be late if distributed on or after the first day of the next issue (a January 1st issue would be late if mailed on or after January 15th).

Weeklies: Copies would be late if distributed on or after the first day of the next issue (a January 1st issue would be late if mailed on or after January 8th).

The explanatory paragraph, Additional Data, shall report the percentage and number of copies which are distributed late.

When magazines report separate editions in paragraph 2, this standard shall be applied separately to each edition.

If the magazine serves special issues (See 1-3 104), the special issue reported in paragraph 2 shall distribute before the stated distribution date of the next regular issue. In the absence of a stated date of distribution, the special issue shall distribute prior to the actual distribution date of the next regular issue.

1-3 407 Paragraph 3: Breakout of Qualified Circulation to Consumer Markets

The analysis shall be of any issue reported in a six-month period.

Circulation for the issue analyzed shall be compared separately with the average of the other issues reported in the report to reveal how typical the issue is, as compared with all the others. 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.

Whatever the qualification standards may be, they shall be reported in classification breakouts in paragraph 3 of the report. Only recipients who conform to these standards shall be included in the qualified circulation.

Paragraph 3 shall contain a breakout of a specific issue by one or more following types of classifications either as separate totals or in a cross-tabulation:

Markets
Population Groupings
Specialized interest of recipients

Magazine members electing to analyze their circulation by the recipient's job functions shall obtain approval of the CEO of BPA to ensure that acceptable qualification proof is available for a functional analysis.

Magazine members reporting print and digital versions shall report such circulation in the following columns:

- Total qualified Circulation
- % of Total Qualified Circulation
- Print Version (Optional)
- Digital Version (Optional)

The classifications for such subscribers shall be based upon the most recent qualification source for each piece of demographic information used to qualify subscribers of the print and digital versions. (See 1-3 244)

If the media owner elects to report print and digital versions, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

Single-Copy Sales shall be reported separately and further broken down into:

- Single
- Sponsored
- Non-Returnable
- Digital Version

Reporting Multi-Copy Retail Sales shall have an accompanying explanatory footnote.

An analysis of single copy sales by type of outlet, such as newsstand or retail outlets, may be provided at the media owner's option. If this option is exercised, the same analysis on an issue-by-issue basis may be provided in the explanatory paragraph, Additional Data.

The quantity of Single Copy Sales sold to consumers with a promotional incentive (cover mount) shall be reported in the explanatory paragraph, Additional Data (See 1-3 224).

The reporting of Multi-Copy Same Addressee and Sponsored Multi-Copy Same Addressee subscriptions shall include an accompanying explanatory footnote (See 1-3 248 and 1-3 246b).

Qualified copies distributed to trade shows, consumer shows and conventions shall be identified separately within paragraph 3, with a cross reference to the explanatory paragraph, Additional Data that includes general information regarding the nature of the show(s). Individual shows and copy quantities per show may be disclosed at the media owner's option.

Magazine members reporting Barter, Sponsored Individually Addressed, Sponsored Multi-Copy Same Addressee, and Sponsored Single-Copy Sales circulation in paragraph 1 of brand reports and audit reports shall report each type of circulation separately in paragraph 3 of these reports.

Magazine members shall state, in auditable terms, the type of business or market category of the sponsor/purchaser and the specific nature/characteristics of the recipients of these Sponsored magazine copies (e.g., "Sponsored Individually Addressed: A manufacturer of sporting goods Sponsored copies for physical educators and sports coaches").

Agents shall not be sponsors of subscriptions or single copies.

Magazine members may aggregate sponsors/purchasers that are of the same type of business or market category (e.g., "Sponsored Individually Addressed: Five manufacturers of sporting goods Sponsored copies for physical educators and sports coaches").

If copies are requested by the end recipient, the magazine member may disclose this (e.g., "Sponsored Individually Addressed: Copies requested by online catalog shoppers, Sponsored by an online catalog retailer").

Reporting of the actual name of the sponsor/purchaser is optional.

Auditable documentary evidence shall be available to support the conformance to the magazine member claim. The terms of qualification of the recipient shall also be stated in Market Served.

Classifications which are reported with subtotals will be arranged in paragraph 3 with the total reported beneath the subtotal in such a way that no confusion can occur about the exact number of copies being reported. The BPA Worldwide staff shall arrange this breakout in accordance with this instruction.

A magazine member may elect to cross-tabulate paragraph 3 by any paragraph reported on the BPA brand report providing the data reported for such paragraphs are based on actual counts of the analyzed issue.

Magazines serving essentially the same market should endeavor to agree upon a mutually acceptable and reasonably uniform schedule of classifications to be employed in paragraph 3. However, no media owner member shall be required, as a condition of membership, to accept a particular method or schedule of classifications employed by other magazines for the same market served.

1-3 408 Paragraph 4: Qualified Source and Age Breakout

Shall contain an analysis (count and percentage) of the qualified non-paid circulation (and at the option of the media owner may contain an analysis of all qualified paid circulation) by sources using one, two, and three-year columns.

If, at the option of the media owner, paid circulation is reported and subscriptions sold for greater than three years have aged beyond three years, that circulation may be reported in a "three+ years" column. Only paid circulation for greater than a three year term may be reported in excess of three years. A note shall be included in the explanatory paragraph, Additional Data, stating the number of paid circulation aged beyond three years.

Non-paid circulation may not be aged beyond three years.

The issue analyzed shall be the same one as analyzed in paragraphs 3 and 5 except for the interim brand report where the qualification figures for circulation may be obtained by representing the percentages for circulation from the latest audit report.

In reporting qualification, figures submitted by the media owner covering the number of recipients qualified from each source shall be determined by an actual count of the entire list for the issue analyzed. This count may be obtained from either a master card file or from a label printout.

For those media owners exercising their option not to report qualified paid circulation by source using one, two, and three-year columns, the following explanatory paragraph, Additional Data footnote shall be included:

"Paragraph 4 includes (number) qualified non-paid circulation. Qualified paid circulation of (number) combined with the qualified non-paid circulation equals (sum of numbers) total qualified circulation for the analyzed issue."

Also, whenever qualified paid circulation is deleted, the heading for paragraph 4 shall indicate that only qualified non-paid circulation is reported and the percentages reported shall be of only the non-paid circulation.

A newly admitted media owner member may elect to defer reporting the number of recipients qualified from each source until the second audit. If they so elect, paragraph 4 of the initial audit report shall contain a statement describing the source of names on the qualified list and provisions made for keeping the list current. The number of names obtained from each source shall not be reported. This statement shall be preceded by the following:

"Since this is an initial audit report, figures for this paragraph are not required. In lieu thereof, the media owner makes the following statement concerning the source of names on their qualified circulation list."

The initial reporting of Qualified Circulation figures for paragraph 4 shall be in an audit report. Thereafter, new figures for paragraph 4 are required at least annually, concurrent with the end of the magazine's audit year.

The new data for paragraph 4 shall appear in the second brand report and in the twelve-month audit report. On the interim brand report, qualification figures for paragraph 4 for circulation may be obtained by repeating the percentages for circulation from the latest audit report and applying them to the Qualified Circulation for the issue analyzed for the interim report, to arrive at the total copies for each source.

This option is available only 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 audit report. If the total qualified circulation for the issue analyzed in the interim brand report has increased by 10% or more due to a merger of magazines during the reporting period, the media owner may elect to report actual figures for the interim brand report or omit the paragraph for the interim brand report. If the media owner chooses to omit the paragraph the following footnote is required:

“Due to a merging of magazines during the reporting period paragraph 4 cannot be projected and has not been reported. Paragraph 4 will be reported in the subsequent brand report.”

If a publication conducts a special six-month audit to change the audit year-end period (cycle), interim circulation data may only be projected from a printed/posted audit report.

A media owner may report new figures in paragraph 4 in the interim brand report if new figures are obtained from a label printout count, which shall be subject to audit.

Magazines reporting qualified circulation shall note the number of copies and their sources in the explanatory paragraph, Additional Data. At the media owner's option, a combined summary table may be provided. The percentages in each table should add to 100%.

Magazines reporting print and digital versions shall report such circulation in the following columns:

Total Qualified Circulation
% of Total Qualified Circulation
Print Version (optional)
Digital Version (optional)

If non-requested digital circulation is reported, print and digital circulation shall be reported separately throughout the paragraph.

If the media owner elects to report print and digital versions, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

The following schedule of sources of qualification shall be listed in Source and Age paragraph 4:

- I. Direct Request
- II. Request From Recipient's Company
- III. Membership benefit
- IV. Communication From Recipient or Redistributors (other than request)
- V. Total Sources other than above including rosters and directories, manufacturer, distributor, and wholesaler lists, other source.
- VI. Single Copy Sales

Media owners may report written, telecommunication, and electronic request at their option. Media owners may report expanded breakouts of association rosters and directories, manufacturer's, distributor's and wholesaler's lists separately, at their option.

When reporting qualification sources II and IV, the media owner may factually state, in the explanatory paragraph, Additional Data, in auditable terms who actually requested the magazine or from whom a communication was received.

The media owner shall insert opposite each source the number of recipients for each source.

The source material shall be identified in a footnote in the explanatory paragraph, Additional Data, whenever 10% or more of the circulation is qualified through any one of the following:

- a single business directory;
- a single association roster or directory;
- other sources.

Mailing house lists which have been approved by BPA Worldwide may be reported as other sources, and shall carry an identifying footnote (See 1-3 531).

Magazine members may elect to report a breakout of their qualified United States and international circulation by source and qualification time period in paragraph 4.

1-3 409 Paragraph 5: Geographical Break-Out of Qualified Circulation

The issue analyzed shall be the same one as analyzed in paragraph 3.

Paragraph 5 shall contain an analysis (counts and percentages) of the Qualified Circulation by geographic region. Digital magazine subscribers who do not provide a land address shall be reported as "email address only."

Circulation, including Single-Copy Sales and Subscriptions, shall be analyzed separately. Multi-Copy Same Addressee subscriptions, if any, shall be included in the appropriate state or other geographic area. The issue analyzed shall be the same one as analyzed in paragraph 3.

If a publisher is reporting estimated single copies sales for an analyzed issue, they may choose to report the estimated sales by each state/province, or as one figure in the geographic table.

The analysis provided by magazine members shall contain classification headings for Paid and Non-Paid.

Magazine members reporting Sponsored Individually Addressed; Sponsored Multi-Copy Same Addressee; Public Place; or Sponsored Single-Copy Sales circulation in paragraph 1 of brand reports and audit reports may, at their option, break out such circulation by geographical area served.

- (a) For circulation in the United States, paragraph 5 will report the following regional breakout which is consistent with that of the U.S. Bureau of Census:

New England	East South Central
Middle Atlantic	West South Central
East North Central	Mountain
West North Central	Pacific
South Atlantic	

In addition, U.S. Territories, Canada, Mexico, other International, APO and/or FPO addressed copies shall be reported.

Media owners may report circulation by state and three digit zip code prefixes or countries, at their option.

An optional breakout of the U.S. population may be provided with an index reporting the quotient of the percentage of circulation divided by the percentage of population for that geographic area. The source of the U.S. population data shall be footnoted.

- (b) For circulation in Canada, paragraph 5 will report the following breakout:

Newfoundland	Ontario
Prince Edward Island	Manitoba
Nova Scotia	Saskatchewan
New Brunswick	Albert, N.W.T. and Nunavut
Quebec	B.C. and Yukon

- (c) For circulation in the United Kingdom, it is sufficient to solely report “United Kingdom” in paragraph 5.

Media owners may elect to report circulation in the United Kingdom by region using the following breakout:

Northern	Scotland
Yorkshire & Humberside	Wales
North West	East Anglia
East Midlands	Greater London
West Midlands	South East
Northern Ireland	South West

Magazine members reporting circulation within the United Kingdom may elect to do so by county within region, using the BPA Worldwide standardized breakout (available on BPA’s website).

- (d) Circulation for China, paragraph 5, will report the following regional breakout which is consistent with the People’s Republic of China Administrative Standard Regions:

Northeast	East China
North China	Central South
Northwest	Southwest
Other	

Publication members reporting circulation within the People’s Republic of China must report by province/city using the BPA Worldwide standardized breakout (available on BPA’s website).

Magazine members reporting international circulation by region and/or country may elect to do so using the BPA Worldwide standardized international geographic breakout (available on BPA’s website).

- (e) International circulation will report the following regional breakout:

Asia	Caribbean
MENA (Middle East North Africa)	Central America
Europe	South America
Africa	Asia Pacific
North America	

Regions representing 0-4.9% circulation may report circulation by continent. Regions with 5.0% - 24.9% circulation shall report circulation by country. Standard country breakouts are available for each region. Countries with 25%+ circulation shall report circulation by state/province or other agreed upon market geographic breakdown within any one country, using standard BPA Worldwide tables (Canada, China, United Arab Emirates, United Kingdom, and the United States, available on BPA's website).

Where BPA Worldwide has not published a standard table and a publication has over 25% of its circulation to any one country, and the market would benefit from a standard table, BPA Worldwide will work with the media owners in the market to establish a standard table.

Publication members reporting qualified circulation for digital magazines may report digital, print and total qualified (unique recipients) classification headings. The column representing unique recipients shall be an unduplicated count.

Magazine members reporting U.S. circulation and electing to add to paragraph 5 of their brand reports a further breakout by Standard Metropolitan Statistical Areas (SMSA) shall abide by the following special standard:

Only wording appearing in the current SMSA government manuals and reports may be used for area codes and area titles. Media owner members reporting by SMSA shall use the most recent government manuals and supplements. Copies of the SMSA manuals may be purchased from the Geography Division, Bureau of Census, Social and Economic Statistics Administration, U.S. Department of Commerce, Washington, D.C. 20233.

All qualified circulation which is applicable shall be reported by Standard Metropolitan Statistical Areas (SMSA). Copies not included in the SMSA analysis shall be reported separately and shall be included in the total qualified circulation for the issue analyzed.

Magazine members may display, in either paragraph 5 or the explanatory paragraph, Additional Data, an analysis of U.S. qualified circulation by ABCD county size.

Magazine members who distribute to a specific geographically defined area may have the option of including a map to graphically display their circulation distribution.

1-3 410 Paragraph 6: Three Year Average Annual Qualified Circulation

Shall report the total audited average qualified circulation for a six month circulation intervals for the previous two years and the current unaudited brand report (s).

The data shall include a reporting of the Total Audited Average Qualified circulation, Qualified Paid circulation, Total Qualified Non-Paid circulation. Qualified Digital version and Qualified Print version circulation may be reported at media owner's option and if reported shall report gross print and gross digital circulation separately, along with the total qualified circulation consisting of unduplicated unique recipients for each issue.

The average percent of post expiration copies for the issues shown in paragraph 2, and average annualized subscription price (inclusive of premium value) shall be reported.

Magazines with 50,000 or less average total qualified circulation and less than 5% average qualified paid circulation in paragraph 1, are not required to report arrears (post expire copies), or average order price.

Magazines with more than 50,000 average qualified circulation in paragraph 1, have the same reporting option when the average qualified paid circulation is less than 2%.

Also reported shall be the stated rate base, if any, a comparison between the audited average qualified circulation and the rate base. If no rate base is stated, "None Claimed" shall be used in lieu of the rate base.

Calculations for percentage of post expiration copies (arrears) shall be made based on the average number of copies served in arrears during the period divided by the average total qualified circulation for the same period as reported in paragraph 1.

The first mandatory reporting of this data shall be with the initial audit. With each successive year, new data will be added until three years of data is displayed.

1-3 411 Total New and Renewed Qualified Paid Subscriptions Ordered/Sold for the Period

If reported, shall be reported on the last page of the brand report and report the gross total number and percentages of new and renewed qualified paid subscriptions ordered/sold during the period covered; this includes gross subscription sales/orders with unpaid invoices pending. Gross subscription sales as reported in these paragraphs shall be based on only the circulation.

1-3 412 Paragraph for Prices

If reported, shall report the "Average Annual Order Price" excluding sponsored orders. (See 1-3 404b for guidance)

Average price shall be calculated by totaling the gross dollar value of all orders received during the reporting period (inclusive of promotional incentives but exclusive of all sponsorship orders, whether Individual, Multi-Copy or Public Place), and dividing this total by the gross total number of copies ordered (exclusive of all Sponsorship orders, whether Individual, Multi-Copy or Public Place). The resulting average unit price is then multiplied by the basic annual term, to yield the average subscription price for the period.

If sponsored orders represent 5% or more, but less than 10% of all orders for the period, the "Sponsored Average Annual Order Price" shall be reported in the explanatory paragraph, Additional Data.

If sponsored orders represent 10% or more of all orders for the period, the average annual order price for the period for sponsored copies shall be reported separately as "Sponsored Average Annual Order Price: \$x.xx (currency symbol and value)." on page 1, and reported in the explanatory paragraph, Additional Data.

Average sponsored order price shall be calculated by totaling the gross dollar value of all sponsored orders received during the reporting period (inclusive of Multi-Copy or Public Place), and dividing this total by the gross total number of sponsored copies ordered. The resulting average unit price is then multiplied by the basic annual term, to yield the average sponsored order price for the period.

When multiple currencies are collected, the media owner shall convert the multiple currencies into one home currency of choice in order to compute Average Annual Order Price.

(For determining average annual price for Combination Sales (See 1-3 212).

If prices paragraph is reported it shall separately report the gross number of Qualified Paid subscriptions sold during the period by prices and terms, in sequence of descending percentage of orders sold that are yielded from offers representing 5% or more of subscription sales for the period (except for "All Others," which shall always be reported last). Sponsored orders are not required to be itemized by price and term.

The total Sponsored orders received during the period (including Multi-Copy and paid Public Place) shall be reported as a one-line figure which, when added to the reporting of all other orders, shall yield the grand total orders received for the period.

If paid copies under "All Others" represent 20% or more of the orders for the period, the average price of "All Other" orders shall also be reported.

Subscriptions sold on a renew until forbid basis with no fixed term, which are billed periodically throughout the year, without any renewal notification, shall be reported separately as "Perpetual subscribers (see note)." The media owner shall disclose the rate and terms of the perpetual subscriptions.

1-3 413 Paragraph for Promotional Incentives

If reported, shall be reported on the last page of the brand report and report the number of gross new and renewed qualified paid subscriptions ordered/sold with promotional incentives during the period covered (See 1-3 224).

The following categories of Promotional Incentives shall be listed in Promotional Incentives Paragraph:

- Sold without promotional incentive
- Sold with editorial promotional incentive
- Sold with other promotional incentives

1-3 414 Renewal Percentage

Renewal Percentage of Qualified Circulation: Media owners may, at their option, report the renewal rate for the qualified paid circulation in the explanatory paragraph, Additional Data. The initial reporting of the renewal rate shall be in an audit report. If a magazine opts not to report this data, a renewal percentage table will not be displayed.

If reported, this paragraph shall state the number of qualified paid subscriptions expiring during the twelve months ended eight months prior to the end of the period covered by the report, the number of these expirations which were renewed, and the renewal percentage. A subscription shall be considered a renewal if it has been renewed within six months of its expiration date and paid for within six months following receipt of the renewal order.

The renewal rate, if reported, shall be shown separately for membership benefit subscriptions.

1-3 415 Average Non-Qualified Circulation

This distribution shall be reported as a total figure and includes the distribution for the period of the following:

- Advertiser and Agency Copies;
- Non-Qualified Paid;
- Copies for Conventions and Trade Shows, (if NOT reported as qualified);
- and all other copies printed with the exception of single copy sales returns.

At the option of the media owner, these categories may be reported separately.

If single copy sales are reported, the following comment must be included, "Average non-qualified circulation excludes single copy sale returns."

Digital non-qualified advertiser and advertiser agency copies may be reported in the non-qualified average on the BPA worldwide brand reports, and audit reports.

1-3 416 Additional Data / Explanatory Information and Notes

Shall contain any additional explanatory information necessary to supplement facts reported elsewhere in the report. Only data approved by the CEO of BPA shall be shown in this paragraph.

All required disclosures are delineated within each standard or appropriate section of the standards.

1-3 417 Media Owner's Affidavit

A brand report shall carry the media owner's affidavit containing two signatures. At least one of the two signatures shall be that of an officer of the publishing company or its authorized representative.

The names and titles of the persons signing the brand report shall be typewritten below their signatures. If you file electronically, the signed affidavit shall be faxed or mailed to BPA Worldwide.

1-3 418 Date Received

All brand reports will contain the date received by BPA Worldwide.

1-3 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-3 501 Records – Proof of Production and Distribution

Media owner members shall provide for the auditor's examination proof of mailing of every issue of the magazine for the period being audited. This proof shall be in the form of receipts from the Post Office, or other courier if the Post Office is not used.

These receipts may be in different forms due to postal regulation. Where multi-copy same addressee, or other international circulation is claimed, suitable proof of its mailing shall be available.

In addition, receipts for monies deposited with the Post Office shall be retained for the auditor's examination.

For Digital versions summary reports of alerts and distribution/downloads shall be provided to the auditor with corresponding logs (See 1-3 244).

A copy of each issue, cancelled checks, printer's bills, and paper consumption reports shall be available. The auditor may request access to any ledger accounts relative to circulation and such inspection shall be made with a representative of the magazine present.

1-3 502 Records – Qualified Sources

Proof of classification as reported in paragraph 3 shall be available for all recipients on the qualified circulation mailing list. This proof may be no older than three years from the date of the issue analyzed. If the classification in paragraph 3 contains data that cannot change – such as year of medical school graduation – the proof may be older than three years from the date of the issue analyzed.

All documents used in verifying the qualified circulation mailing list as the issue analyzed shall be available to the auditor.

Qualification evidence submitted by the media owner shall support all the mailing data on the label or printout. However, evidence supporting the street address or box number may be omitted whenever the postal service notifies the media owner of an address change.

Nothing in these standards shall be construed as requiring a media owner to include the name of a person or any other specific element on the labels or print-out, but whatever mailing data is present shall be supported by evidence, subject to the claim that the recipient is within the Market Served as described on the first page of the brand report or audit report, and has been correctly classified in paragraph 3.

In the event that the address and the qualification of a single recipient is supported by evidence from more than one source, the media owner may choose any one, but not more than one of those sources under which to classify the recipient in reporting in paragraph 4 of the brand report. However, when copies of a magazine are directed to specific individuals by name, the media owner shall report the sources from which the recipient's name was obtained.

1-3 503 Records – Paid Subscriptions

Original orders, dues invoices, membership application forms and proof of payment for all qualified paid subscriptions shall be available to the auditor as to price, term, expiration date, how ordered and use of promotional incentive, if any.

Media owners shall maintain on file, for use of the auditor, copies of all subscription offers and copies of all contracts/agreements made with solicitors, subscription agencies or any other parties through whom subscriptions are obtained for their magazines, as well as for handlers (national distributors and/or wholesalers and/or retailers) of single-copy sales. The auditor may request access to any ledger accounts relative to circulation, and such inspection shall be made with a representative of the magazine present.

Magazines shall code to denote on computer records and display on a resulting printout, price paid, demographic classification (if any), source and date of qualification, length for each subscription, how ordered, use of promotional incentive and subscription expiration date.

For magazines reporting their qualified paid circulation throughout their brand report, the media owner shall run tabulations separating counts of the qualified paid circulation and qualified non-paid circulation respectively.

Magazines reporting their qualified paid circulation throughout their brand report are required to maintain a daily, weekly, or monthly subscription register (the journal of original entry) or a system in lieu thereof which records the following information concerning each and every subscription received: (a) price paid, (b) date of payment, (c) length of subscription, (d) how ordered, (e) promotional incentives, if any, (f) multi-copy same addressee subscriptions, (g) membership benefit subscriptions.

1-3 504 Requirements for Storing Documents Digitally

Media owners electing to store documents digitally shall adhere to the following:

The stored qualification documents shall support the following information for each recipient:

Consumer Magazine classifications for paragraph 3.

Source and date of qualification documents for paragraph 4. The date of qualification for paragraph 4 shall be the date the recipient signed the document or the date of receipt stamped by the media owner. It is not necessary that the postmark cancellations be imaged.

Geographical breakout for paragraph 5.

All other demographic data captured for future use.

Completely legible hard copy shall be provided for the stored qualification documents selected on the auditor's test. At BPA Worldwide's discretion, periodic confirmations shall be made to verify the origin of the document.

1-3 505 Records - Single Copy Sales

Magazines reporting single copy sales in paragraph 1 shall maintain records to substantiate the claim.

A shipping manifest indicating destinations for breakout shipments and bulk shipping receipts for distribution of copies from the printer to the first point(s) of redistribution, either the distributor, wholesaler/ breakup agent, or outlet dealing directly with the media owner shall be maintained.

Media owners shall maintain accounts specific to each magazine title for any national distributor, wholesale vendor with whom they conduct single copy sales transactions.

All account entries shall be documented including invoices for the draw, covers or affidavits for returns, and adequate evidence of payments received and credits issued.

1-3 506 Records - Non-Qualified Sources

The following types of records shall NOT be acceptable as evidence of qualification:

Official Post Office change of address notification forms shall not constitute acceptable qualification proof unless they also provide proper qualifying information.

Any reports originating within the magazine's own organization or from the media owner's staff with the exception of telephone interviews which have been approved by BPA Worldwide and paid contracts for exhibit space for trade show copies.

1-3 507 Audit Methodology

The BPA Worldwide Consumer Magazine Audit methodology is based upon a perpetual inventory record by issue of the names on a circulation list. It is a media owner member's responsibility to insure the accurate maintenance of their circulation list and records in accordance with these Standards. The BPA Worldwide Consumer Magazine Audit is designed to verify and authenticate the media owner's circulation claims.

1-3 508 Delayed Audit – Suspension of Service

Services shall be suspended by the CEO of BPA for any magazine whose audit takes over 75 days to complete or such further time as granted by the CEO of BPA. The Media owner may appeal the CEO's decision in writing to the Executive Committee of the Board of Directors within seven days from receipt of the CEO's decision. The decision of the Executive Committee shall be final. In the event of suspension, a notice shall be posted on BPA's web site and/or released to the membership and the media owner may not publicize any circulation data until the successful completion of that audit.

1-3 509 Circulation List

A printout proof or electronic file of all names on the qualified circulation list for the issue analyzed shall be provided for the auditor. A physical count of the circulation list shall be made by geographical distribution, and by the classifications shown in paragraph 3 of the brand reports, (including the date the demographic data was obtained). The classification count (by types of classifications) shall be compiled by state or other geographical area unless otherwise provided for by the CEO of BPA. Suitable forms for the tabulation of these counts will be supplied by the Corporation.

A media owner reporting new qualification figures in paragraph 4 in their interim brand report shall provide the auditor with a physical count of the circulation list.

1-3 510 Requirements and Records for Computerized Audits

Media owner members using a computer for circulation fulfillment and preparation of audit data shall:

Provide a file of all qualified names on the qualified mailing list for the issue analyzed, including all of the coding information for each recipient, including notation for digital and print recipients.

Provide separate computer tabulations for:

Consumer magazine audit classifications for paragraph 3.

Source and age of qualification documents for paragraph 4.

Geographical breakout for paragraph 5.

Post expiration copies (arrearages) for paragraph 6.

Retain a "frozen" file (in any form of memory) of the issue analyzed until the annual audit has been completed. The auditor may conduct any tests to verify the accuracy of the above reports.

If a media owner member elects not to retain a "frozen" file for the issue analyzed, the necessary worksheets shall be completed as reported in 1-3 536 of these standards.

Allow the auditor to examine the computer procedure manuals, including the coding instructions and system flow charts.

1-3 511 Validation of the Circulation File

Upon completion of the circulation audit and annual validation of the mailing list, the media owner, with the written approval of the CEO of BPA, will be permitted to discard the qualification source documents which have been validated provided the mailing list proof of all the names on the qualified circulation list for the issue analyzed are coded to denote:

Consumer audit classifications for paragraph 3.

Source of qualification and original date of qualification documents for paragraph 4.

Length and expiration date of each paid subscription.

It shall be the media owner member's responsibility to insure the proper safeguards for the protection and retention of the validated mailing lists which have been sealed by the auditor for the exclusive use of BPA Worldwide in subsequent audits.

Any qualification source documents received by the media owner after the validated audit issue shall be retained for the auditor's examination at the time of the next regular circulation audit.

A magazine member may request a validation audit of its circulation list if the magazine's records are to be relocated in another city or state, or if the magazine has been sold.

If the CEO of BPA determines that the validation audit should be made, the media owner shall be billed in accordance with the standard circulation audit charges and any and all other costs which may be incurred by the corporation in conducting such audits.

All records necessary for an audit shall be retained by the media owner until the next annual audit has been completed.

1-3 512 Qualification Sources

Several types of records shall be acceptable evidence of qualification include:

1-3 513 Request Circulation

1-3 514 Direct Request: Written

- (a) Letters from individually qualified recipients requesting the magazine may be reported as request circulation.
- (b) For those media owners electing to use a standardized questionnaire to develop request circulation, including those transmitted electronically a question approximating the following shall be asked on the form:

"Do you wish to receive (continue to receive) this magazine? Yes ... No" Non-paid questionnaires shall be restricted to a specific time period only if the actual or specific period of time is indicated as part of the question: "Do you wish to receive (continue to receive) this magazine for 10 months? Yes ... No"

- (c) Media owners may utilize, as an option, an alternate question approximating the following:

"Please sign here if you wish to receive (continue to receive) this magazine." Forms utilizing this alternate shall be signed to be reported as personal written request circulation.

- (d) Multiple magazine written request circulation forms or letters are acceptable and may be counted as written request circulation provided the following requirements are met:

The magazines offered shall be homogeneous in that they have similar terms of qualification and serve markets, special interest groups, businesses, industries, trades, occupations or professions with clearly defined limits.

A separate signature, initial, or selection indicator (media owner's option) from the subscriber is necessary to establish a request for each publication.

The questionnaire must be signed.

The text of the solicitation shall disclose that multiple magazines are being offered.

A description of the editorial content which differentiates the magazines offered shall be included on the qualification card. The offer form shall display the different magazine logos to increase differentiation amongst titles. If a publication offered is published in a language different than the language used in the solicitation, this shall be noted on the qualification form.

A question approximating the following shall be asked on the form:

SIGN, INITIAL, OR CHECK HERE IF YOU WISH TO RECEIVE
PUBLICATION XXX

SIGN, INITIAL, OR CHECK HERE IF YOU WISH TO RECEIVE
PUBLICATION YYY

SIGN, INITIAL, OR CHECK HERE IF YOU WISH TO RECEIVE
PUBLICATION ZZZ

Signature

Date

- (e) BPA Worldwide's approval will be given to any questionnaire that is consistent with the Market Served and the classifications reported in paragraph 3 of the brand report.
- (f) Whenever a questionnaire is used, recipients who indicate they do not wish to receive the magazine shall be removed from the qualified circulation list within 90 days of receipt of the communication.
- (g) Qualification forms that are entitled or indicated as "new subscription forms" shall be counted as request circulation. These forms need not contain the question asking the recipient if they wish to receive the magazine.

- (h) Reader service cards may be counted as request circulation if the recipient has signed the card and answered the question "Yes, I wish to receive (continue to receive) this magazine" (See 1-3 524).
- (i) An address change may be reported as request circulation for a single magazine provided such change has been initiated by the recipient.
- (j) Questionnaires shall contain a provision for the recipient's signature and provision for the date.
- (k) For those media owners wishing to accept requests via electronic medium (e.g., bulletin board, email, diskette, etc.), a copy of 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 that 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 and a provision for the date

Documentation of the respondent's conformance to the Market Served shall be available either through the electronic medium or a secondary source.

At BPA's discretion periodic confirmations shall be made to verify origin of the document or source.

- (l) Prior testing of electronic scripts, systems and procedures for soliciting requests may be required to determine auditability.
- (m) The following types of qualified paid circulation shall be considered as a written request circulation (provision for signature is not required on paid subscription forms):

Individually paid subscriptions direct to the media owner.

Individually paid subscriptions received through third party agents.

Deductible membership benefit subscriptions.

- (n) The qualified recipient's spouse may request the publication on behalf of the qualified recipient. This may be reported as "Direct Request: Written".
- (o) The qualified recipient may request the publication for themselves and up to one other co-worker and have both requests reported as "Direct Request: Written".
- (p) The qualified recipient's co-worker may request the publication on behalf of one qualified recipient through one questionnaire and be reported as "Direct Request: Written". Requests for multiple (two or more) co-workers shall be reported as Request from Recipient's Company (see standard 1-2 518a).
- (q) The following types of paid circulation are NOT to be reported as request circulation:

Subscriptions sold in quantities of two or more

Subscriptions ordered by sponsors, donors or gift copies

Non-deductible subscriptions, except those cases where the media owner has obtained a specific request to receive the magazine from the member. However, this does not apply when a non-deductible offer elicits a request to receive an electronic version of the magazine.

Multi-Copy Same Addressee

Company-name-only-addressed subscriptions

1-3 515 Direct Request: Telecommunication

- (a) Telecommunications from individually qualified recipients requesting the magazine may be reported as personal telecommunications request. All outbound Direct Request from Recipient: Telecommunication requests, with the exception of subscriptions to individuals who refuse to be recorded, must be recorded and made available to the auditor at the time of audit.
- (b) Subscriptions to individuals who refuse to be recorded, inbound telecommunication, and interactive voice response (IVR) requests shall comply with the following conditions:

A question approximating the following shall be asked and answered during the telephone interview:

"Do you wish to receive (continue to receive) this publication? Yes ... No ... A personal identifying question must be asked and answered. To permit future verification or your request, please give us your month and/or date of birth - Month ... Day..., or mother's maiden name or high school graduated from."

Other forms of personalized questions which only the recipient and not the media owner is likely to know, may be asked as an alternate should the recipient not provide an affirmative response to the original question. Once a particular question is used and the answer stored, a different question shall be used for future request questions. If the respondent refuses to answer any and all personal questions, the interview may be considered a request if the interview is tape-recorded and the respondent indicates affirmative to the request question. The personalized question is not required for faxes, or if the interview is tape-recorded.

If the call is being recorded, the media owner may use any of the following script options to obtain the request:

Option #1

Do you wish to receive this publication?

Do you wish to continue to receive this publication?

Option #2

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription should go to (address). Is that correct?

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription is going to (address). Is that still the correct address?

Option #3

In order to receive your free subscription to (publication name), I just need a few moments to update some information, ok? I have your name as...

In order to continue receiving your free subscription to (publication name), I just need a few moments to verify some information, ok? I have your name as...

Option #4

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we may begin sending you a free subscription to our publication, ok?

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we may continue sending you a free subscription to our publication, ok?

Option #5

Hello. This is (caller's name) from (magazine name). I'd like to start your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

Hello. This is (caller's name) from (magazine name). I'd like to renew your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

(c) A telephone interview form shall:

Contain adequate instructions (script) to the telephone interviewer (outbound calls) or to the recipient (inbound calls) including a statement in accordance with local laws, that the call is being recorded;

Contain the name, title, company address and telephone number of the recipient;

Contain an acceptable request question with a personalized data question coupled to the request for subscribers who refuse to be recorded (as defined above). The personalized data question is required only if the telephone call is not recorded;

Be consistent with the Market Served and Method of Distribution;

Be signed and dated by the interviewer for outbound calls and for inbound calls, is properly recorded by the receiver;

When calls are recorded it is acceptable to confirm, name, address, title, email, fax, phone number, and prior-year demographic information during the telephone interview.

- (d) The qualified recipient's spouse may request the magazine on behalf of the qualified recipient. This may be reported "Direct Request: Telecommunications."
- (e) The qualified recipient may request the publication for themselves and up to one other co-worker and have both requests reported as "Direct Request: Telecommunication."
- (f) The qualified recipient's co-worker may request the publication on behalf of the two qualified recipients through one phone call and be reported as "Direct Request: Telecommunication". Requests for multiple (three or more) co-workers shall be reported as Request from Recipient's Company (See 1-3 519).

Media owners contacting a co-worker to elicit direct request: telecommunication shall comply with the same conditions concerning telecommunication requests set forth in these standards. In addition, the media owner shall obtain the full name and job title of the individual interviewed.

- (g) Telecommunication requests for a multiple of different publication brands obtained in a single telecommunication may be counted as telecommunication request circulation provided the interviews are tape recorded, there is a separate request question asked and answered for each of the magazine brands, and such circulation is in conformance with Section 1-3 514e (See 1-3 515j).
- (h) Prior testing of scripts, systems and procedures for soliciting telecommunications request may be required to determine auditability.
- (i) For incoming requests received through telecommunications equipment, adequate records verifying the time and date of call shall be maintained. In addition to the personalized request question, the recipient may be instructed to key a unique identification code taken from the media owner's label.

- (j) Media owners shall be responsible for maintaining the following records which are to be made available to the auditor at the time of audit and/or during random visits:

All telephone company invoices.

All computer-generated data including summaries by date of calls received, telephone numbers of calls, placed and received, and computer logs of tasks performed.

Recordings, where permitted and available, shall be inspected by the auditor to verify adherence to the BPA Worldwide approved interview form and the proper recording by the interviewer of the recipient's response. Whenever conversations are recorded, the recipient shall be advised, in accordance with local laws, that he/she will be recorded. Monitoring of live interviews also may be conducted for the same purpose.

- (k) The media owner shall be responsible for the documentation and accuracy of telecommunication requests including those requests obtained through outside telemarketing firms.
- (l) The auditor will compare and cross-check all records and make any other tests deemed necessary, including follow-up telephone contact and/or mail confirmations, for complete and accurate authentication of the request and qualification information. The media owner shall be billed for the costs incurred for any special confirmations conducted by BPA Worldwide or its agent.
- (m) All other specific standards pertaining to the use of promotional incentives for personal written request circulation (Section 1-3 224), or in the merging of magazines' circulation (Section 1-3 247) apply to telecommunication requests.

1-3 516 Direct Request: Electronic

- (a) For those media owners wishing to accept requests via electronic medium (Web, email, other) 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 request transcripts that meet the following conditions:

Contains adequate instruction (menu and screen panels) to the recipient end user.

Contains a provision for the name, title, and company address of the recipient.

Contains an acceptable request question and a provision for the date.

Outbound solicitations for email requests must include a notification that the subscriber may be contacted by a third party to verify the publication request.

Subscriber access to digital copies may be used to renew a request to continue receiving the digital subscription provided access occurs within the following schedules:

A publication issued 49 issues a year or more must be accessed nine times during the six month period ending with the analyzed issue

A publication issued 37 – 48 issues a year must be accessed seven times during the six month period ending with the analyzed issue

A publication issued 25 – 36 issues a year must be accessed five times during the six month period ending with the analyzed issue

A publication issued 19 – 24 issues a year must be accessed four times during the six month period ending with the analyzed issue

A publication issued 13 – 18 issues a year must be accessed three times during the six month period ending with the analyzed issue

A publication issued 9 – 12 issues a year must be accessed twice during the six month period ending with the analyzed issue

A publication issued 4 – 8 issues a year must be accessed once during the six month period ending with the analyzed issue

A publication issued 1 – 3 issues a year must be accessed once a year

Publications must maintain proof of initial request and subsequent engagement activity for auditor review.

Documentation of the respondent's conformance to the market served shall be available either through the electronic medium or a secondary source.

Web-based, qualification questions may be populated with information obtained through the individual's previous communication with the brand, or third party sources of demographic data and provided the subscriber proactively verifies the data by clicking a single "confirm" button at the bottom of the form for the data populated. Recipients must be asked to review the data and press the "confirm" button to agree that all the data is accurate. The request question ("Do you wish to receive/continue to receive XYZ Magazine?") cannot be pre-populated, unless the subscriber has demonstrated through an action ("i.e. click to subscribe") prior visiting to the qualification page.

- (b) Multiple publication electronic requests are acceptable and may be counted as request circulation, provided that the following requirements are met:

Magazines offered shall be homogeneous, in that they have similar definitions of recipient qualification and serve businesses, industries, trades, occupations or professions with clearly defined limits.

A separate request from the subscriber is necessary to establish a request for each magazine.

The text of the solicitation shall disclose that multiple magazines are being offered.

A description of the editorial content that differentiates the magazines offered shall be included on the qualification card. The offer form shall display the different magazine logos to increase differentiation among titles.

A question approximating the following shall be asked:

Please check here if you wish to receive Magazine XXX

Please check here if you wish to receive Magazine YYY

Please check here if you wish to receive Magazine ZZZ

- (c) The qualified recipient's spouse may request the publication on behalf of the qualified recipient. This may be reported as "Direct Request: Electronic".
- (d) The qualified recipient may request the publication for themselves and up to one other co-worker and have both requests reported as "Direct Request: Electronic".

- (e) The qualified recipient's co-worker may request the publication on behalf of one qualified recipient through one questionnaire and be reported as "Direct Request: Electronic". Requests for multiple (two or more) co-workers shall be reported as Request from Recipient's Company (See 1-3 520).

1-3 517 Request From Recipient's Company:

1-3 518 Written

- (a) Questionnaires or letters on a company letterhead from firms requesting copies of a magazine for two or more employees identified by name, title and/or function may be reported as written request from recipient's company.
- (b) Media owners electing to use a standardized questionnaire to develop such company request circulation shall comply with the following conditions:

A statement approximating the following shall appear on the form:

"Please send this magazine to the following employees".

- (c) Such questionnaires or letters shall include instructions to the company to verify each name appearing on the list for correct mailing address information. In addition, the company shall be instructed to fill in or otherwise indicate for each name on the list the recipient's industry, title and/or functional description. Such letters of instruction shall be submitted to BPA Worldwide for approval prior to printing.
- (d) Questionnaires shall contain a provision for signature and a provision for date.
- (e) Each name deleted from the list by the company shall be removed from the qualified circulation within 90 days of receipt of the communication.
- (f) The format and terminology used in standardized questionnaires and requalification forms to develop Written Request from Recipient's Company shall be approved by BPA Worldwide prior to use. BPA Worldwide's approval will be given to standardized questionnaires and requalification lists that meet the above conditions and are consistent with the Market Served and the classifications reported in Paragraph 3 of the brand report.
- (g) The auditor may conduct direct mail confirmations and make any other tests considered essential to the complete and accurate authentication of this source. (See 3-6 104)
- (h) The following types of non-paid circulation may be considered as written request from recipient's firm providing such circulation is in conformance with Sections 1-3 518b to e.

Non-paid request from recipient's firm.

Non-paid multi-copy same addressee circulation.

- (i) The following types of paid subscriptions may be reported as written request from recipient's firm in conformance with Section 1-3 518b to e above:

Subscriptions sold in quantities of two or more paid for by an employer for their employees.

Sponsored Subscriptions Individually Addressed.

Multi-Copy Same Addressee.

- (j) The following types of paid circulation are NOT to be reported as written request from recipient's firm:

Non-deductible subscriptions (except in those cases where the media owner has obtained a specific request to receive the magazine from the member).

Gift subscriptions.

- (k) Whenever a promotional incentive is offered as an inducement to obtain either qualified non-paid or qualified paid request circulation from recipient's firm, the media owner shall identify the premium and the quantity used in a footnote in paragraph 4.
- (l) Whenever two or more magazines are merged, request circulation from recipient's firm shall be footnoted in paragraph 4 indicating the percentage of request circulation from each of the merged magazines.
- (m) Whenever "company name only" addressed subscriptions are purchased (paid) or requested (non-paid), this circulation shall be reported as "request from recipient's company".

1-3 519 Request from Recipient's Company: Telecommunication

- (a) Telecommunications such as telephone calls from a co-worker at a company requesting copies of the magazine for other co-workers (one person requesting for two or more persons) of that company may be reported as telecommunication request from recipient's company.

Such calls may be eligible to be considered as Direct Request: Telecommunication provided they comply with standard 1-3 515b and 515e.

Outbound solicitations for request from recipient's company: telecommunication must be recorded and made available to the auditor at the time of the audit.

- (b) Media owners electing to use telecommunications for company request shall comply with the following conditions:

Calls shall be recorded, however, if recipient refuses to be recorded, a personal identifying question must be asked and answered. A question approximating the following shall be asked and answered during the telecommunication: "Please send this publication to the following employees," or "Do you want this magazine sent to any other employees? Yes ... No ... To permit future verification of your request, please give us your month and/or date of birth - Month ... Day ... or mother's maiden name or high school graduated from." Other forms of personalized questions which only the interviewee and not the media owner is likely to know, may be asked as an alternate should the interviewee not provide an affirmative response to the original question.

Once a particular personal identifying question is used and the answer is stored, a different question shall be used for future request questions.

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

The name and title and/or function of the requestor shall be provided along with the company, address, and telephone of the company.

A question of a co-worker approximating the following shall be stated during the tele-communication: "Do you want this publication sent to any other employees? "Yes ... No ... "

In the case of a requalification effort the co-worker may be asked, "May we continue to send (name of publication) to (name of qualified subscriber)."

"All I need to do is update the address information and ask a few quick questions and we'll be able to continue (name of qualified subscriber's) subscription for another year, ok?"

Other options:

Option #1

Do you wish to confirm (name of qualified subscriber) should receive this publication?

Do you wish to confirm that (name of qualified subscriber) should continue to receive this publication?

Option #2

All that I need to do is update the address information and ask you a couple of questions to send out a free subscription to (name of qualified subscriber). We show that the subscription should go to (address). Is that correct?

All that I need to do is update the address information and ask you a couple of questions to send out a free subscription to (name of qualified subscriber). We show that the subscription is going to (address).

Is that still the correct address?

Option #3

In order for (name of qualified subscriber) to receive a free subscription to (publication name), I just need a few moments to update some information, ok? I have his/her name as...

In order for (name of qualified subscriber) to continue receiving a free subscription to (publication name), I just need a few moments to verify some information, ok? I have his/her name as...

Option #4

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we may begin sending (name of qualified subscriber) a free subscription to our publication, ok?

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we may continue sending (name of qualified subscriber) a free subscription to our publication, ok?

Option #5

Hello. This is (caller's name) from (publication name). I'd like to start a free subscription for (person's name) and just need to ask you a couple of questions to be able to do so. I have the address as (address). Is this correct?

Hello. This is (caller's name) from (publication name). I'd like to renew a free subscription for (name of qualified subscriber) and just need to ask you a couple of questions to be able to do so. I have the address as (address). Is this correct?

- (c) All other conditions pertaining to telecommunications outlined in Sections 1-3 515 and 1-3 525 except in conditions specified for "personal request" telecommunication shall be followed.

1-3 520 Request from Recipient's Company: Electronic

- (a) Electronic communications such as email, Internet, Web communications and others from authorized individuals or from a company requesting copies of the magazine for two or more employees of that company may be reported as Request from Recipient's Company: Electronic.
- (b) Media owners electing to use this form of company request shall comply with the following conditions: (See 1-3 516)

- (c) 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 that only the recipient and not the media owner are likely to know are also permissible. Once a particular question is used and the answer is stored, a different question shall be used for future request questions.

- (d) The names and titles and/or functions of the employees shall be provided.
- (e) The name and title and/or function and email address of the authorized requestor shall be provided, along with the company name, address, and telephone number of the company.
- (f) All other conditions pertaining to Internet as outlined in standard 1-3 514I shall be followed.
- (g) All other conditions outlined in standard 1-3 516 except in conditions specified for "personal request" electronic shall be followed.

1-3 521 Other than Request

1-3 522 Membership Benefit

Individual and organizational memberships in associations or societies or clubs etc. where the subscription is paid for out of membership dues and the member does not have the option of deducting the subscription price from the dues (non-deductible membership benefit subscriptions).

1-3 523 Communication from Recipient or Recipient's Company (Other than Request):

1-3 524 Written

- (a) 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 media owner 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. Street rack distribution must receive the permission of the municipality governing the public space. Agreements are required for each municipality or private location, not each street rack (See 1-3 246b).

For magazines in the United Kingdom, redistribution agreements are not required. Signed delivery affidavits 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 each issue (See 1-3 531).

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.

- (b) 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 age based on the qualification date of the original source document.

The quantity of names added to the file shall be properly identified in the explanatory paragraph, Additional Data, stating:

"Communication from Recipient or Recipient's Company (Other than Request): Written" includes (number) copies or (number) % requests for XYZ Magazine."

Whenever 5% or more of the total circulation is qualified through questionnaires from another magazine, the number of sources used and the amount of circulation from those sources shall be disclosed in the explanatory paragraph, Additional Data as follows:

"Communication from Recipient or Recipient's Company (Other than Request): Written" includes [number] sources of circulation for quantities of [lowest number] copies or [lowest] % to [highest number] copies or [highest] %.

The source shall be identified by name in a footnote in the explanatory paragraph, Additional Data whenever 10% or more of the circulation is qualified through questionnaires from a single magazine.

Questionnaires from another magazine from another parent publishing company shall not be reported as Communication from Recipient or Recipient's Company (Other than Request): These are reported as "Other Sources".

1-3 525 Communication from Recipient or Recipient's Company (Other than Request): Telecommunication

- (a) The following telecommunication to a media company 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 the explanatory paragraph, Additional Data with additional comments, stating:

"Communication from Recipient or Recipient's Company (Other than Request): Telecommunication" includes (number) copies or (number) % requests for XYZ Magazine."

Whenever 5% or more of the total circulation is qualified through questionnaires from another magazine, the number of sources used and the amount of circulation from those sources shall be disclosed in the explanatory paragraph, Additional Data as follows:

Communication from Recipient or Recipient's Company (Other than Request): Telecommunication" includes [number] sources of circulation for quantities of [lowest number] copies or [lowest] % to [highest number] copies or [highest] %."

The source shall be identified by name in a footnote in the explanatory paragraph, Additional Data whenever 10% or more of the circulation is qualified through questionnaires from a single magazine.

- (b) Telephone interview forms shall be submitted to BPA Worldwide for approval.
- (c) BPA Worldwide's approval will be given to any questionnaire that is consistent with the Market Served and the classifications reported in Paragraph 3 of the brand report.
- (d) 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.
- (e) These forms shall be adequately identified and dated to permit the auditor to satisfy him/herself of their authenticity and acceptability.
- (f) Whenever three or more 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 1-3 248).
- (g) 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 media owner shall be billed for the costs incurred for any special tests.
- (h) Telecommunication questionnaires from another magazine from another parent publishing company shall not be reported as Communication from Recipient's Company (Other than Request): telecommunication these are reported as "Other Sources".

1-3 526 Communication from the Recipient or Recipient's Company (Other Than Request):

Electronic

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

Standardized questionnaires to a media company, such as:

Census forms

Editorial survey forms

Questionnaires that do not have the provision for the “Yes/No” request question

- (b) 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.

- (c) BPA Worldwide’s approval will be given to any questionnaire that is consistent with the Market Served and the classification reported in Paragraph 3 of the brand report.
- (d) These questionnaires shall be adequately identified and dated to permit the auditor to be satisfied with the authenticity and acceptability.
- (e) 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 1-3 248).
- (f) The following standardized questionnaires from another magazine shall be reported as Communication from the Recipient or Recipient’s Company (Other Than Request): Electronic provided the other magazine is of the same parent publishing company:

Personal Electronic request forms direct from the recipient

Electronic request forms from the recipient’s company

Electronic 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 the explanatory paragraph, Additional Data with additional comments, stating:

“Communication from Recipient or Recipient’s company (Other than Request): Email includes (number) copies or (number) % requests for XYZ Magazine.”

- (g) Questionnaires from another magazine from another parent publishing company shall not be reported as Communication from Recipient or Recipient’s Company (Other than Request): Electronic. These are reported as Other Sources.

1-3 527 PASSIVE SOURCES

1-3 528 Independent Field Reports

Field reports obtained by independent field service organizations under contract to the media owner shall be adequately identified and dated to permit the auditor to be satisfied of their authenticity and acceptability. Such circulation is reported as “Other Sources”.

Field service organization reports obtained by interview with the qualified recipients may be counted as request circulation provided the recipient signs the questionnaire requesting the magazine.

The CEO of BPA may require the media owner to furnish such information about the organization and its procedures, and may make such independent investigations as deemed necessary to determine whether or not the reports constitute satisfactory evidence of qualification.

1-3 529 List Sources

Association/Society or Club etc. membership lists, manufacturers' or distributors' lists of customers, prospects and licensees are acceptable evidence of qualification providing such lists are adequately identified and dated to satisfy the auditor of their authenticity and acceptability. If the executive director of an Association/Society or Club requests subscriptions for their members, the subscription request may be disclosed in a footnote in the explanatory paragraph, Additional Data.

1-3 530 Business Directories

All printed and published directories, including directory issues of periodicals and industrial directories or those available on compact disk or through the Internet, shall be adequately identified and dated to satisfy the auditor of their authenticity and acceptability.

To determine the qualification date of a directory, the month and year of the copyright or the date of printing (the earliest date) shall be used. In the event that a month does not appear, the following shall apply:

A directory dated on the cover, or compact disk (CD) dated for one year only shall have a qualification date of January 1 of that year.

A directory dated on the cover, or compact disk (CD) dated for two or more years shall have a qualification date of July 1 of the first year.

A directory dated on the cover, or compact disk (CD) dated with a specific month and year would have a corresponding qualification date.

1-3 531 Other Sources

Business letterheads, company personnel rosters, company annual reports, company telephone directories, business cards, trade shows registration lists, reader service cards and qualification questionnaires from other publications not owned by the same parent company. Such sources shall be adequately identified and dated to satisfy the auditor of their authenticity and acceptability.

Qualification questionnaires from another Magazine from another parent publishing company shall continue to age based on the qualification date of the original source document.

Circulation obtained through the use of Sweepstakes and Prize Draws shall be classified as other sources (See 1-3 238).

Gift subscriptions shall be classified as other sources.

Mailing house lists which have been approved by BPA Worldwide may be reported as other sources and shall carry an identifying footnote.

Mailing house lists which have not been approved by BPA Worldwide are not acceptable as qualification evidence. However, in order to obtain BPA Worldwide approval, a media owner may arrange with a mailing house to have the list checked against the original sources provided such sources are within the time limits prescribed in these Standards and are available to the auditor. If a media owner elects to report the original qualification sources in paragraph 4 of the-brand report, the mailing house shall prepare the data for this paragraph and shall be subject to all requirements for the auditing of paragraph 4.

For magazines in the United Kingdom, redistribution agreements are not required. Signed delivery affidavits 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 each issue.

1-3 532 QUESTIONNAIRE DESIGN

Whenever a questionnaire is used to elicit information from a recipient, the questionnaire and attendant material shall not improperly lead the recipient to give the desired qualification data in order to receive the magazine.

1-3 533 Primary Business Information

Whenever a questionnaire is used to elicit specific information about a recipient's business, a question approximating one of the following shall be asked on the form:

"What is your primary business? (Check one only.)"

"The primary business of my firm at this location is (Check one only.)"

"Please check the one item which best describes your firm's primary business activity. (Check one only.)"

Insert
Letter

☐

"Please indicate the primary end product (or service performed at your business by writing the corresponding letter of the alphabet in the box at the left."

1-3 534 Job Title – Obtaining Job Title Information

Whenever a questionnaire is used to elicit specific information about a recipient's title, a question approximating one of the following shall be asked on the form:

"What is your title? (Check one only.)"

"What is your title? (Please be specific.)"

1-3 535 Job Function - Obtaining Job Function Information

Whenever a questionnaire is used to elicit specific information about a recipient's job function, a question approximating one of the following shall be asked on the form:

"What is your primary job function? (Check one only.)"

"Please check the one category that best describes your primary job function. (Check one only.)"

"Job function (Please rank in order of importance 1, 2, 3, etc.)"

Insert
Letter

☐

"Please indicate your primary job function by writing corresponding letter of the alphabet in the box at the left."

1-3 536 Recordkeeping Worksheets Maintained by the Media Owner

BPA Worldwide can supply all the necessary worksheets to the media owner for the completion of the data reported in the brand reports.

Those magazines not reporting qualified paid circulation separately in paragraphs 2 through 5 will use the following forms:

Form 1-2

Form 3-5

Form 4

Those magazines reporting qualified paid circulation separately in paragraphs 2 through 5 will use the following forms:

Form 1-2

Form 3a-3d

Form 3-5*

Form 4* if reported

*Form shall be kept separately for the qualified non-paid and qualified paid circulation.

Form 1-2 (Circulation Breakout by Issue) - Is a perpetual inventory of circulation which will record the qualified non-paid, and paid circulation by issue.

Form 1-2a (Date of Mailing by Issue) - Records the date of mailing and number of copies mailed for each issue including any late mailing of copies.

Form 3a-3b (Analysis of Qualified Paid Subscription Sales) - Records the sales by month for the period of qualified paid subscriptions, by prices, length of subscriptions, and use of promotional incentives. Reporting of pricing and use of Promotional Incentives paragraphs are optional.

Form 3-5 (Geographical and Classification Breakout) - Records the qualified circulation count of the issue analyzed in paragraphs 3 and 5 by classification within each state or other geographical area. The reporting of information on this form is mandatory for all magazines.

All magazines reporting qualified paid circulation in paragraphs 2 through 5 shall run a printout proof of all names on the qualified circulation mailing list every six months and use this form.

Form 5 (Qualification Source Breakout) - Records qualification sources by age for the qualified circulation of the issue analyzed. This count is obtained from a physical count of the mailing list, for the issue analyzed, of the entire qualified circulation. The reporting of information on this form is mandatory for all magazines preparing their second six months brand reports, and optional for the reporting of this information on the interim brand report.

Arrears Form (Post Expiration Copies Included In Total Qualified Circulation) - Records the qualified circulation by state of the issue analyzed for potential renewals unpaid up to three months (See 1-3 209).

Renewal Rate Form - Records the renewal percentage computation for the expired qualified paid subscriptions by state or other geographical areas for the period analyzed, and the renewal of these qualified paid subscriptions. Reporting renewal rate is optional.

While BPA Worldwide supplies these official forms, equivalent forms prepared by the magazine and approved by the CEO of BPA may be used.

The preparation, maintenance and availability of all requirements and records necessary for an audit as stated in these Standards shall be the responsibility of the media owner. The employment of outside agents or firms for any and all circulation work does not relieve the media owner member of their responsibility.

1-4 DATABASE

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1-4 DATABASE STANDARDS

1-4 100 ELIGIBILITY

1-4 101

Media owners who possess electronic databases of information organized so they can be accessed, managed, and updated, may request BPA audit service for verification.

1-4 102

These databases are generally commercially available for rent in entirety or for specific portions based on the demographic profiles or contact details and require third-party verification of the accuracy and deliverability of the information.

1-4 200 DEFINITIONS

1-4 201 Audit Report

The audited report released by the corporation attesting to the accuracy and validity of the database owner's claims.

1-4 202 Definition of Recipient Qualification

A statement by the database owner describing one or more specific groups of recipients who have common interest with clearly defined limits contained within the database.

1-4 203 Duplication

The same addressee or individual appearing on the list more than once shall be considered duplication.

All duplicated names shall be reported in paragraphs 1, and 3a of the database report as "duplicated records" or the duplicated records shall be removed from the qualified database list.

If duplication exceeds 10% or more of the average qualified, disclosure in the Definition of Recipient Qualification shall occur confirming the existence of duplication.

1-4 204 Field Served

A statement by the database owner describing one or more specific businesses, industries, trades or professions with clearly defined limits.

1-4 205 Non-Qualified Data

Any addressees contained within the database which do not conform to the field served and definition of recipient qualification.

1-4 206 Qualified Data

Data for which the mailing address conformance to the Field Served and Definition of Recipient Qualification, and correct classification in Paragraph 3a, are verified by auditable documentary evidence dated as shown in paragraph 3b the database report.

1-4 207 Qualified Individuals

Addressees who meet the Definition of Recipient Qualification within the Field Served.

1-4 208 Qualification Period

The age of documents used to qualify the data reported in paragraph 3b of the report. The maximum qualification period is three years.

1-4 209 Supplementary Question

A supplementary question is defined as a question eliciting any data regarding respondents' purchasing authority and/or multiple response categories, or any data which relates to purchasing authority of only a specific portion of the data file.

1-4 300 DATABASE AUDIT REPORT - GENERAL

1-4 301

Database members shall report their data on forms supplied by the Corporation.

1-4 302

Database media owners may release stand-alone database audit reports, or elect to release the data within a BPA Brand Report.

1-4 303

The filing of the data with the Corporation shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, data and other data, in any form and manner authorized by the Board of Directors.

1-4 304

In the interests of uniformity in appearance and typographical setup of the BPA Worldwide database audit reports, BPA Worldwide will process all paragraphs which require special typesetting, ruling and extra pages. Where additional costs are incurred in setting up special paragraphs the database member shall be billed those costs.

1-4 305

Time required to process a database audit report shall be charged for at a uniform rate to be set from time to time by the Board of Directors.

1-4 306

Database Applicant - An applicant shall complete and successfully pass an initial audit. Upon completion of the audit and acceptance by BPA's Internal Audit Dept., the database will be admitted to membership.

1-4 307

Database Members - BPA Worldwide Database Members will release one twelve-month annual audit report.

1-4 308

The audit will be completed after the auditor's examination of the database owner's records. The audit period covered shall be no more than twelve months subsequent to the previous audit report.

1-4 309

The audit will be made wherever the records can be properly checked.

1-4 310

Printed records of audit reports may be purchased by a member of the Corporation at a price established by the Board of Directors.

1-4 311

All language and terminology shall be factual and auditable.

1-4 312

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards.

1-4 313

In the event of a disagreement with a decision of the CEO of BPA, a database owner member may request a hearing before an appropriate committee of the Board of Directors.

1-4 400 DATABASE AUDIT REPORT – CONTENTS

1-4 401 General

The Database report contents included in this section apply to both standalone and Brand reports.

1-4 402

The first page of the report shall contain the name of the Database; Database owner; principal telephone number; fax number; email address; Web site URL; address of the Database owner and logo. The Quick Response (QR) code may be included at the media owner's option.

1-4 403 Description of List and Source Name

Shall include a description of the database and details of the sources used to compile the database (If applicable) and how it is updated.

1-4 404 List Total

Shall disclose the following:

The database total as of (MM/YY) is <NUMBER>

1-4 405 Purpose

Details the data analyzed within the report.

Example: The data reported herein is an analysis of title/function.

1-4 406 Method of Confirmation

Shall contain a statement detailing how the data was verified during the audit process. The following shall appear on all reports:

Demographic information reported herein was confirmed by BPA Worldwide through the following procedures: A sample was drawn by audit personnel using a random starting point and an interval selection thereafter. For the selection:

- a. A confirmation letter test was conducted to verify accuracy of all sources.
- b. (Any additional verification method)
- c. (Any additional verification method)
- etc.

1-4 407 Duplication

The level of duplication found in the database shall be disclosed (See 1-4 203). The following comment shall appear on the front of the report:

The level of duplicate records on the database was found to be (X%) or (number) of total.

1-4 408 Paragraph 3a: Business/Occupational Breakout of Qualified Records

- (a) Database members reporting demographic data shall report such data in the following columns:

Total Qualified Records

% of Total Qualified Records

The classifications for such records shall be based upon the most recent qualification source for each piece of demographic information used to qualify records.

- (b) Business and industry classifications may be listed vertically in the left-hand column of this paragraph if or when reported. Classifications by size, volume, job titles or job functions may be listed in one of the following ways:

Horizontally in a cross-tabulation breakout

Vertically in the left hand column

Separately

As a subdivision of a business or industry classification

1-4 409 Paragraph 3b: Qualification Source Breakout

- (a) Shall contain an analysis (count and percentage) of the qualified records by source. Media owners have the option to report age of source of the non-paid circulation using 1, 2, and 3-year columns.
- (b) In reporting qualification, figures submitted by the database owner covering the number of records qualified from each source shall be determined by an actual count of the entire list for the file being analyzed. This count may be obtained from the entire qualified database.
- (c) Detailed coding information for each source classification shall be maintained for all qualified records. The following schedule of sources of qualification shall be listed in Paragraph 3b:

I. Direct Request

II. Request From Recipient's Company

III. Membership Benefit

IV. Communication (other than request)

V. Total sources other than above, including: association rosters and directories, business directories, manufacturer's, distributor's and wholesaler's lists, and other sources

Database owners may report written, telecommunication, and electronic request at their option.

Database owners may report expanded breakouts of association rosters and directories, business directories, manufacturer's, distributor's and wholesaler's lists separately, at their option.

- (d) The database owner shall insert opposite each source the number of records for each source.
- (e) The source material shall be identified in a footnote in the explanatory paragraph, Additional Data, whenever 10% or more of the records are qualified through any one of the following:

A single business directory

A single association roster or directory

A single "other source"

Disclosure of the identity of Manufacturer, Distributor, Wholesaler lists shall be optional.

- (f) Whenever 5% or more of the total records are qualified through any combination of Association Rosters or Directories, Business Directories, Manufacturer, Distributor and Wholesaler lists, or Other Sources, the number of sources used and the amount of records from those sources shall be disclosed in the explanatory paragraph, Additional Data as follows:

Association Rosters and Directories include (number) sources for quantities of (lowest number) records or (lowest) % to (highest number) records or (highest) %.

This note is to be included for each type of source used.

- (g) Database members may elect to report a breakout of their qualified United States and international records by source and qualification time period in paragraph 3b.
- (h) A comment referencing how the source data is updated, continuously, monthly, etc. shall be included in the explanatory paragraph, Additional Data and cross referenced to Paragraph 3b.

1-4 410 Paragraph 3c: Mailing Address Breakout of Qualified Records (Optional)

- (a) If reported, shall contain a mailing address analysis (count and percentage). The file being analyzed shall be the same one as analyzed in paragraph 3a.
- (b) A record shall be counted in one of the following four categories based on the mailing data appearing on the label:

Individuals by name and title and/or function.

Individuals by name only

Titles or functions only

Company names only

- (c) However, individually addressed recipients without titles may be counted in the category "Individuals by name and title and/or function" provided the title or function is supported by auditable documentary evidence.
- (d) All records directed to "Library" or "Librarian", regardless of name and/or title, shall be reported in "Company names only."
- (e) A database owner may substitute the term "Store names only" for "Company names only" whenever necessary or may make other equivalent changes in "Company name only" with the written approval of the CEO of BPA.

1-4 411 Paragraph 4: Geographical Breakout of Qualified Records

Shall contain an analysis (count and percentage) of the records by geographic region

Regions representing 0-4.9% shall report database records by the geographic areas listed in Section "e" of this Standard.

Regions with 5.0% - 24.9% shall report by country. Standard country breakouts are available for each region.

Countries with 25%+ shall report records by state/province or other agreed upon market geographic breakdown within any one country, using standard BPA Worldwide tables (Canada, China, United Arab Emirates, United Kingdom, and the United States, available within BPA's on-line filing system website).

Where BPA Worldwide has not published a standard table and a database has over 25% of Worldwide will work with the media owners in the market to establish a standard table.

- (a) For records in the United States, paragraph 4 will report the following regional breakout which is consistent with that of the U.S. Bureau of Census:

New England	East South Central
Middle Atlantic	West South Central
East North Central	Mountain
West North Central	Pacific
South Atlantic	

In addition, U.S. Territories, Canada, Mexico, Other International, APO/FPO addressed records shall be reported.

Database owners may report records by state and three digit zip code prefixes or counties, at their option.

- (b) For regional reporting of records in Canada, paragraph 4 will report the following:

Newfoundland	Ontario
Prince Edward Island	Manitoba
Nova Scotia	Saskatchewan
New Brunswick	Alberta, N.W.T and Nunavut
Quebec	B.C. and Yukon

- (c) For records in the United Kingdom, it is sufficient to solely report "United Kingdom" in paragraph 4.

Database owners may elect to report records in the United Kingdom by region using the following breakout:

Northern	Scotland
Yorkshire & Humberside	Wales
North West	East Anglia
East Midlands	Greater London
West Midlands	South East
Northern Ireland	South West

- (d) For regional reporting of records for China, paragraph 4 will report the following which is consistent with the People's Republic of China Administrative Standard Regions:

Northeast	East China
North China	Central South
Northwest	Southwest
Other	

Database members reporting more granular than regional records within the People's Republic of China shall report by province/city using the BPA Worldwide standardized breakout.

(e) International records shall be reported using the following regional breakout:

Asia	Caribbean
MENA (Middle East North Africa)	Central America
Europe	South America
Africa	Asia Pacific
North America	

In addition to reporting the standard paragraph 4, database members may have the option of including a map to graphically display their record distribution.

1-4 412 Verification Mailing

Includes a description of the verification mailing to the database. The following comment shall appear in the additional data section on all database audit reports:

In addition to the examination to the physical records maintained by the list owner to verify the data reported in section 3a, 3b (3c if reported) and 4, a verification mailing was conducted on a randomly selected sample of (number) names to confirm deliverability. The following is an analysis of the results of this test.

1-4 413 Deliverability

The results of the address deliverability testing shall be disclosed on the audit report as follows:

Based on the number of verification letters returned by the Postal Service, the deliverability of the list was <%>.

If a region does not have the ability to supply postal returns, this figure will not be reported.

1-4 414 Additional Data

Shall contain any additional explanatory information necessary to supplement facts reported elsewhere in the report.

Only data approved by the CEO of BPA shall be shown in this paragraph.

1-4 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-4 501 General

An electronic file of all names in the analyzed database (as a snapshot) or data set “frozen” at a point in time shall be available.

Full contact details including name, address, phone number and email address and any/all applicable demographic information, including source, shall be included in the database.

If the qualified names from the database are to be later added to a magazine circulation list, the frozen date shall be the qualification date for all subscribers in the database.

1-4 502

A physical count of the database list may be made by geographical distribution, and by the demographic classifications claimed in the demographic table, including the date the demographic data was obtained.

1-4 503

The classification count (by types of classifications) shall be compiled by state or other geographical area unless otherwise provided for by the CEO of BPA. Suitable forms for the tabulation of these counts will be supplied by the Corporation.

1-4 504

Proof of demographic classification as reported in paragraph 3a shall be available for all records with claimed demographics. This proof may be no older than three years from the date of the analyzed database. If the classification in paragraph 3a contains data that cannot change – such as year of medical school graduation – the proof may be older than three years from the date of the analyzed database.

1-4 505

For all records on the auditor's test, proof of supporting documentation to support all demographics reported in paragraph 3a, source and age as reported in paragraph 3b, mailing address information if reported in paragraph 3c and geographic data as reported in paragraph 4, is required.

1-4 506

The auditor will compare and cross-check all records and make any other tests deemed necessary to verify the authenticity of the data.

1-4 507

Compliance testing shall be completed by the auditor to verify all demographic and deliverability information.

1-4 508

Any other records deemed necessary by the Corporation in the fulfillment of its service shall be made available.

1-4 509

All records necessary for the verification shall be retained by the media owner and made available to the corporation upon request.

1-5 DOCUMENT DOWNLOAD

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1-5 DOCUMENT DOWNLOAD STANDARDS

1-5 100 ELIGIBILITY

Media Owners who possess brand related documents such as white papers, case studies, marketing collateral etc. may request BPA audit service for verification of the quantity of downloads for each type.

These documents are available for download on a fee basis, or free of charge. They may be archived for future retrieval and reported in conjunction with a brand owner's other media channels of audience engagement.

Downloadable documents may also provide opportunities for advertising or sponsorships.

1-5 200 DEFINITIONS

Document downloads are an authoritative document intended for public consumption and/or a document to educate interested parties on specific products or services offered by a company.

Examples of document downloads are:

1-5 201 Case Studies

Case studies may be descriptive or an explanatory report created to demonstrate factors usually contributing to the success of an action or service.

1-5 202 Marketing Collateral

Marketing collateral is a collection of marketing communications pieces used as part of an organization's overall marketing strategy. They often consist of brochures or data sheets that provide an overview of the features of a product or service, and/or demonstrate and describe an organization's products or services.

1-5 203 Unique Download

The unduplicated count of the total number of individual downloads of a white paper, case study, marketing collateral piece, etc.

1-5 204 White Paper

An authoritative report or guide issued by an organization or company.

1-5 300 DOCUMENT DOWNLOAD REPORT - GENERAL

Document download reports shall express their distribution in reports and formats approved by the Corporation.

Media owners may release this data in standalone Audit Reports, or elect to release the data within a Brand Report.

The filing of document download data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, distribution data and other data, in any form and manner authorized by the Board of Directors.

1-5 301 REPORTING REQUIREMENTS

Only documents released and downloaded in the period of the brand report may be included in the report and counted in the total downloaded for the period.

At the option of the owner, the net total of all documents downloaded in the period (regardless of their original release date) can be reported as additional data. Proof of these downloads shall be available and presented at the time of the audit.

1-5 302

Time required to process the audit report shall be charged for at a uniform flat rate to be set from time to time by the Board of Directors.

1-5 303

Applicant - An applicant shall complete and successfully pass an initial audit. Upon completion of the audit and acceptance by BPA's Internal Audit Dept., the media owner will be admitted to membership.

1-5 304

Members - The audit will be completed after the auditor's examination of the media owner's records. The audit period covered shall be no more than twelve months subsequent to the previous audit report.

The audit will be made wherever the records can be properly checked.

1-5 305

Printed records of audit reports may be purchased by a member of the Corporation at a price established by the Board of Directors.

1-5 306

All language and terminology shall be factual and auditable.

1-5 307

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards.

1-5 308

A member may not claim nor imply that BPA Worldwide audits readership or intent to read.

1-5 309

In the event of a disagreement with a decision of the CEO of BPA, a database owner member may request a hearing before an appropriate committee of the Board of Directors.

1-5 400 DOCUMENT DOWNLOAD AUDIT - CONTENTS

All downloads shall be reported on a monthly basis. They will be reported as the total number of monthly downloads cross tabulated by the title of the document. These may also be grouped and categorized as white papers, case studies or marketing collateral released in the period.

1-5 401

Individuals downloading each specific white paper, case study, marketing collateral piece, or other document may be counted only once per document. Duplicate downloads of the same document shall be removed in order to obtain a net number of individuals who downloaded each specific item.

It is possible there may be several white papers, case studies or marketing collateral pieces released in a reporting period. The number of downloads reported will reflect the net number of unique individuals who downloaded each specific item; however, an individual downloading different documents during the period may be counted per occurrence.

At the media owner's option, the number of unique individuals downloading all documents in the period may be reported. For example, one unique individual may have downloaded six unique documents during the period and would count as one.

1-5 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-5 501 General

An electronic file of all downloads for each white paper, case study, marketing collateral piece or other document released in the period shall be provided to the auditor. A physical count of the download list may be by geographical location, and by demographic classifications including the date the demographic data was obtained.

The demographic classification count (by types of demographic classifications) shall be compiled by state or other geographical area unless otherwise provided for by the CEO of BPA. Suitable forms for the tabulation of these counts will be supplied by the Corporation.

The database provided shall include the list of all downloads for each item reported in the period. Details may include: name, address, phone number and email address; and all applicable demographic information.

1-5 502

Media owners shall provide for the auditor's examination proof of distribution and/or download for every document reported in the period.

1-5 503

Sufficient proof of downloads and/or distribution shall be provided to cover the total number reported for each item.

1-5 504

Summary reports of downloads/distribution shall be provided to the auditor for every document download reported in the period.

1-5 505

Sample registration pages and forms shall be provided for all document downloads reported in the period.

1-5 506

Copies of all white papers, case studies, marketing collateral pieces etc. and corresponding solicitations shall be available and provided for every item reported in the period.

1-5 507

The auditor will compare and cross-check all records and make any other tests deemed necessary to verify the authenticity of the data, including confirmation testing to verify receipt of a download.

1-5 508

If reported, proof of demographic classification shall be available for all recipients with claimed demographics. This proof may be no older than three years.

1-5 509

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

1-5 510

Any other records deemed necessary by the Corporation in the fulfillment of its service shall be made available.

1-6 EMAIL NEWSLETTERS

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1-6 EMAIL NEWSLETTERS STANDARDS

1-6 100 ELIGIBILITY

An Email Newsletter applying for BPA audit service shall be a communications platform for companies to deliver electronic messages to individuals typically on a prescribed interval. They may be sent with any frequency i.e. daily, weekly, bi-weekly, monthly, or possibly annually, etc. and contain opportunities for advertising and/or sponsorships.

1-6 200 DEFINITIONS

1-6 201 Email Newsletter

Content formatted electronically, prepared by or for a group or institution, generally about one main topic that is of interest to its subscribers and is distributed through email.

1-6 202 Gross Attempted

The sum total of all unique email addresses for which a message delivery was attempted within a mailing, including the successful recipients and the undeliverable addresses.

Net deliverables – The total unique email addresses to which a message was successfully delivered.

1-6 203 Hard Bounce

A server response indicating an undeliverable email message usually due to an invalid email address or an expired address. A hard bounce may also occur if the receiving mail server has been configured to block all mail from the sender's domain. Hard bounces are permanent for that address unless there is a deliberate change, and the address is later restored as valid.

1-6 204 Soft Bounce

A server response indicating an email is undeliverable to the recipient. It is usually due to an email address which is temporarily unable to receive email. A soft bounce may occur if the receiving mail server is under maintenance or temporarily offline/inaccessible. Soft bounces are considered temporary for that address, but if a soft bounce persists for more than 90 consecutive days, it is considered the same as a hard bounce since the situation is not temporary.

1-6 205 SMTP (Simple Mail Transfer Protocol) Log File

Created when transactions between servers during the sending and receipt process are recorded. The log file shall show all of the email addresses that were sent the message, the date/time of the distribution, and the delivery status for each address. There shall also be a clear means to identify the specific email product issue for the distribution in the log file.

1-6 206 Opt-In

An action in which permission is expressly granted by a recipient of newsletters/alerts/mailings to receive such communication or information until they opt-out.

1-6 207 Opt-Out

An action in which permission is expressly denied by a recipient of newsletters/alerts/mailings that prohibits any further communication or information from the media owner.

1-6 208 Undelivered

An email that was not received by the intended recipient due to a hard bounce.

1-6 209 Undeliverables

The total unique email addresses to which a message could not be successfully delivered.

1-6 210 Unique Open Rate

A measure of how many people “viewed” or “opened” an email message. It may be reported as a whole number and/or expressed as a percentage (See 1-6 302).

1-6 211 Unsubscribed

An email recipient who has communicated they wish to stop receiving an email alert/newsletter, etc.

1-6 300 EMAIL NEWSLETTER REPORT – GENERAL

1-6 301

Email Newsletter media owners shall report their distribution in formats approved by the Corporation.

Email Newsletter media owners may release standalone Audit Reports, or elect to release the data within a BPA Brand Report.

The filing of the email newsletter distribution/deployment data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, distribution data and other data, in any form and manner authorized by the Board of Directors.

1-6 302

Email Newsletter members shall report the average number of net delivered newsletters and qualified paid and non-paid distribution separately.

Email newsletter media owners may report unique open rate and/or percentage of opens.

Email newsletters reported in a standalone format shall also report the average gross deliverables, net deliverables, and net undelivered with corresponding percentage of each. When reporting on brand reports, only the average net delivered shall be reported.

If newsletters are paid, the average subscription price for the period shall be reported in the explanatory paragraph, Additional Data.

1-6 303

Email newsletter subscribers shall be counted only once in the distribution list.

1-6 304

Recipients shall be given the opportunity to opt out of receiving newsletters.

1-6 305

A member may not claim nor imply that BPA Worldwide audits readership or intent to read.

1-6 306

In the interests of uniformity in appearance and typographical setup of the BPA Worldwide Brand Reports, newsletter brand reports and audit reports, BPA Worldwide will process all paragraphs which require special typesetting, ruling and extra pages. Where additional costs are incurred in setting up special paragraphs the publication media owner shall be billed those costs.

1-6 307

Printed copies of Brand reports, newsletter reports and audit reports may be purchased by a member of the Corporation at a price established by the Board of Directors.

1-6 308

All language and terminology shall be factual and auditable.

1-6 309

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards.

1-6 310

In the event of a disagreement with a decision of the CEO of BPA, an email newsletter owner may request a hearing before an appropriate committee of the Board of Directors.

1-6 311 EMAIL NEWSLETTER MEMBERS – STANDALONE REPORT FILING REQUIREMENTS

Media owners will release an annual audit report each year as follows:

A twelve-month distribution report for the period January - December inclusive, which is the basis for the annual audit report.

Or alternatively: A twelve-month distribution report for the period July - June inclusive, which is the basis for the annual audit report.

Or alternately, any other standard reporting period used by BPA.

The claims will be checked and released as audit reports and may be incorporated within a Brand report upon receipt and completion of processing.

An email newsletter applicant, that has chosen a period ended with a month other than June or December for its initial audit report, shall transfer to the standard June or December schedule with its first distribution report following the initial audit report and include whatever previously audited distribution/deployments are necessary to complete the audit period.

1-6 312

The reported claims as outlined in the preceding sections shall be filed with the Corporation within 15 days after the period which they cover. Email newsletter members reporting 50% or more average qualified paid circulation shall be granted a 15 day extension to this date.

No member shall be granted an extension of time to file except with the consent of the CEO of BPA, who shall not grant an extension greater than 30 days for members reporting less than 50% average paid circulation or 45 days for members reporting 50% or more average qualified paid circulation without member showing that the filing delay is a result of extenuating circumstances clearly beyond the member's control.

Failure to file claims on or before the due date or the end date of an authorized extension shall result in a suspension of services to the member and will subject member to disciplinary action as outlined in Section B9.0 of the Bylaws.

At any time after the end date of an authorized extension, if the required claims have not been filed, BPA Worldwide shall post an advisory to the BPA Worldwide website notifying the membership of the email newsletter's failure to file. All costs incurred in creating and posting an advisory, if any, shall be paid for by the subject email newsletter member.

No later than 60 days after the close of each reporting period, the BPA Worldwide website will display the status of production for each distribution report that has not been posted to the website. For example, status reports for brand reports with the period ended June will be posted September 1st. These status reports will only include standard terminology approved by the Board of Directors. The previous period's report would be moved to "history" at this time.

When claims are received by BPA Worldwide 1 – 14 days after the stated due date and a proof copy created, the member shall advise BPA of the acceptance of the proof copy within 10 business days after the proof copy has been issued. Reports received 15+ days after the stated due date shall have 5 business days to accept the proof. However, for members filing claims prior to the stated due date and receiving a proof copy before the stated due date, the counting of business days for the acceptance process shall commence with the filing due date and not from the date the proof copy was created. For all others, final approval shall be received within 20 business days of receipt of the first proof. The CEO of BPA shall not grant an extension without a member showing that the delay in approving the proof copy is a result of extenuating circumstances clearly beyond the member's control.

Failure to advise BPA of the acceptance of the proof copy by this date shall result in suspension of services to the member and will subject said member to disciplinary action as outlined in Section B9.0 of the Bylaws. BPA Worldwide shall post an advisory on its website, notifying the membership of the member's failure to approve the proof copy. All costs incurred in creating and posting an advisory to the website, if any, shall be paid for by the subject member.

1-6 400 EMAIL NEWSLETTER REPORT CONTENTS – STANDALONE REPORT

1-6 401 Reporting Requirements for Standalone Reports

The following standards apply to email newsletters reporting in a standalone report. (For email newsletters reported on Brand Reports, see the full Brand Audit standards for further requirements.)

1-6 402 Name of Email Newsletter

The first page of a standalone email newsletter report shall contain the name of the Email newsletter; publishing company; principal telephone number; fax number; email address; Web site URL; address of media owner; year the newsletter was established, and number of issues per year.

1-6 403 Email Newsletter Name Change

A media owner shall notify BPA Worldwide of any change in the name of their newsletter. At this time the media owner shall declare whether or not they wish to change the date the newsletter was established.

The CEO of BPA will determine if a name change requires a new application for membership.

1-6 404 Purpose Statement

Shall contain a standard paragraph to explain that the BPA Worldwide Email Newsletter Audit Report provides an independently verified summary of the distribution for the newsletter and the primary objective of the report is to present circulation and marketing information in auditable terms.

1-6 405 Statement of Distribution

Shall contain general information describing the nature of the distribution and who the recipients are.

1-6 406 Field Served and Definition of Recipient Qualification

Shall contain a factual statement by the email newsletter member describing in auditable terms the standards or qualifications employed by the media owner in determining who will receive the newsletter. Paid subscribers may be a standard to establish qualification.

Qualification standards may be optionally reported in a breakout within the report. Only recipients who conform to these standards and their demographic data (if reported) is no older than 36 months shall be counted as qualified within the report.

1-6 407 Limits of Details Included in 1-6 406 above

Field Served and Definition of Recipient Qualification may NOT contain any reference to:

Requests to receive the newsletter

Recipient's reading or intent to read the email newsletter

Recipient's buying authority or influence, unless supported by auditable documentary evidence. Questionnaire forms used to elicit buying authority or influence shall be submitted to BPA Worldwide for approval.

Any claim that all people of a certain category receive the newsletter

Job function, unless supported by auditable documentary evidence

1-6 408 Glossary of Terms

The following glossary table of terms is included in standalone reports:

Gross Attempts: Total number of emails sent out after unsubscribes have been removed from the mailing list.

Net Deliverables: Gross attempts-figures less undelivered recipients.

Unsubscribed: Recipients who have requested to be removed from the file.

Undelivered: If an email to a qualified subscriber (paid and non-paid) is undeliverable, and information of such is sent back to the email service provider that sent it, the email is defined as a "bounce". A bounce is classified as either "hard" or "soft."

- Hard bounces are the failed delivery of email due to a permanent reason, such as a nonexistent address.
- Soft bounces are the failed delivery of email due to a temporary issue, such as a full inbox or an unavailable ISP server.

All bounces are counted as "Undelivered".

1-6 409 Average Deliverable for the Period

Shall report the average gross deliverables, net deliverables, and net undelivered with corresponding percentage of each. In the standalone report, this table is located on the first page. On a Brand report, this data is located in the Executive Summary.

1-6 410 Reporting Requirements for STANDALONE and/or BRAND REPORTS

The following standards apply to email newsletters reporting either in a standalone report or included in a Brand Report.

1-6 411 Report Details

Shall report the total net delivered email newsletters for each issue.

A standalone report will display the data on the first page of the report. On a Brand report, this data will be included in the optional Frequency table and required in the email newsletter channel profile section of the Brand report.

For frequency reporting, daily emails may be reported daily or as weekly or monthly averages. Weekly newsletters may be reported each week (actual total each week) or a monthly average, and monthly email distribution should be reported as net total for each month.

The channel profile section of a Brand Report may report daily and weekly email newsletters by weekly or monthly average.

1-6 412 Demographic Profile of Recipients (Optional):

Media owners can optionally report the demographic profile of Email newsletter recipients. Only classifications included in the Field Served and Definition of Recipient Qualification may be included in the qualified circulation breakout. Proof of demographic classification as reported shall be available for all those claimed. This proof may be no older than 36 months from the date of the issue analyzed.

The analysis of the data shall be of the May/November email distribution/deployment. A report for the six-month period ended June would analyze the May email distribution/deployment while a report for the six-month period ended December would analyze the November email distribution/deployment.

Media owners having more than one email distribution/deployment per month shall analyze any distribution/deployment in May and November. If no email distribution/deployments occur in May or November, the issue analyzed shall be any email distribution/deployment closest to May and November (media owner may choose).

In an initial audit, the email distribution/deployment analyzed shall be one that has been published within the last two months of the audit period.

1-6 413 Appearance of Demographic Table

Business and industry classifications may be listed vertically in the left-hand column of this paragraph if or when reported. Classifications by size, volume, job titles or job functions may be listed in one of the following ways:

Horizontally in a cross-tabulation breakout

Vertically in the left hand column

Separately

As a subdivision of a business or industry classification

1-6 414 Geographical Breakout of Qualified Distribution/Deployment (optional)

If reported, shall contain an analysis (count and percentage) of the qualified distribution/deployment by geographic region. Email Newsletter recipients who do not provide a physical land address shall be reported as "email address only."

Regions representing 0-4.9% shall report database records by the geographic areas listed in Section "e" of this Standard.

Regions with 5.0% - 24.9% shall report by country. Standard country breakouts are available for each region.

Countries with 25%+ shall report records by state/province or other agreed upon market geographic breakdown within any one country, using standard BPA Worldwide tables (Canada, China, United Arab Emirates, United Kingdom, and the United States, available within BPA's on-line filing system website).

Where BPA Worldwide has not published a standard table and a database has over 25% of Worldwide will work with the media owners in the market to establish a standard table.

(a) For distribution/deployment in the United States, the geographic table will report the following regional breakout which is consistent with that of the U.S. Bureau of Census:

New England	East South Central
Middle Atlantic	West South Central
East North Central	Mountain
West North Central	Pacific
South Atlantic	

In addition, U.S. Territories, Canada, Mexico, Other International, APO/FPO addressed copies shall be reported.

- (b) For regional reporting of distribution/deployment in Canada, the geographic table will report the following:

Newfoundland	Ontario
Prince Edward Island	Manitoba
Nova Scotia	Saskatchewan
New Brunswick	Alberta, N.W.T. and Nunavut
Quebec	B.C. and Yukon

- (c) For distribution/deployment in the United Kingdom, it is sufficient to solely report “United Kingdom” in the table.

Media owners may elect to report distribution/deployment in the United Kingdom by region using the following breakout:

Northern	Scotland
Yorkshire & Humberside	Wales
North West	East Anglia
East Midlands	Greater London
West Midlands	South East
Northern Ireland	South West

- (d) For regional reporting of distribution/deployment in China, the geographic table will report the following which is consistent with the People’s Republic of China Administrative Standard Regions:

Northeast	East China
North China	Central South
Northwest	Southwest
Other	

Members reporting more granular than regional distribution/deployment within the People’s Republic of China shall report by province/city using the BPA Worldwide standardized breakout.

- (e) International distribution/deployment shall be reported using the following regional breakout:

Asia	Caribbean
MENA (Middle East North Africa)	Central America
Europe	South America
Africa	Asia Pacific
North America	

1-6 415 Optional Map

In addition to reporting the standard geographic table, members have the option of including a map to graphically display their distribution/deployment.

1-6 416 Explanatory Paragraph –Additional Data

Shall contain any additional explanatory information necessary to supplement facts reported elsewhere in the report.

Only data approved by the CEO of BPA shall be shown in this paragraph.

1-6 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-6 501 General

An electronic file of all names on the distribution list for the issue analyzed shall be available.

1-6 502

A physical count of the distribution list may be made by geographical distribution, and by the demographic classifications claimed in the demographic table, including the date the demographic data was obtained.

1-6 503

All records supporting successful delivery of email newsletters and non-qualified bounced or non-delivered distribution shall be maintained and shall be available to BPA Worldwide.

Records required for the audit include:

Proof of distribution to cover the total number of recipients on the distribution list provided by the media owner for each email newsletter reported in the period.

Proof of distribution shall be in the form of Simple Mail Transfer Protocol (SMTP) log files, or third-party distribution reports, which contain all the data of SMTP logs.

Summary reports of alerts and distribution/downloads shall be provided for every issue in the audited period.

A report indicating the number of unsubscribed or disabled (bounced) subscribers shall be provided (See 1-6 408).

1-6 504

The classification count (by types of classifications) shall be compiled by state or other geographical area unless otherwise provided for by the CEO of BPA. Suitable forms for the tabulation of these counts will be supplied by the Corporation.

1-6 505

Copies of all email newsletters and corresponding alert notifications and solicitations shall be available and provided for every issue in the audited period.

1-6 506

If a media owner opts to report "opened" data, statistical reports and other supporting documentation detailing the last issue opened for all "opened" data shall be provided. All documentation shall meet the approval of the auditor.

1-6 507

The auditor will compare and cross-check all records and make any other tests deemed necessary to verify the authenticity of the data.

1-6 508

Compliance testing shall be completed by the auditor to verify all demographic information reported.

1-6 509

Any other records deemed necessary by the Corporation in the fulfillment of its service shall be made available.

1-6 510

All records necessary for the verification shall be retained by the media owner and made available to the corporation upon request.

NEWSPAPERS

1-7 Canadian Community Newspaper Standards

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CANADIAN COMMUNITY NEWSPAPER STANDARDS

1-7 100 ELIGIBILITY

A newspaper applying for membership shall qualify as stated in Section B2.0 of the Bylaws, and shall conform to the following requirements:

It may be a community or ethnic newspaper.

The newspaper shall maintain continuity of style, format, subject or theme from issue to issue.

It shall publish for a minimum period of three months before being eligible for an initial audit, subject to the approval of the CEO of BPA.

It shall be a newspaper which includes advertising.

1-7 101 Extra Editions

When a newspaper has extra editions, (See 1-7 215), the CEO of BPA shall determine whether the newspaper is a single newspaper or is, in effect, two or more separate newspapers requiring separate memberships and separate Brand Reports and Audit Reports for each edition on the basis of the following conditions:

The extra edition is distributed to all or a specifically designated portion of the circulation list of the regular newspaper.

The extra edition is identified on its cover as a special issue of the primary newspaper.

If, after consideration of the above conditions, the CEO of BPA determines that the newspaper is, in effect, a single newspaper, the CEO of BPA shall require the newspaper to report the extra edition in paragraph 3 of the Brand Report and Audit Report, but not in paragraph 1 if the extra issue is distributed to less than the identical circulation list as that of the regular newspaper and a suitable explanation shall be made in paragraph 10 subject to audit.

1-7 102 Separate Editions

When a newspaper has separate editions such as Total Market Coverage (TMC), Extended Market Coverage (EMC), demographic or geographic, the CEO of BPA shall determine whether the newspaper is a single newspaper or is, in effect, two or more separate newspapers requiring separate memberships, Brand Reports and Audit Reports for each edition.

In order to qualify as a single newspaper, the separate editions shall meet all of the following conditions:

Shall have the same Statement of Publishing and Circulation Policy.

Shall have the same editorial scope with only such variations in editorial matter required by the different demographic or geographic audience served.

The editions shall be identified separately on advertising rate source material.

If, after consideration of the above conditions, the CEO of BPA determines that the newspaper is, in effect, a single newspaper, the media owner will be given the option to report the circulations for each edition separately. If the media owner opts to report each edition separately, the media owner shall report such editions separately in paragraphs 1, 3, 4 and 5 of the Brand Report and Audit Report.

When the CEO of BPA determines that the newspaper is, in effect, a single newspaper, but the media owner wishes separate Brand Reports and Audit Reports for each edition, separate memberships will be required.

1-7 103 Supplements

When a newspaper has a supplement, the CEO of BPA shall determine whether the newspaper is a single qualified newspaper or is, in effect, two or more separate newspapers requiring separate memberships, Brand Reports and Audit Reports for each newspaper. In order to qualify as a single newspaper, the host newspaper and the supplement shall meet all of the following conditions:

The supplement shall serve the same field as the host newspaper.

The qualified recipients on the lists shall be in the same market. The supplement's recipients may be a subset of the host newspaper's qualified recipients.

The supplement shall be identified separately on advertising rate source material and in circulation promotion. In advertising rate source material, separate reference to each supplement's frequency, issuance and closing dates is required.

If, after consideration of the above conditions, the CEO of BPA determines that the newspaper is, in effect, a single newspaper, the media owner will be given the option to report the circulation at the end of the host newspaper's Brand Report.

If the frequency of the supplement does not give cause to publish the supplement with the analyzed issue, and the media owner opts to report the supplement in the host newspaper's Brand Report, additional audit procedures may be required of the issue, which includes the supplement.

When the CEO of BPA determines that the newspaper is, in effect, a single newspaper, but the media owner wishes separate Brand Reports and Audit Reports for each supplement, separate memberships will be required.

1-7 200 DEFINITIONS AND REPORTING REQUIREMENTS

1-7 201 Advanced Renewals

A subscription renewed prior to expiration date of previous subscription.

1-7 202 Advertiser and Agency Copies

Includes checking copies and prospective advertising copies and shall be reported as non-qualified distribution.

1-7 203 Arrears (Post Expire Copies Included In Qualified Paid Circulation)

Subscriptions retained on the list up to three months after expiration date and reported as paid. An average number of arrears copies for the period, expressed as a percentage, shall be reported in paragraph 8.

Bulk subscriptions cannot be reported as paid circulation after the expiration dates.

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration date for domestic circulation and six months after the expiration date for international circulation.

1-7 204 Audit Report

An annual or biennial report released by the corporation consolidating circulation data during the audit period. The Audit Report attests to the accuracy and validity of the media owner's circulation claims:

Newspapers with average paid circulation less than 25,000 are audited bi-annually. Newspapers with average paid circulation of 25,000 or greater are audited annually.

1-7 205 Back Copies

Any issue of the newspaper dated prior to the current issue shall be considered a back copy whether served to a new or renewed recipient. The “current issue” is defined as the most recent issue mailed or placed on sale, whichever comes first.

Back copies may be counted as either qualified paid or non-paid circulation only for two issues newspapers with a frequency of weekly or greater.

When the recipient has specifically requested back copies of a newspaper such copies may be counted as qualified circulation up to three issues preceding the date of the subscription order for all newspapers.

1-7 206 Base Prices

Base Price - The established prices for each subscription term as defined in the masthead of a newspaper.

Recognized base prices:

Subscriptions: one base price for each regularly established duration in each city zone, retail trading zone, designated market, Metropolitan Statistical Area (MSA)/Census Metropolitan Area (CMA), and other.

Mail subscriptions: one base price for domestic mail subscriptions and one base price for international mail subscriptions.

Single Copy Sales: one base price for each city zone, retail trading zone, designated market, MSA/CMA, and other.

Market Segment circulation: only one base price may exist for city zone, retail trading zone, and other.

National newspapers may establish three geographic based price zones. Each price zone shall have the pricing options listed above.

1-7 207 Bulk

Four or more copies of the print version of the newspaper sent to a single addressee. This circulation shall be reported separately in paragraphs 1, 3, 4, and 5 of the Brand Report.

Only one copy of an electronic version may be considered qualified circulation per single addressee.

If the copies are purchased and the purchaser has a financial interest in the newspaper, those copies purchased may not be included in qualified circulation unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the purchaser and not for the benefit of the newspaper.

Money collected from an agent for bulk subscriptions to the same addressee need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscribers or sponsor. However, each sponsorship/third-party sale transaction must be without monetary recourse to the purchaser.

Bulk subscriptions cannot be reported as paid circulation after the expiration date.

If the number of subscriptions involved in any one bulk sale exceeds 5% of the total average paid subscription claim for the period in which the transaction takes place, the subscriptions involved in that sale shall be fully explained in Paragraph 10, Additional Data.

Multiple copies distributed to public places for redistribution to consumers shall be reported as bulk circulation. Such distribution includes, street racks, entranceways of apartment complexes, etc. Records must be kept on an issue-by-issue basis to show distribution.

1-7 208 Carrier Delivery

Newspapers delivered by individuals; not the national postal service.

1-7 209 Combined Sales

Subscriptions to multiple newspapers or newspapers and products or services sold at a special rate.

Comment shall be made in paragraph 10 providing details of the number of copies of each newspaper sold in combination with another newspaper/product/service.

A media owner may disclose the price of each item of the combination sale or simply the value of the newspaper subscription. If this option is chosen, the disclosed value of the newspaper subscription shall be the price used. The disclosed value cannot be in excess of the total price to be paid for the entire package offered.

In the absence of individual item or newspaper price disclosures, the value of the subscription will be calculated as follows:

In order to determine the value of the subscription you shall first sum the recognized retail value (base value) of all the individual elements of the combination offer. The ratio of the bundled offer price to the sum of the individual elements determines the discount rate.

Example offer:

12 issue subscription to XYZ (base rate \$20.00)
1 widget (base value \$15.00)
3 Months Risk Free access to a Web site (base value \$25.00)
Combination Rate: \$25.00

Calculation: $\$20.00 + \$15.00 + \$25.00 = \60.00

Offer: $\$25.00 / \$60.00 = 41.6\%$

Discounted Newspaper Price: $.416 \times \$20.00 = \8.33

1-7 210 Electronic Edition (E-Editions)

Electronic Editions – A newspaper (either with a companion print version or as a standalone electronic product) delivered periodically in a digital format with metered (i.e. linear) navigation, that is edited, designed, and contains date-stamped content that includes advertising (but not necessarily the same advertising as might appear in a print version). Though editing, design, and issue identification (i.e. date-stamped content) are significant differences, the primary distinction between an electronic editions and a website is the metering (this can be pagination or any other method of going through the issue from beginning to end).

An electronic edition may be dynamically created, have targeted content, or may exist in parallel with pre-existing media.

Dynamic – Editorial can be created and/or selected at point of delivery. Each recipient may receive a copy with different content and that content can change at any time.

Targeted – Editorial is changed for specifically defined groups and/or platforms before point of delivery. Each group of recipients, whether they are segmented demographically or because of the platform they use to receive the electronic product, receive a copy with different content specifically selected for that group. Apart from minor updates, the content cannot change once the issue is made available.

Enhanced – If a print brand existed first, “enhanced” is editorial that is retained from the original edition and is redesigned and/or supplemented. Each issue’s content is primarily taken (but not necessarily replicated in its entirety) from the original edition (whether in print or electronic). Apart from minor updates, the content cannot change once the issue is made available.

Replica – If a print brand existed first, editorial and design are unchanged from the original print edition. Each issue’s content and design are identical to the original edition. Apart from minor updates, the content cannot change once the issue is made available.

Media owners shall disclose in brand reports under a “Statement of Content Platform” the form or combination of forms of electronic edition used per the above definition/description.

Media owners may report digital magazines by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

Multiple pages of content that are distributed electronically as a unit. The electronic edition shall be a replica of the print version in terms of editorial (not advertising), subject to the standards governing separate editions and the approval of the CEO of BPA.

Circulation for electronic editions shall be audited to ensure the systems of the media owner and their vendor(s) are in compliance with BPA Worldwide standards and policies before such data may appear on a Brand Report. A special audit may be undertaken to verify the electronic distribution.

Electronic editions shall be reported as “electronic editions” distribution throughout the audit report.

Non-qualified electronic edition copies shall not be reported on BPA Worldwide circulation audit reports.

Electronic Edition Site License: A contract or agreement between a media owner member and company/organization/ association/education establishment to provide multiple individuals access to an electronic edition of the newspaper hosted on the subscribing organization’s intranet. The contract/ agreement shall require the subscriber/administrator of the site license notify all the individual seats (individuals) of the availability of each issue. Licenses may be reported for definitive amount of seats only, “global” or “companywide” license agreements may not be reported.

Paid site licenses shall adhere to standard 1-7 229 qualified paid circulation.

Non-paid site licenses shall adhere to qualified non-paid circulation standard 1-7 228.

The media owner shall disclose in the explanatory paragraph, Additional Data the number of authorized Electronic Edition Site Licenses and Seats (individuals) served as part of the license, including paid and non-paid data. Reporting the name of the company to which the content has been licensed shall be optional. Licenses may be reported for definitive amounts only, “global” or “companywide” license agreements may not be reported.

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

If the average electronic circulation is equal to or greater than 5% of the average paid circulation for the period, the electronic circulation shall be detailed separately throughout the report. Individuals receiving print, electronic, and both the print and electronic 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 electronic versions.

If an alert or notification is sent to a subscriber indicating the electronic copy is available for downloads 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 electronic version copies shall not be reported on BPA Worldwide brand reports and audit reports.

(a) Members may elect to report the following usage/engagement metrics:

Active Views:

- A) An active view is defined as a single copy of a publication actively opened by a device for viewing.
- B) A minimum of one page of an issue opened/served onto a device.
- C) There must be a distinct action/event by the end user to view. A single action/request which results in both the content being downloaded/made available and the automatic opening of a page of the publication is not considered a distinct action/event. A further distinct action would be required such as opening a second page.
- D) If reported, the active view shall be reported on an issue by issue basis.

Number of Sessions per issue: defined as the aggregate number of times an issue was accessed by all unique browsers (individual devices).

Time Spent in Issue per Individual Device: defined as the time spent, on average, in the issue across all unique browsers (total audience).

Number of Sessions in Issue per Individual Device: defined as the average number of times each unique browser accesses the issue being reported.

Number of Pages Accessed: defined as the total unique pages accessed for each issue by unique browsers.

1-7 211 Boxes

Boxes used to distribute newspapers. Copies distributed via boxes that meet the definition of paid circulation shall be reported as single-copy sales (See 1-7 231). All other circulation shall be reported as Carrier Bulk – Boxes under non-paid bulk circulation.

1-7 212 Employee Copies

A newspaper may include in paid circulation copies served to employees, retired employees, correspondents and agents. Adequate records must be maintained by the newspaper, including: employee payrolls records of compensation paid to correspondents and agent billings.

1-7 213 Expiration Date

Terminating date of subscription.

1-7 214 Extension

Advancing the expiration date of a subscription because of a reduction in the frequency of issues or a reduction in the subscription price (See 1-7 518 to 1-7 521).

1-7 215 Extra Editions

Any issue in addition to the regular editions shall be considered an extra edition. The sales of extra editions shall be included in the circulation of the day for which they are dated. Details of the extra edition shall be reported in paragraph 10 (See 1-7 101).

1-7 216 Final Settlement Date

The date by which single copy sales accounts for an issue shall be closed after which copies may no longer be counted as paid.

The "final settlement" date may be no longer than 45 days from the on-sale date of the sub-sequent issue for domestic sales. If returns are received following the final settlement date, they shall be reported as unsold copies.

1-7 217 Gift Subscriptions

Purchased for persons other than the purchaser's employees.

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration date for domestic circulation and six months after the expiration date for international circulation (See 1-7 203).

Money collected by an agent need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor.)

1-7 218 Group Subscriptions

Purchased in lots of four or more, paid for by an employer for their employees and mailed by the media owner to individual addresses furnished by the employer. These subscriptions shall be reported in paragraph 9.

Copies purchased in lots of four or more, paid for by an employer for their employees and mailed by the media owner to the same addressee shall be reported as "Bulk".

Money collected by an agent need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor.)

1-7 219 Initial Audit Report

May be released for any consecutive three or six-month period. A newspaper shall transfer to the standard twelve-month reporting periods ended March with its first Brand Report following the initial audit and include whatever issues were previously audited during the period reported (See 1-7 305).

1-7 220 Mail Delivery

Newspapers delivered by the national postal service.

1-7 221 Membership Benefit Subscriptions

Deductible Membership Benefit Subscriptions - Individual subscriptions paid for out of membership dues where the recipient has the option of deducting the subscription price from their dues if they do not wish to receive the newspaper.

Non-Deductible Membership Benefit Subscriptions - Individual subscriptions paid for out of membership dues, where the recipient does not have the option of deducting the subscription price from their dues, and automatically receives the newspaper.

An annual membership communication, e.g. dues invoice, membership packet, promotional letter (deductible and non-deductible) offers shall clearly state the amount of dues allocated for payment of the subscription.

1-7 222 Newspapers in Education

Newspapers in Education: copies ordered for delivery to students or schools. Copies may be purchased individually, through classroom funds, or sponsored by a third party. A description of the media owner's Newspaper in Education program is to be detailed in Paragraph 10.

1-7 223 Non-Deductible Subscriptions

Individual subscription paid for as part of a reservation fee for conferences, meetings, seminars, etc., where the recipient does not have the option of deducting the subscription price and automatically receives the newspaper. The offer shall clearly state the amount of money allocated for payment of the subscription.

Paragraph 10 shall include a comment describing the offer and the number of copies so reported.

1-7 224 Non-Qualified Circulation

That circulation which fails to conform to the terms of the media owner Stated Publishing and Circulation Policy Statement” as stated on the front page of the Brand Report and the Audit Report.

This distribution is reported in paragraph 2.

1-7 225 Post Expiration Copies Included in Paid Circulation Up To Three Months - See: Arrears, Section 1-7 203

1-7 226 Promotional Incentive

Any inducement offered to a subscriber for free with their own subscription.

When subscriptions are sold with a promotional incentive, the value of the incentive cannot exceed 50% of the total offer price of the subscription(s).

The value of the promotional incentive is considered to be the actual cost to the media owner, or the recognized retail value, or the represented value, whichever is highest.

If a back copy is included in a subscription offer, it will be considered a promotional incentive unless the subscription is put on a retroactive basis.

Details regarding offers with promotional incentives shall be reported in paragraph 10 of the Brand Report.

For Single Copy Sales, a promotional incentive (cover mount) is any inducement offered by the last agent in the chain of distribution (point-of-purchase).

Any inducement attached to, or polybagged with, a single copy at the point-of-purchase is considered a promotional incentive (cover mount).

The promotion on the cover of a newspaper of an advertiser's coupon within the newspaper is not considered a promotional incentive.

When single copies are sold with a promotional incentive, the value of the incentive cannot exceed 50% of the cover price. The value of the promotional incentive is considered to be the actual cost to the media owner or the recognized retail value or represented value, whichever is highest.

Single copies sold in Europe with a promotional incentive (cover mount), shall report copies sold as “qualified paid,” regardless of the value of the promotional incentive offered.

During a temporary study period single copies and subscriptions sold in the Middle East with a promotional incentive shall report the subscription as “qualified paid,” regardless of the value of the promotional incentive.

Details regarding promotional incentive offers and the number of single copy sales sold with a promotional incentive shall be reported in paragraph 10 of the Brand Report.

Free promotional incentives, the contents of which have been published either in print or electronic medium, are reported as "sold with editorial promotional incentive (including reprints)."

Editorial promotional incentives include:

- reprints of newspaper sections,
- books,

other printed reference matter (paid annual periodicals excluded),
pamphlets,
disks containing items such as compilations of newspaper editorials, software demonstrations, clip art, fonts, etc.

For additional standards regarding services or products sold in combination with a newspaper, see standards regarding Combined Sales, Section 1-7 209.

1-7 227 Qualified Circulation

That circulation that conforms to the terms of the Statement of Publishing and Circulation Policy and is verified by auditable documentary evidence.

Individuals receiving copies of an electronic version, may only be considered as qualified circulation if such copies are elicited through either personal or company request.

1-7 228 Qualified Non-Paid Circulation

That circulation which meets the requirements of the above definition and which is distributed free of charge to the recipient.

1-7 229 Qualified Paid Subscription Circulation

That circulation which is not for resale, meets the above definition for qualification and the requirements listed below.

Subscription payment orders shall conform to the following conditions:

It may be paid for at any price, and shall not be free of charge.

A subscription for less than one year, the price of which was less than 50% of the base annual price, cannot be served copies after the expiration date.

Payment shall not be delinquent for more than six months after the beginning of the subscription service.

A subscription that is ordered for which no payment had been received is considered a credit subscription. A credit subscription shall be counted as paid circulation up to six months from the date of the first issue served. If payment for such subscriptions has not been received within six months from the date of the first issue served, such copies shall be deducted from the qualified paid circulation for all copies served during this period.

A subscription sold on a “renew until forbid” basis may be reported as paid circulation until the subscriber cancels. All copies served from the moment the consumer cancels the subscription until the media owner receives notification of the cancellation, shall be reported as paid circulation as long as the media owner receives payment for the issues served (either from the consumer or agent). If the media owner is debited for unpaid copies served, then only the copies served which meets the arrears criteria may be reported in paid circulation (See Arrears, Section 1-7 203).

No promotional incentive or other inducement may be offered which has an advertised value, or cost to the media owner of more than 50% of the subscription offer price.

Subscriptions sold with an advertising contract shall be paid in addition to the regular advertising contract; and shall give the advertiser the option of deducting the subscription price from the contract if they do not wish to receive the newspaper.

- (a) Subscriptions sold via the redemption of affinity program points, e.g. frequent flyer miles, loyalty program points, etc., shall adhere to the following:

Participants shall elect to participate in the program;

The earning of miles, points, etc., shall be transaction based. For example, points earned for credit card purchase/borrowing activity and purchase of air travel, hotel stays, or car rentals, etc. qualify. Points earned without transaction activity (no financial transaction occurs) do not qualify for redemption as paid circulation.

Points shall be accruable towards future redemption's.

Points awarded upon enrollment shall be less than 50% of the lowest valued product/service offered in the program.

All affinity point programs shall offer non-newspaper products/services. Newspapers may not represent more than 75% of each program.

The value of all products and services shall be disclosed, in both monetary values and points.

The value of non-newspaper products/ services shall be equal to or greater than the lowest valued newspaper.

The redeemable units of measure, e.g. miles, shall have a recognizable and accepted monetary value.

Adequate documentation of the transfer or redemption of the units of measure, e.g. frequent flyer miles, shall be made available to the audit staff.

The CEO of BPA shall have final approval of all affinity programs prior to acceptance for use in obtaining qualified paid circulation.

- (b) Copies exchanged for goods or services, or sold without using money (barter) may be claimed as qualified paid (barter) circulation providing:

The requirements relating to qualified paid circulation have been met.

The goods and services exchanged must have been sold in the public domain over the last twelve months and have a clearly identifiable and established market value.

The media owner is in possession of a written agreement with the purchaser, supported by invoiced transactions showing the quantities of copies/goods and services bartered and their value.

The media owner has provided proof that the barter transactions have been recorded in the publishing company's accounting system and subsequent financial statements.

The value of the copies sold is not subsequently redeemed by free advertising.

The goods or services provided in exchange for the publication are not related to the supply of the publication (e.g. costs for distribution or marketing of the publication).

1-7 230 Qualified Recipients

Recipients who meet the circulation terms of recipient qualification in the Statement of Publishing and Circulation Policy Statement (See 1-7 407).

1-7 231 Single Copy Sales

Those copies of a newspaper sold through newsstands and other retail outlets and reported as qualified circulation throughout a BPA Worldwide Newspaper Audit Brand Report or Audit Report. These sales shall be reported separately in paragraphs 1, 3, and 5 (if reported).

For auditing single copy sales, final settlement figures shall be available for at least half the issues in the period. The balance of issues may be projected based on historical average of the settled issues.

Single Copy Sales shall conform to the following conditions:

Copies shall be paid for by the last agent in the chain of distribution (point-of-purchase) at any price and payment shall be remitted to the media owner by the final settlement date (See 1-7 216).

Single Copy Sales - Non-returnable: The media owner shall provide signed affidavits from the last agent of sale, supporting the number of copies sold to consumers.

If a media owner does not wish to collect non-returnable single copy sale affidavits they may use the following formula:

The total possible sale (draw) shall be reduced by a prorated amount calculated on the basis of whatever discounted price is actually remitted by the agent at point-of-purchase. The total amount paid to the media owner from the vendor shall be divided by the cover price to yield copies "sold".

For example, a media owner allows a 50% discount off cover price for vendors on a non-returnable system. If the vendor draws 100 copies at 50% of the \$.50 cover price, \$25.00 would be paid to the media owner. Dividing this by the \$.50 cover price yields 50 copies that may be claimed as "single copy sales".

No promotional incentive or other inducement may be offered which has a recognized retail value or represented value, or cost to the media owner, of more than 50% of the newspaper's suggested retail cover price (See 1-7 226).

1-7 232 Single Copy Sales (Bulk)

Copies of an issue purchased in quantities of four or more which, promote the interest of the purchaser and otherwise conform to the definition of qualified paid circulation shall be reported as Single Copy Sales in paragraph 1, identified separately in paragraph 5 and shown on an issue-by-issue basis in paragraph 10.

Money collected by an agent need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship – third-party sale transaction must be without monetary recourse to the media owner.

1-7 233 Single Copy Sales (Non-Returnable)

Copies provided to wholesalers/retailers for resale for which returns will not be accepted, shall be reported as Single Copy Sales in paragraph 1, identified separately in paragraph 5. Particulars of individual sales representing 5% or more of the average single copy sales for the period reported shall be shown in paragraph 10.

1-7 234 Sponsored/Third-Party Circulation

Circulation which promotes the interests of the sponsor/donor and which otherwise conforms to the definition of qualified paid circulation shall be reported in Paragraphs 1, 3, 5, and 9. This includes carrier, mail, electronic, bulk and single-copy sales.

If the purchaser has a financial interest in the newspaper, those copies purchased may not be included in qualified circulation unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the purchaser and not for the benefit of the newspaper.

Agents shall not be sponsors of subscriptions or single copies. Having a "Doing Business As" (DBA) name is not sufficient to establish an agent's DBA operation as a sponsor.

1-7 235 Statement of Content Platform

The Statement of Content Platform discloses the form or combination of forms of digital magazines/editions included in the qualified circulation. These are defined in the statement according to the appropriate definitions and descriptions that include: Dynamic, Targeted, Replica Plus, Editorial Replica, or Enhanced.

Media owners have the option to report digital magazines/editions by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

1-7 236 Subscriptions

Contractual agreement by an individual or a firm to purchase one or more copies of a newspaper for a given period at a price.

1-7 237 Suspension of Delivery Service

A subscriber may suspend service due to vacation or other reason. The subscriber may request a refund for the suspended copies, they may extend the subscription term for the same term as the suspension of service, or they may donate the value of the suspended copies to the media owner's newspapers in education program.

1-7 238 Sweepstakes, Prize Draws or Contests

Any subscription offer in which a prize is offered by lottery shall be considered as sold using a sweepstakes, prize draw or contest.

Details regarding these offers shall be reported in paragraph 7 of the-Brand Report.

1-7 239 Term of Subscription

Length of time a media owner contracts with a subscriber to send issues of the newspaper.

1-7 240 Third Party Agents

Subscriptions sold through agencies. The agency shall be a recognized business concern. It shall be the media owner's responsibility to provide proof of qualification for such recipients.

Money collected by an agency need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber.

1-7 241 Voluntary/Optional Paid Circulation

Payment is not required to receive the newspaper. Copies that have been voluntarily paid for are reported under paid circulation. Copies not paid for under a voluntary/optional paid program are to be reported with non-paid circulation.

1-7 300 BRAND REPORT - GENERAL

1-7 301

Media owner members shall report their circulation on forms supplied by the Corporation.

The filing of the media owner's circulation data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, circulation data and other data, in any form and manner authorized by the Board of Directors.

1-7 302

In the interests of uniformity in appearance and typographical setup of the BPA Worldwide Newspaper Brand Reports and Audit Reports, BPA Worldwide will process all paragraphs which require special typesetting, ruling and extra pages. Where additional costs are incurred in setting up special paragraphs the newspaper member shall be billed those costs.

1-7 303

Time required to process a Brand Report or Audit Report shall be charged for at a uniform flat rate to be set from time to time by the Board of Directors.

1-7 304

Media Owner Applicant - An applicant shall file a three or six month Brand Report as the basis for his initial audit for the consecutive three or six month period specified by the CEO of BPA during which qualified circulation has been practiced. Upon completion of the audit and approval by a majority of the Board of Directors, the media owner will be admitted to membership and the report shall be released as an initial Audit Report to Standard Rate and Data Service (SRDS) or Canadian Advertising Rates and Data (CARD), and/or British Rates and Data (BRAD) or other similar services and BPA Worldwide member

1-7 305

Media Owner Members – Canadian community newspapers members have the option to release one Brand Report each year for the twelve months ended March. Canadian community newspapers members have the option of filing an interim Report for the six-month period of April – September. The information will be checked and released as a Brand Report upon receipt and completion of processing.

Canadian Community Newspapers members shall file quarterly TRAC data for the periods of: January – March, April – June, July – September, and October – December. The Top-line circulation data shall report circulation for an analyzed issue for the following three categories: Total Non-Paid Individual Circulation; Total Non-Paid Bulk Circulation; and Total Paid Circulation. The analyzed issue shall be any issue published in the quarterly reporting period. Publishers shall report how the analyzed issue compares to the average of the other issues published in the period, expressed as a percentage. A comparison of circulation increases/decreases based on the same period from the prior year will be presented.

TRAC Reports and the Brand Reports form the basis for the Audit Report. The audit will be completed after the auditor's examination of the media owner's records.

The audit will be made in the media owner's office and/or wherever the records can be properly checked.

A newspaper applicant, which has chosen a period ended with a month other than March for its initial Audit Report, shall transfer to the standard March schedule following the initial Audit Report.

1-7 306

Reports as outlined in the preceding sections shall be filed with the Corporation within 30 days after the period, which they cover.

No member shall be granted an extension of time to file except with the consent of the CEO of BPA, who shall not grant an extension greater than 30 days, without a showing that the filing delay is a result of extenuating circumstances clearly beyond the newspaper member's control. Failure to file a report on or before the due date or the end date of an authorized extension shall result in a suspension of services to the newspaper member and will subject the newspaper member to disciplinary action as outlined in Section B9.0 of the Bylaws.

At any time after the end date of an authorized extension, if the required Brand Report has not been filed, BPA Worldwide shall post an advisory to the BPA Worldwide website notifying the membership of the newspaper's failure to file. All costs incurred in creating and posting an advisory, if any, shall be paid for by the subject newspaper member.

No later than 60 days after the close of each reporting period, the web site, www.bpaww.com, will display the status of production for each Brand Report that has not been posted to the web site. The previous period's report would be moved to "history" at this time.

When a report is received by BPA Worldwide 1 – 14 days after the stated due date and a proof copy created, the media owner shall advise BPA of the acceptance of the proof copy within 10 business days after the proof copy has been issued. Reports received 15+ days after the stated due date shall have 5 business days to accept the proof. However, for media owner filing reports prior to the stated due date and receiving a proof copy before the stated due date, the counting of business days for the acceptance process shall commence with the filing due date and not from the date the proof copy was created. For all others, final approval shall be received within 20 business days of receipt of the first proof. The CEO of BPA shall not grant an extension without a showing that the delay in approving the proof copy is a result of extenuating circumstances clearly beyond the publication member's control.

Failure to advise BPA of the acceptance of the proof copy by this date shall result in suspension of services to the newspaper member and will subject the newspaper member to disciplinary action as outlined in Section B9.0 of the Bylaws. BPA Worldwide shall post an advisory on its website, notifying the membership of the newspaper's failure to approve the proof copy. All costs incurred in creating and posting an advisory to the website, if any, shall be paid for by the subject newspaper member.

All signatures on Brand Reports submitted to the Corporation shall be over the individual's type-written name and title.

1-7 307

The media owner has the option of submitting the special SRDS or CARD or BRAD or similar form supplied by BPA Worldwide and an additional copy of their six-month Brand Report. When the report has been processed, typeset and approved for printing by the media owner, the SRDS or CARD and/or BRAD or similar form will be forwarded by BPA Worldwide to Standard Rate and Data Service or Canadian Rates and Data and/or British Rates and Data or similar company for inclusion in its next issue.

The additional Brand Report which has been approved by BPA Worldwide will be returned to the media owner in advance of their printed copies for their use in preparing promotional material.

1-7 308

Printed copies of Brand Reports and Audit Reports may be purchased by a member of the Corporation at a price established by the Board of Directors.

1-7 309

All language and terminology shall be factual and auditable.

1-7 310

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards.

1-7 311

In the event of a disagreement with a decision of the CEO of BPA, a media owner member may request a hearing before an appropriate committee of the Board of Directors.

1-7 400 BRAND REPORT – CONTENTS

1-7 401

All language and terminology shall be factual and auditable. A member may not claim or imply that BPA Worldwide audits:

readership or intent to read;

recipient's buying authority or influence.

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards. In the event of a disagreement with a decision of the CEO of BPA, a media owner member may request a hearing before an appropriate committee of the Board of Directors.

1-7 402

All newspaper members are required to report their average qualified non-paid circulation and average qualified paid circulation separately in paragraph 1 of their Brand Report and Audit Report.

1-7 403

All newspaper members shall report their total qualified circulation in paragraphs 1, 3, 4, and 5, of the Brand Report. Paragraph 4 reports the average qualified circulation of previous periods.

Newspaper members shall report their qualified paid and non-paid circulation separately in paragraphs 1, 3, 4 and 5.

1-7 404

The first page of the report shall contain the name of the newspaper; publishing company; principal telephone number; fax number; email address; Web site URL; address of publishing company; whether or not an official membership benefit newspaper; and the year of newspaper's establishment; and FDSA (Flyer Distribution Standards Association) accreditation status.

1-7 405

A media owner member shall notify BPA Worldwide of any change in the name of their newspaper. At this time the media owner shall declare whether or not they wish to change the date the newspaper was established. Any change in the date of establishment should be consistent with the volume number appearing in the masthead of the newspaper. If the date of establishment and volume numbers are changed, the newspaper will be considered a new newspaper and subject to the standards requiring application for membership.

1-7 406

Whenever two or more newspapers are merged, the following comment shall appear in the upper left hand corner of two consecutive Brand Reports and one Audit Report:

Merged Newspaper -See Paragraph 10.

Paragraph 10 shall report the date of merger and other applicable information (See 1-7 517).

1-7 407 Statement of Publishing and Circulation Policy

Statement of Publishing and Circulation Policy shall contain a statement concerning the means of distribution of the newspaper and the terms of qualification. A regional newspaper shall include a description of the geographical area(s) served. Auditable documentary evidence shall be available to support the conformance to the terms of qualification. The description in this paragraph shall include all editions and the geographic areas covered by each edition.

If electronic version circulation exists, the method of distribution shall be fully disclosed within the "Statement of Publishing and Circulation Policy (See 1-7 210).

1-7 408

Statement of Publishing and Circulation Policy may NOT contain any reference to:

Requests to receive the newspaper.

Recipient's reading or intent to read the newspaper.

Any claim that all people of a certain category receive the newspaper.

A classification which is not reported in paragraph 5 of the report.

1-7 409

A member may not claim or imply that BPA Worldwide audits readership or intent to read (See 1-7 401).

1-7 410 Paragraph 1: Average Circulation for Period

All copies listed in this Section are directed to subscribers or recipients as stated in the Statement of Publishing and Circulation Policy (See 1-7 407).

Community and Ethnic Newspapers shall include:

A. Non-Paid Individual Circulation

Carrier Delivery – Residential
Delivery – Non-Residential
Mail Delivery
Electronic Editions

Total Non-Paid Individual Circulation

B. Non-Paid Bulk Circulation

Carrier Bulk - Residential
Carrier Bulk – Non Residential
Carrier Bulk – Boxes

Total Non-Paid Bulk Circulation

Total Non-Paid Circulation

C. Paid Circulation

Subscriptions
Carrier/Mail
Bulk
Single Copy Sales

Total Paid Circulation

Total Qualified Circulation

The average circulation of separate issues (or groupings of issues) can be reported in columnar format at the option of the media owner.

1-7 411 Paragraph 2: Average Non-Qualified Distribution Audited as to Quantity Only

This distribution is reported in paragraph 2 of the Brand Report as “In addition to the circulation the following average distribution is audited as to quantity only” and includes the following:

Advertisers, Agencies
Other

Non-qualified copies distributed by the media owner’s salespeople to prospects are reported within paragraph 2 of the Brand Report as “Advertiser and Agency Copies”.

“Other” would include copies which fail to conform to the terms of the “Statement of Publishing and Circulation Policy.”

1-7 412 Paragraph 3: Average Monthly Circulation

Community Newspapers:

Report the average monthly figures for the circulation as follows:

Non-Paid Circulation

Individual

Bulk

Total Non-Paid

Paid Circulation

Subscriptions

Single-copy Sales

Total Paid

Total Non-Paid and Paid Circulation

If the average electronic circulation is equal to or greater than 5% of the average paid circulation for the period, the electronic circulation shall be detailed separately throughout the report. Individuals receiving print, electronic, and both the print and electronic versions shall be included only once.

When averages of issues are reported in separate columns in Paragraph 1, the same issue groupings shall each be reported in Paragraph 3.

1-7 413 Paragraph 4: Average Audited Circulation (end of previous audit)

Shall report the total audited average qualified circulation for the preceding three audit periods, including:

Non-Paid Individual Circulation, Non-Paid Bulk Circulation and Paid Circulation. Qualified Electronic version and Qualified Print Version circulation shall be reported separately if applicable.

When audited, averages of issues are reported in separate columns in Paragraph 1, the same issue groupings shall each be reported in Paragraph 4.

1-7 414 Paragraph 5: Analysis of Circulation

Shall contain a breakout of a specific issue for Community and Ethnic Newspapers.

The specific issue shall be any issue in February on the March Brand Report and any issue in August on the September Brand Report.

When averages of issues are reported in separate columns in paragraph 1, the same issue groupings shall each be reported in paragraph 5.

(a) City Trading Zone

A city trading zone shall be established by the CEO of BPA, after consultation with the media owners in the city of publication. Any change in a city trading zone shall become effective at the beginning of the Brand Report period within which the new alignment has been approved, provided such report period is the first report period of the audit period.

(b) **Retail Trading Zone**

A retail-trading zone shall be established by the CEO of BPA, after consultation with the media owners in the city of publication. Any change in a retail trading zone shall become effective at the beginning of the Brand Report period within which the new alignment has been approved, provided such report period is the first report period of the audit period.

Boundaries of retail trading zone shall be established according to census units, and population figures, and it shall be within the discretion of the CEO of BPA to determine whether areas may be included in the retail trading zone for which there are no established census unit boundaries. The circulation of all newspapers published in the same city shall use a common retail trading zone.

Any change in a retail trading zone shall become effective at the beginning of the Brand Report period within which the new alignment has been approved, provided such report period is the first report period of the audit period.

(c) **Newspaper Designated Market**

A newspaper may designate a market, subject to the approval of the CEO of BPA. A newspaper designated market is considered to be the geographical area served by the newspaper. A map of the area served must also be included on the Brand Report.

(d) **Metropolitan Statistical Areas/ Canada Post Householder**

Areas established by US Office of Management and Budget and Canada Post. A media owner opting to report by USOMB or Canada Post Householder shall label all tables accordingly.

A media owner opting to report by MSA, CMSA, or Canada Post Householder shall label all tables accordingly.

(e) **Market Segments**

A newspaper may designate a market based on non-geographic characteristics. Such groups are called "market segments." Average circulation for each market segment shall be reported in paragraph 10, including a definition of each market segment. Documentation supporting market segments may not be older than 36 months.

(f) **Other Trading Zone**

Circulation outside of the limits described in the newspaper form as city zone, retail trading zone, newspaper designated market, and market segments, shall be designated as "all Other Trading Zone."

(g) **Householder Figures**

BPA will add occupied householder figures based on data from US Office of Management and Budget or Canada Post for all counties, established city zones, retail trading zones, and/or newspaper designated markets.

(h) **Electronic**

If the average electronic circulation is equal to or greater than 5% of the average paid circulation for the period, the electronic circulation shall be detailed separately throughout the report. Individuals receiving print, electronic, and both the print and electronic versions shall be included only once.

Newspaper members reporting print and electronic versions shall report such circulation in the following columns:

Print Version Only
Electronic Version Only
Both Print and Electronic Versions

The column "Both Print and Electronic Versions" must include each subscriber only once.

(i) **Single Copy Sales**

Single Copy Sales shall be reported separately and further broken down into:

Single
Bulk
Non-Returnable
Electronic Version

Reporting Bulk Retail Sales shall have an accompanying explanatory footnote.

The quantity of Single Copy Sales sold to consumers with a promotional incentive (cover mount) shall be reported in paragraph 10 (See 1-7 226 and 1-7 424).

(j) **Maps**

Brand Reports and Audit Reports shall include a map of distribution.

1-7 415 Paragraph 6: Were Returns Accepted or Allowances Made for Undelivered, Left Over and Unsold Copies?

Shall report if sales of single copies were on a returnable or non-returnable basis including any necessary explanations.

1-7 416 Paragraph 7: Premium, Combination, Contests and Other Special Offers

Details regarding premium offers, combination sales, contests or any other special offers must be reported in this paragraph of the Brand Report.

1-7 417 Paragraph 8: Arrears Under Three Months

Shall report the number of paid subscribers in arrears as of the issue analyzed in paragraph 5.

If paragraph 5 analyses the average for the period, the arrears shall be as of any issue in February on the March Brand Report and shall be as at any issue in August for the September Brand Report.

1-7 418 Paragraph 9: Prices

Shall report the basic price(s) offered for each regularly established duration in each city trading zone, retail trading zone, designated market, MSA/Canada Post, and other trading zone. If the price charged is different for different delivery areas, one basic price per delivery area is to be established and the basic price for each delivery area reported.

All sponsored/third-party sales must be disclosed including price and quantity.

All barter sales shall be disclosed including price and quantity.

Any other offers made during the reporting period are to be reported in paragraph 9.

1-7 419 Paragraph 10: Additional Data

Shall contain any additional explanatory information necessary to supplement facts reported elsewhere in the report. Only data approved by the CEO of BPA shall be shown in this paragraph.

1-7 420

Newspapers reporting bulk paid circulation in paragraph 1 of the Brand Report shall report an analysis of that bulk circulation in paragraph 10 as follows:

"Qualified paid bulk subscriptions averaging copies were sold, in quantities of to, to qualified recipients at the following subscription prices:"

1-7 421

Newspapers reporting Single Copy Sales in paragraph 1 and include Single Copy Sales that are bulk sales and/or Non-Returnable Sales in that figure, shall report each individual sale that represents 5% or more of the average single copy sales for the period reported in paragraph 10 by Single Copy Sales, Bulk Sales and Non-Returnable Sales as an average for the period (See 1-7 231 through 1-7 233).

1-7 422

Newspapers reporting Single Copy Sales in paragraph 1 and including Non-Returnable in that figure, shall note in paragraph 10 the methodology used to determine net sales (See 1-7 231).

1-7 423

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

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

1-7 424

Newspapers reporting any Single Copy Sales sold with a promotional incentive (cover mount) shall show in paragraph 10 a monthly analysis of the number of single copies sold with a promotional incentive. The nature of the promotional incentive (cover mount) and provisions of the offer shall also be described.

1-7 425

Newspapers shall report the following definitions for each sub-category of non-paid carrier delivery and bulk circulation.

Non-Paid Individual Circulation:

Carrier Delivery - Residential: individual copies delivered by a carrier network to a single residential addressee.

Carrier Delivery - Non Residential: Individual copies delivered by a carrier network to a single business or other non-residential addressee.

Non-Paid Bulk Circulation:

Carrier Bulk – Residential: Four or more copies delivered by a carrier network to a single apartment lobby location

Carrier Bulk – Non Residential: Four or more copies delivered by a carrier network to a single retail business or other non-residential addressee.

Carrier Bulk – Boxes: Four or more copies delivered by a carrier network to a single street box/rack for redistribution to the public.

1-7 426 Media Owner's Affidavit

A Brand Report shall carry the media owner's affidavit containing two signatures. At least one of the two signatures shall be that of an officer of the publishing company or its authorized representative. The names and titles of the persons signing the Brand Report shall be typewritten below their signatures. If you file electronically, the signed affidavit must be faxed or mailed to BPA Worldwide.

This requirement shall not apply to a corrected Brand Report issued by BPA Worldwide as provided in Section 3-7 100 of these Standards.

1-7 427 Date Received

All Brand Reports will contain the date received by BPA Worldwide.

1-7 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-7 501 General

The BPA Worldwide Newspaper Audit methodology is based upon a perpetual inventory record by issue of the names on a circulation list. It is a media owner member's responsibility to insure the accurate maintenance of their circulation list and records in accordance with these Standards. The BPA Worldwide Newspaper Audit is designed to verify and authenticate the media owner's circulation claims.

1-7 502 Circulation List

A printout proof or electronic file of all names on the qualified subscriber list for the issue analyzed shall be provided for the auditor. A physical count of the circulation list shall be made by geographical distribution, and by the classifications shown in paragraph 5 of the Brand Reports.

1-7 503 Records

Media owner members shall provide for the auditor's examination proof of distribution of every issue of the newspaper for the period being audited. This proof shall be in the form of receipts from carrier delivery, post office delivery, other courier delivery, and single copy sale draw/sale/return reports.

In addition, proof of payment for distribution must be retained for the auditor's examination.

For electronic versions, summary reports of alerts and distribution/downloads shall be provided to the auditor with corresponding logs (See 1-7 210).

1-7 504

A copy of each issue, press run reports, and paper consumption reports shall be available. The auditor may request access to any ledger accounts relative to circulation and such inspection shall be made with a representative of the newspaper present.

1-7 505

Proof of classification as reported in paragraph 5 shall be available for all recipients on the qualified circulation mailing list.

1-7 506

Original orders, dues invoices, membership application forms and proof of payment for all qualified paid subscriptions shall be available to the auditor as to price, term, expiration date, how ordered and use of promotional incentive, if any.

1-7 507

Media owners shall maintain on file for use of the auditor, copies of all subscription offers, and copies of all contracts made with solicitors, subscription agencies or any other parties through whom subscriptions are obtained for their newspapers as well as for handlers (national distributors and/or wholesalers and/or retailers) of single copy sales. The auditor may request access to any ledger accounts relative to circulation, and such inspection shall be made with a representative of the newspaper present.

1-7 508

Newspapers shall code to denote on computer records and display on a resulting printout, price paid, demographic classification (if any), source and date of qualification, length for each subscription, use of promotional incentive and subscription expiration date.

1-7 509

Brand Report - The media owner shall run tabulations separating counts of the qualified paid circulation, qualified non-paid individual circulation and qualified non-paid bulk circulation respectively.

1-7 510

Newspapers reporting Single Copy Sales in paragraph 1 shall maintain records to substantiate the claim.

A shipping manifest indicating destinations for breakout shipments and bulk shipping receipts for distribution of copies from the printer to the first point(s) of redistribution, either the distributor, wholesaler/breakup agent, or outlet dealing directly with the media owner shall be maintained.

Media owners shall maintain accounts specific to each newspaper title for any national distributor, wholesale vendor with whom they conduct single copy sales transactions.

All account entries shall be documented including invoices for the draw, covers or affidavits for returns, and adequate evidence of payments received and credits issued.

1-7 511

All documents used in verifying the qualified circulation mailing list as the issue analyzed shall be available to the auditor.

1-7 512

Qualification evidence submitted by the media owner shall support all the mailing data. However, evidence supporting the street address or box number may be omitted whenever the Post Office notifies the media owner of an address change.

1-7 513

The following types of records shall NOT be acceptable as evidence of recipient qualification:

Any reports originating within the newspaper's own organization or from the media owner's staff with the exception of telephone interviews which have been approved by BPA Worldwide.

1-7 514 Worksheets Maintained by the Media Owner

BPA Worldwide can supply all the necessary worksheets to the media owner for the completion of the data reported in quarterly TRAC reports and Brand Reports.

- (a) TRAC Form (Circulation Breakout by Analyzed Issue) - Is a top line circulation reporting tool, issued quarterly. Circulation for an analyzed issue will record total circulation by qualified non-paid individual, qualified non-paid bulk, qualified paid, and non-qualified distribution. Publishers shall report how the analyzed issue compares to the average of the other issues published in the period, expressed as a percentage. The reporting of information on this form is mandatory for all newspapers.

- (b) Form CNA1-2 (Circulation by Issue) - Is a perpetual inventory of circulation which will record the qualified circulation by qualified non-paid individual, qualified non-paid bulk, paid and total qualified circulation by issue. Also recorded on this form is the non-qualified distribution. The reporting of information on this form is optional as long as publishers have comparable internal reports to track each issue published in the reporting period.
- (c) The preparation, maintenance and availability of all requirements and records necessary for an audit as stated in these Standards shall be the responsibility of the media owner. The employment of outside agents or firms for any and all circulation work does not relieve the media owner.

1-7 515

All records necessary for an audit shall be retained by the media owner until the next audit has been completed.

1-7 516

Services shall be suspended by the CEO of BPA for any newspaper whose audit takes over 75 days to complete or such further time as granted by the CEO of BPA. The media owner may appeal the CEO's decision in writing to the Executive Committee of the Board of Directors within seven days from receipt of the CEO's decision. The decision of the Executive Committee shall be final. In the event of suspension, a notice shall be posted on BPA's web site and/or released to the membership and the media owner may not publicize any circulation data until the successful completion of that audit.

1-7 517 Purchase or Transfer of Subscriptions from List of Suspended Newspapers

When a media owner purchases a newspaper and/or the subscription list of a newspaper that has ceased publishing and transfers the subscriptions to the media owner's own newspaper, the following shall apply:

The newspaper shall be homogeneous.

A record shall be available indicating the subscriber's election to receive the newspaper which has assumed the responsibility to fill the unexpired term of this suspended subscription. This election may be done through a negative option questionnaire. If such documents are returned to the media owner, they shall be considered a request to receive the surviving newspaper.

This service shall be started within six months after the last issue of this suspended newspaper, or within such further time as may be granted by the CEO of BPA.

The original order and proof of payment of the suspended newspaper shall be available.

The unexpired portion of the subscription is ascertained by either of the following methods, decided by the CEO of BPA:

By dividing the sum of money due the subscriber at the base annual price of the discontinued newspaper by the price per copy of the surviving newspaper, said per copy price to be a pro rata price of the base annual subscription price of that newspaper.

By counting the number of copies of the discontinued newspaper still due the subscriber and crediting the subscriber with this number of copies of the surviving newspaper.

A separate analysis of transferred subscriptions shall be made in paragraph 5 for one Brand Report and one Audit Report and all details concerning such subscriptions shall be reported in paragraph 10 as determined by the CEO of BPA.

The subscriptions cannot be reported as paid circulation beyond the expiration date.

1-7 518 Subscription Extensions

Number of subscriptions extended because of subscription price reductions or a reduction in the frequency of issue will be reported in paragraph 10.

1-7 519

When a media owner reduces the base annual price of a newspaper, subscriptions are extended as follows:

The unexpired portion of the subscription shall be extended in the ratio that the value of such unexpired portion at the old base rate bears to the new base rate.

All calculations shall be made effective from the date of the issue with which the price change has occurred.

1-7 520

When a media owner has reduced the base annual price and has extended the expiration date as specified above, and then, at a later date, has raised the basic annual price the new expiration dates for subscriptions originally extended shall be cut back in the ratio that the newest base price bears to the last base price. All calculations shall be made effective from the date of issue with which the price change has occurred.

1-7 521

When a media owner increases the frequency without a change in subscription rates, the media owner may extend the subscription period ordered by the subscriber. Details regarding subscription extensions shall appear in paragraph 10.

1-7 522 Requirements and Records for Computerized Audits

Media owner members using a computer for circulation fulfillment and preparation of audit data shall:

Provide electronic files of all subscribers on the qualified mailing list for the issue analyzed, including all of the coding information for each recipient.

Provide separate computer tabulations for:

Newspaper audit classifications for paragraph 5.

Post expiration copies (arrears) for paragraph 6.

Retain a "frozen" file (in any form of memory) of the issue analyzed until the annual audit has been completed. The auditor may conduct any tests to verify the accuracy of the above reports.

Allow the auditor to examine the computer procedure manuals, including the coding instructions and system flow charts.

1-7 523 Requirements for Storing Documents on Electronic Media

Media owners electing to store documents on electronic media or microfilm shall support all the data reported on the Brand Report.

Completely legible hard copy shall be provided for the stored qualification documents selected on the auditor's test.

At BPA Worldwide's discretion, periodic confirmations shall be made to verify the origin of the document.

NEWSPAPERS

1-8 Canadian Daily

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1-8 NEWSPAPER STANDARDS CANADIAN DAILY

1-8 100 ELIGIBILITY

1-8 101

A newspaper applying for membership shall qualify as stated in Section B2.0 of the Bylaws, and shall conform to the following requirements:

It shall be a daily newspaper.

The newspaper shall maintain continuity of style, format, subject or theme from issue to issue.

It shall publish for a minimum period of three months before being eligible for an initial audit, subject to the approval of the CEO of BPA.

It shall be a newspaper which includes advertising.

1-8 102 Extra Editions

When a newspaper has extra editions (See 1-8 216), the CEO of BPA shall determine whether the newspaper is a single newspaper or is, in effect, two or more separate newspapers requiring separate memberships and separate Circulation Audit Reports for each edition on the basis of the following conditions:

The extra edition is distributed to all or a specifically designated portion of the circulation list of the regular newspaper.

The extra edition is identified on its cover as a special issue of the primary newspaper.

If, after consideration of the above conditions, the CEO of BPA determines that the newspaper is, in effect, a single newspaper, the CEO of BPA shall require the newspaper to report the extra edition in paragraph 6 of the Circulation Audit Report, but not in paragraph 1 or 2 if the extra issue is distributed to less than the identical circulation list as that of the regular newspaper.

1-8 103 Separate Editions

When a newspaper has separate editions such as demographic or geographic, the CEO of BPA shall determine whether the newspaper is a single newspaper or is, in effect, two or more separate newspapers requiring separate memberships, Circulation Audit Reports for each edition. In order to qualify as a single newspaper, the separate editions shall meet all of the following conditions:

Shall have the same Audit Reports of Publishing and Circulation Policy.

Shall have the same editorial scope with only such variations in editorial matter required by the different demographic or geographic audience served.

The editions shall be identified separately on advertising rate source material.

Total Market Coverage (TMC) editions, with different editorial content than the member newspaper, may not be reported as a separate edition. TMC editions require separate memberships and reports.

If, after consideration of the above conditions, the CEO of BPA determines that the newspaper is, in effect, a single newspaper, the media owner will be given the option to report the circulations for each edition separately. If the media owner opts to report each edition separately, the media owner shall report such editions separately in paragraphs 1 and 2 of the Brand Audit Report.

When the CEO of BPA determines that the newspaper is, in effect, a single newspaper, but the media owner wishes separate Circulation Audit Reports for each edition, separate memberships will be required.

1-8 104 Supplements

When a newspaper has a supplement, the CEO of BPA shall determine whether the newspaper is a single qualified newspaper or is, in effect, two or more separate newspapers requiring separate memberships, Brand Audit Reports for each newspaper. In order to qualify as a single newspaper, the host newspaper and the supplement shall meet all of the following conditions:

The supplement shall serve the same field as the host newspaper.

The qualified recipients on the lists shall be in the same market. The supplement's recipients may be a subset of the host newspaper's qualified recipients.

The supplement shall be identified separately on advertising rate source material and in circulation promotion. In advertising rate source material, separate reference to each supplement's frequency, issuance and closing dates is required.

If, after consideration of the above conditions, the CEO of BPA determines that the newspaper is, in effect, a single newspaper, the media owner will be given the option to report the circulation at the end of the host newspaper's Brand Audit Report.

When the CEO of BPA determines that the newspaper is, in effect, a single newspaper, but the media owner wishes separate Brand Audit Reports for each supplement, separate memberships will be required.

1-8 200 DEFINITIONS AND REPORTING REQUIREMENTS

1-8 201 Advertiser and Agency Copies

Includes checking copies and prospective advertising copies and shall be reported as non-qualified distribution.

1-8 202 Arrears (Post Expire Copies Included In Qualified Paid Circulation)

Subscriptions retained on the list up to three months after expiration date and reported as paid.

Bulk subscriptions cannot be reported as paid circulation after the expiration dates.

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration.

1-8 203 Audit Report

An annual or biennial report released by the corporation.

Newspapers with average paid circulation less than 75,000 are audited biennially.

Newspapers with average paid circulation of 75,000 or greater are audited annually.

1-8 204 Back Copies

Any issue of the newspaper dated prior to the current issue shall be considered a back copy whether served to a new or renewed recipient. The "current issue" is defined as the most recent issue mailed or placed on sale, whichever comes first.

Back copies may be counted as either qualified paid or non-paid circulation only for two issues newspapers with a frequency of weekly or greater.

When the recipient has specifically requested back copies of a newspaper such copies may be counted as qualified circulation up to three issues preceding the date of the subscription order for all newspapers.

1-8 205 Base Prices

Base Price - The established prices for each subscription term as defined in the masthead of a newspaper.

Recognized base prices:

Subscriptions: one base price for each regularly established duration in each city zone, retail trading zone, designated market, Metropolitan Statistical Area (MSA)/Census Metropolitan Area (CMA), and other.

Mail subscriptions: one base price for domestic mail subscriptions and one base price for international mail subscriptions.

Single Copy Sales: one base price for each city zone, retail trading zone, designated market, MSA/ CMA, and other.

Market Segment circulation: only one base price may exist for city zone, retail trading zone, and other.

National newspapers may establish three geographic based price zones. Each price zone shall have the pricing options listed above.

1-8 206 Bulk

Two or more copies of the print version of the newspaper sent to a single addressee. This circulation shall be reported as "non-traditional" throughout the audit report.

Bulk subscriptions cannot be reported as paid circulation after the expiration date.

If the number of subscriptions involved in any one bulk sale exceeds 5% of the total average paid subscription claim for the period in which the transaction takes place, the subscriptions involved in that sale shall be fully explained in Paragraph 6, Additional Data.

Multiple copies distributed to public places for redistribution to consumers shall be reported as bulk circulation. Such distribution includes, street racks, entranceways of apartment complexes, etc. Records must be kept on an issue-by-issue basis to show distribution.

1-8 207 Carrier Delivery

Newspapers delivered by individuals; not the national postal service.

1-8 208 Combined Sales

Subscriptions to multiple newspapers (including multiple platforms of one newspaper) or newspapers and products or services sold at a special rate (See 1-8 212).

A media owner may disclose the price of each item of the combination sale or simply the value of the newspaper subscription. If this option is chosen, the disclosed value of the newspaper subscription shall be the price used. The disclosed value cannot be in excess of the total price to be paid for the entire package offered.

In the absence of individual item or newspaper price disclosures, the value of the subscription will be calculated as follows:

In order to determine the value of the subscription you shall first sum the recognized retail value (base value) of all the individual elements of the combination offer. The ratio of the bundled offer price to the sum of the individual elements determines the discount rate.

Example multiple products offer:

3 month subscription to XYZ (base rate \$20.00)
1 widget (base value \$15.00)
3 Months Risk Free access to a Web site (base value \$25.00)
Combination Rate: \$25.00

Calculation: $\$20.00 + \$15.00 + \$25.00 = \60.00

Offer: $\$25.00 / \$60.00 = 41.6\%$

Discounted Newspaper Price: $.416 \times \$20.00 = \8.33

Example multiple platform offer:

3 month subscription to XYZ print version (base rate \$20.00)
3 month subscription to XYZ digital tablet version (base rate \$15.00)
3 month subscription to XYZ restricted access website (base Rate \$10.00)
Combination rate: \$30.00

Calculation: $\$20.00 + \$15.00 + \$10.00 = \45.00

Offer: $\$30.00 / \$45.00 = 66.6\%$

Discount Price for each: Print \$13.33 ($\$20.00 \times .66$); Tablet \$9.99 ($\$15.00 \times .66$);

Website \$6.66 ($\$10.00 \times .66$)

1-8 209 Credit Subscriptions

Four percent of the total carrier delivery office pay subscriptions and the pay-in-office subscriptions may be reported as paid for by individual recipient, for the aggregate of: new credit subscriptions cancelled for non-payment and subscriptions served short term arrears. Service of credit and arrears copies beyond 90 days from date of expire cannot be included in paid circulation.

The newspaper shall maintain records to prove the service start date and stop date for each subscriber. Cancellation reports and reports showing short term arrears service shall include the subscriber's name, address, start date, cancellation date and total copies served.

1-8 210 Boxes

Boxes used to distribute newspapers. Copies distributed via boxes that meet the definition of paid circulation shall be reported as single-copy sales (See 1-8 235). All other circulation shall be reported as non-paid bulk circulation.

1-8 211 Educational

All educational copies, including but not limited to classroom, university and language programs shall be reported as "sponsored by third party or free, educational," in paragraph one.

1-8 212 Electronic Editions (E-Editions)

Electronic Editions – A newspaper (either with a companion print version or as a standalone electronic product) delivered periodically in a digital format with metered (i.e. linear) navigation, that is edited, designed, and contains date-stamped content that includes advertising (but not necessarily the same advertising as might appear in a print version). Though editing, design, and issue identification (i.e. date-stamped content) are significant differences, the primary distinction between an electronic editions and a website is the metering (this can be pagination or any other method of going through the issue from beginning to end).

An electronic edition may be dynamically created, have targeted content, or may exist in parallel with pre-existing media.

Dynamic – Editorial can be created and/or selected at point of delivery. Each recipient may receive a copy with different content and that content can change at any time.

Targeted – Editorial is changed for specifically defined groups and/or platforms before point of delivery. Each group of recipients, whether they are segmented demographically or because of the platform they use to receive the electronic product, receive a copy with different content specifically selected for that group. Apart from minor updates, the content cannot change once the issue is made available.

Replica Plus – If a print brand existed first, “plus” is editorial that is retained from the original edition and is redesigned and/or supplemented. Each issue’s content is primarily taken (but not necessarily replicated in its entirety) from the original edition (whether in print or electronic). Apart from minor updates, the content cannot change once the issue is made available.

Editorial Replica and Replica Plus - Shall be reported as “Replica” on circulation reports. All others shall be reported as “Non-Replica.” Replica and non-replica editions shall be further reported by replica, replica plus, targeted, and dynamic editions.

Media owners may also report by all of the above by platform (computer, tablet, mobile, restricted access website, etc.) (See 1-8 410).

Media owners shall report in paragraph one the gross circulation by channel (replica and non-replica) and the number of unique unduplicated subscribers.

Media owners shall disclose in Brand Reports under a “Statement of Content Platform” the form or combination of forms of electronic editions used per the above definition/description.

Circulation for electronic editions shall be audited to ensure the systems of the media owner and their vendor(s) are in compliance with BPA Worldwide standards and policies before such data may appear on a Brand Report. A special audit may be undertaken to verify the electronic edition. The printing and release of an audit shall be at the media owner’s option.

The electronic circulation shall be detailed separately throughout the report.

Non-qualified electronic edition copies shall not be reported on BPA Worldwide brand reports and audit reports.

Electronic Edition Site License: A contract or agreement between a media owner member and company/organization/ association/educational establishment to provide multiple individuals access to an electronic edition of the newspaper. Licenses may be reported for definitive amount of seats only, “global” or “companywide” license agreements may not be reported. It is the publisher’s responsibility to ensure the number of seats assigned to each educational institution does not exceed the number teachers and faculty employed and students enrolled in that institution.

Paid site licenses shall adhere to standard 1-8 235, qualified paid circulation.

Non-paid site licenses shall adhere to qualified non-paid circulation standard 1-8 234.

Paid sponsored or free electronic edition subscriptions must first be authenticated (subscriber registration) by the user. Electronic edition subscriptions may be reported as sponsored or free circulation on days the subscriber has accessed the electronic edition. Educational e-editions served through site licenses, reported under Sponsored/Free, do not require authentication by the user, and copy claims shall be based on the number of teachers, faculty and students listed in the agreements.

The media owner shall disclose in the explanatory paragraph, Additional Data the number of authorized Electronic Edition Site Licenses and Seats (individuals) served as part of the license, including paid and non-paid data. Reporting the name of the company to which the content has been licensed shall be optional. Licenses may be reported for definitive amounts only, “global” or “companywide” license agreements may not be reported.

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 may report at their option whether subscribers to the electronic edition receive an email alert only, or have downloaded/retrieved/received the electronic edition.

If email alerts are reported, such data shall be reported in paragraphs 1, 3, 4, and 5. If an alert or notification is sent to a subscriber indicating the electronic 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.

If issue downloaded/retrieved/received data is reported, such data shall be reported in paragraphs 1, 3, 4, and 5.

A downloaded/retrieved/received issue may be reported as long as the issue was downloaded/retrieved/ received within 60 days of the alert. At the time of Brand Report 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.

Digital Editions Served Through Apps:

Digital subscriptions purchased through tablets/mobile (“Digital First”): Digital circulation shall be reported from copy one and for the full term of subscription.

Paid combination sales and bundled subscriptions (print and digital): the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report digital copies.

Paid sponsored digital tablet/mobile subscriptions: the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report the digital copies.

Paid circulation with digital as a promotional incentive: the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report the digital copies.

Non-Paid circulation: recipient must authenticate (access code tied to subscriber registration/information) the digital subscription through the mobile device and access the newspaper once each reporting period.

Members may elect to report the following usage/engagement metrics:

Active Views:

- A) An active view is defined as a single copy of a publication actively opened by a device for viewing.
- B) A minimum of one page of an issue opened/served onto a device.
- C) There must be a distinct action/event by the end user to view. A single action/request which results in both the content being downloaded/made available and the automatic opening of a page of the publication is not considered a distinct action/event. A further distinct action would be required such as opening a second page.
- D) If reported, the active view shall be reported on an issue by issue basis.

Number of Sessions per issue: defined as the aggregate number of times an issue was accessed by all unique browsers (individual devices).

Time Spent in Issue per Individual Device: defined as the time spent, on average, in the issue across all unique browsers (total audience).

Number of Sessions in Issue per Individual Device: defined as the average number of times each unique browser accesses the issue being reported.

Number of Pages Accessed: defined as the total unique pages accessed for each issue by unique browsers.

1-8 213 Employee Copies

A newspaper may include in paid circulation copies served to employees, retired employees, correspondents and agents. Adequate records must be maintained by the newspaper, including: employee payrolls records of compensation paid to correspondents and agent billings.

Employee copies shall be reported as “non-traditional, sponsored by third party or free,” circulation throughout the report.

1-8 214 Expiration Date

Terminating date of subscription.

1-8 215 Extension

Advancing the expiration date of a subscription because of a reduction in the frequency of issues or a reduction in the subscription price (See 1-8 517).

1-8 216 Extra Editions

Any issue in addition to the regular editions shall be considered an extra edition. The sales of extra editions shall be included in the circulation of the day for which they are dated. Details of the extra edition shall be reported in paragraph 6 (See 1-8 102).

1-8 217 Final Settlement Date

The date by which single copy sales accounts for an issue shall be closed after which copies may no longer be counted as paid.

The "final settlement" date may be no longer than 45 days from the on-sale date of the subsequent issue for domestic sales. If returns are received following the final settlement date, they shall be reported as unsold copies.

1-8 218 Gift Subscriptions

Purchased for persons other than the purchaser's employees.

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration.

Money collected by an agent need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original subscriber.

1-8 219 Group Subscriptions

Copies purchased in lots of two or more, paid for by an employer for their employees and distributed by the media owner to addresses furnished by the employer shall be reported as Other. Records need to be made available to BPA audit staff proving the name or title of each employee receiving the newspaper.

Money collected by an agent need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original subscriber.

1-8 220 Home Delivery

Newspapers delivered to individual homes or individuals at their place of employment.

1-8 221 Hotels

Copies served qualify for inclusion in paid for by individual recipient circulation if, adequate notification is made to the guest regarding the amount to be charged for the publication and provided reasonable opportunity exists for the guest to decline delivery. If the subscriber or recipient chooses not to accept the offer, the amount to be charged for the publication must be deducted from the invoice.

All copies purchased by hotels for free distribution to their guests shall be reported as sponsored by third party or free.

1-8 222 Hybrid Subscriptions

A combination of print and digital editions with the intent to count only one copy as circulation per day. For example, a subscriber receives a print copy Monday-Friday and digital copies Saturday and Sunday. The Monday-Friday copies shall be reported as print editions, the Saturday and Sunday copies shall be reported as digital editions. Only one copy is reported per day.

1-8 223 Initial Audit Report

May be released for any consecutive three, six, or twelve month period. A newspaper shall transfer to the standard six twelve-month reporting periods ended December following the initial audit.

1-8 224 Mail Delivery

Newspapers delivered by the national postal service.

1-8 225 Membership Benefit Subscriptions

Deductible Membership Benefit Subscriptions - Individual subscriptions paid for out of membership dues where the recipient has the option of deducting the subscription price from their dues if they do not wish to receive the newspaper.

Non-deductible Membership Benefit Subscriptions - Individual subscriptions paid for out of membership dues, where the recipient does not have the option of deducting the subscription price from their dues, and automatically receives the newspaper.

An annual membership communication, e.g. dues invoice, membership packet, promotional letter (deductible and non-deductible) offers shall clearly state the amount of dues allocated for payment of the subscription.

1-8 226 Non-Deductible Subscriptions

Individual subscription paid for as part of a reservation fee for conferences, meetings, seminars, etc., where the recipient does not have the option of deducting the subscription price and automatically receives the newspaper. The offer shall clearly state the amount of money allocated for payment of the subscription.

Paragraph 7 shall include a comment describing the offer and the number of copies so reported.

1-8 227 Non-Qualified Circulation

That circulation which fails to conform to the terms of the media owner's Stated Publishing and Circulation Policy Statement" as stated on the front page of the Brand Report and the Audit Report.

1-8 228 Occasional Subscriptions

Occasional service is the delivery of issues not specifically identified as part of a new or renewed subscription. Occasional service is not permitted for consecutive days.

Occasional service must be offered to all eligible subscribing households within a market. All households scheduled to receive occasional subscription service must be notified at least fourteen days prior to the distribution date. Notification may be placed in the newspaper. If the media owner chooses to notify through the newspaper the notification must appear on a day that the subscriber receives the newspaper.

When occasional service equals or exceeds sixteen days in an annual twelve-month audit report, (eight days on a six-month audit report, and four days on a three-month audit report) "average occasional service" will be reported as a separate line item in Paragraphs 1 of the Audit Report, as "Home Delivery, Occasional Service."

When average occasional service is reported, information as to the specific dates the occasional service occurred, and the increase in paid circulation resulting for each of the dates must be disclosed in paragraph 6 service" will be reported as a separate line item in Paragraphs 1 of the Audit Report, as "Home Delivery, Occasional Service."

When average occasional service is reported, information as to the specific dates the occasional service occurred, and the increase in paid circulation resulting for each of the dates must be disclosed in paragraph 6.

1-8 229 Other

Other distribution includes:

- Bulk distribution (two or more copies to the same address)
- Employee distribution

1-8 230 Partner Distribution Agreements

A partner distribution agreement is an agreement between two newspaper media owners to distribute newspapers on days not published by one newspaper.

If a newspaper wishes to enter into a partner distribution agreement with another newspaper, the service of the partner days must be effective for all subscribers in a market.

A basic price must be established for the partner distribution frequency.

All offer and promotion materials must:

State the two newspapers involved in the partner distribution agreement;

State the term and frequency of the partner distribution service;

State the purchase price;

There may be no reference to the partner distributed newspaper being "free" or use of language that implies or infers free.

Paragraph 6 shall provide a description of the partner agreement. For each agreement, the details disclosed shall include the name of the newspapers involved, and the basic price(s) for the partner distribution service.

1-8 231 Post Expiration Copies Included in Paid Circulation Up To Three Months - See: Arrears, Section 1-8 202

1-8 232 Promotional Incentive

Any inducement offered to a subscriber for free with their own subscription.

When subscriptions are sold with a promotional incentive, the media owner must collect payment greater than the full value of the promotional incentive.

The value of the promotional incentive is considered to be the actual cost to the media owner or the recognized retail value, or the represented value, whichever is highest.

When a media owner awards incentives to contractors to purchase and promote merchandise that will best promote subscription sales, however; the actual incentive to the consumer cannot be determined by the media owner the following disclosure will be made in Paragraph 3, "X-week Y-day (Day of week to Day of week) subscriptions were sold for \$X (inclusive of GST/HST) through agents furnished with a \$Y incentive for each subscription sale. The intent of the incentive was to purchase merchandise to serve as a premium offering to be given to subscribers. The media owner is unable to determine the final incentive provided to the end consumer," whereas if the actual incentive may be determined by the media owner, it shall be disclosed.

If a back copy is included in a subscription offer, it will be considered a promotional incentive unless the subscription is put on a retroactive basis.

For Single Copy Sales, a promotional incentive (cover mount) is any inducement offered by the last agent in the chain of distribution (point-of-purchase).

Any inducement attached to, or polybagged with, a single copy at the point-of-purchase is considered a promotional incentive (cover mount).

The promotion on the cover of a newspaper of an advertiser's coupon within the newspaper is not considered a promotional incentive.

When single copies are sold with a promotional incentive, the media owner must collect payment greater than the full value of the promotional incentive. The value of the promotional incentive is considered to be the actual cost to the media owner or the recognized retail value or represented value, whichever is highest.

Free promotional incentives, the contents of which have been published either in print or electronic medium, are reported as "sold with editorial promotional incentive (including reprints)."

Editorial promotional incentives include:

- reprints of newspaper sections,
- books,
- other printed reference matter (paid annual periodicals excluded),
- pamphlets,
- disks containing items such as compilations of newspaper editorials, software demonstrations,
- clip art, fonts, etc.

For additional standards regarding services or products sold in combination with a newspaper, see standards regarding Combined Sales, Section 1-8 208.

1-8 233 Qualified Circulation

That circulation that conforms to the terms of the Statement of Publishing and Circulation Policy and is verified by auditable documentary evidence.

Individuals receiving copies of a digital version may only be considered as qualified circulation if such copies are elicited through either personal, company request, or benefit of membership.

1-8 234 Qualified Non-Paid Circulation

That circulation which meets the requirements of the above definition and which is distributed free of charge to the recipient.

1-8 235 Qualified Paid Subscription Circulation

That circulation which is not for resale, meets the above definition for qualification and the requirements listed below.

Subscription payment orders shall conform to the following conditions:

It may be paid for at any price, and shall not be free of charge.

Payment shall not be delinquent for more than three months after the beginning of the subscription service, see "credit subscriptions."

A subscription sold on a "renew until forbid" basis may be reported as paid circulation until the subscriber cancels.

Subscriptions sold with a promotional incentive must collect payment greater than the full value of the promotional incentive. The value of the promotional incentive must be subtracted from the offer to determine if the subscription is considered "paid at, or above, 50% of basic" or "paid below 50% of basic".

Subscriptions sold with an advertising contract shall be paid in addition to the regular advertising contract; and shall give the advertiser the option of deducting the subscription price from the contract if they do not wish to receive the newspaper.

Subscriptions sold via the redemption of affinity program points, e.g. frequent flyer miles, loyalty program points, etc. shall adhere to the following:

Participants shall elect to participate in the program;

The earning of miles, points, etc., shall be transaction based. For example, points earned for credit card purchase/borrowing activity and purchase of air travel, hotel stays, or car rentals, etc. qualify. Points earned without transaction activity (no financial transaction occurs) do not qualify for redemption as paid circulation;

Points shall be accruable towards future redemption's;

Points awarded upon enrollment shall be less than 50% of the lowest valued product/service offered in the program;

All affinity point programs shall offer non-newspaper products/services. Newspapers may not represent more than 75% of each program.

The value of all products and services shall be disclosed, in both monetary values and points.

The value of non-newspaper products/services shall be equal to or greater than the lowest valued newspaper.

The redeemable units of measure, e.g. miles, shall have a recognizable and accepted monetary value.

Adequate documentation of the transfer or redemption of the units of measure, e.g. frequent flyer miles, shall be made available to the audit staff.

The CEO of BPA shall have final approval of all affinity programs prior to acceptance for use in obtaining qualified paid circulation.

1-8 236 Qualified Recipients

Recipients who meet the circulation terms of recipient qualification in the Statement of Publishing and Circulation Policy statement (See 1-8 407).

1-8 237 Single Copy Sales

Those copies of a newspaper sold through newsstands and other retail outlets and reported as qualified circulation throughout a BPA Worldwide Newspaper Audit Brand Report or Audit Report. These sales shall be reported separately throughout the report.

For auditing single copy sales, final settlement figures shall be available for all the issues in the period.

Single copy sales shall conform to the following conditions:

Copies shall be paid for by the last agent in the chain of distribution (point-of-purchase) at any price and payment shall be remitted to the media owner by the final settlement date (See 1-8 217).

Single Copy Sales - Non-returnable: The media owner shall provide signed affidavits from the last agent of sale, supporting the number of copies sold to consumers.

If a media owner does not wish to collect non-returnable single copy sale affidavits they may use the following formula:

The total possible sale (draw) shall be reduced by a prorated amount calculated on the basis of whatever discounted price is actually remitted by the agent at point-of-purchase. The total amount paid to the media owner from the vendor shall be divided by the cover price to yield copies "sold".

For example, a media owner allows a 50% discount off cover price for vendors on a non-returnable system. If the vendor draws 100 copies at 50% of the \$.50 cover price, \$25.00 would be paid to the media owner. Dividing this by the \$.50 cover price yields 50 copies that may be claimed as "single copy sales".

When single copies are sold with promotional incentives the media owner must collect payment greater than the full value of the promotional incentive.

1-8 238 Single Copy Sales (Bulk)

Copies of an issue purchased in quantities of two or more, and conform to the definition of qualified paid circulation shall be reported as single copy sales in paragraph 1, identified separately in paragraph 5, and shown on an issue-by-issue basis in paragraph 6.

Money collected by an agent need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber.

1-8 239 Single Copy Sales (Non-Returnable)

Copies provided to wholesalers/retailers for resale for which returns will not be accepted, shall be reported as single copy sales in paragraph 1, identified separately in paragraph 5. Particulars of individual sales representing 5% or more of the average single copy sales for the period reported shall be shown in paragraph 6.

1-8 240 Sponsored/Third-Party Circulation

Circulation purchased by a sponsor/donor and which conforms to the definition of qualified circulation shall be reported as sponsored by third party or free, throughout the report.

Individually Addressed Subscriptions purchased in lots of 6 or more that promote the interests of the sponsor/donor and that otherwise conform to the definition of Qualified Circulation shall be reported as "Sponsored by Third Party or Free" circulation.

Individually addressed subscriptions purchased in lots of 5 or fewer that promote the interests of the sponsor/donor and that otherwise conform to the definition of qualified paid circulation shall be reported as “paid for by individual recipient” circulation. When a corporate franchisor purchases copies on behalf of franchisees, individual franchisee locations receiving 5 or fewer copies will be claimed as “paid for by individual recipient.” These copies are intended to be made available to patrons of a franchisee’s location for on premise reading, and not intended to be combined with store purchases.

Multiple copies purchased by employers for employees, identified by name or title, shall be reported as Paid for by Individual Recipient – Other regardless of the number of copies that form each transaction (See 1-8 219).

1-8 241 Statement of Content Platform

The Statement of Content Platform discloses the form or combination of forms of digital magazines/editions included in the qualified circulation. These are defined in the statement according to the appropriate definitions and descriptions that include: Dynamic, Targeted, Replica Plus, Editorial Replica, or Enhanced.

Media owners have the option to report digital magazines/editions by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

1-8 242 Subscription Conversions

Subscriptions based upon the premise that an offer has been accepted unless declined, qualify as paid circulation if money has been received to qualify the original subscription.

The subscriber must be notified of the conversion and must be given the opportunity to opt out of the conversion. The conversion is limited to the length and term offered/disclosed to the subscriber in the notification. Conversion copies may be served print editions or electronic editions.

Converted copies shall be disclosed in paragraph 6 as follows:

The number of subscribers converted to the new frequency; the effective date of the change; and the geographic market area in which the change took place.

1-8 243 Subscriptions

Contractual agreement by an individual or a firm to purchase one or more copies of a newspaper for a given period at a price.

1-8 244 Suspension of Delivery Service

A subscriber may suspend service due to vacation or other reason. The subscriber may request a refund for the suspended copies, they may extend the subscription term for the same term as the suspension of service, or they may donate the value of the suspended copies to the media owner’s newspapers in education program.

1-8 245 Sweepstakes, Prize Draws or Contests

Any subscription offer in which a prize is offered by lottery shall be considered as sold using a sweep-stakes, prize draw or contest.

1-8 246 Term of Subscription

Length of time a media owner contracts with a subscriber to send issues of the newspaper.

1-8 247 Third Party Agents

Subscriptions sold through agencies. The agency shall be a recognized business concern. It shall be the media owner’s responsibility to provide proof of qualification for such recipients.

Money collected by an agency need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber.

1-8 300 CIRCULATION AUDIT REPORTS – GENERAL INFORMATION

1-8 301

Media owner members shall report their circulation on forms supplied by the Corporation.

The filing of the media owner's circulation data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, circulation data and other data, in any form and manner authorized by the Board of Directors.

1-8 302

In the interests of uniformity in appearance and typographical setup of the BPA Worldwide Newspaper Circulation Audit Reports, BPA Worldwide will process all paragraphs which require special typesetting, ruling and extra pages. Where additional costs are incurred in setting up special paragraphs the newspaper member shall be billed those costs.

1-8 303

Time required to process a Circulation Audit Report shall be charged for at a uniform flat rate to be set from time to time by the Board of Directors.

1-8 304

Media Owner's Applicant - An applicant shall file a three, six or twelve month circulation claim as the basis for the initial audit. Upon completion of the audit and approval by a majority of the Board of Directors, the media owner will be admitted to membership and the claim shall be released as an initial Audit Report to Standard Rate and Data Service (SRDS) or Canadian Advertising Rates and Data (CARD), and/ or British Rates and Data (BRAD) or other similar services and BPA Worldwide members.

1-8 305

Newspapers shall release data quarterly through CCAB TRAC reports for the following periods: January – March, April – June, July – September, and October – December. Quarterly data shall be filed 30 days after the close of the period. TRAC reports will be released by the corporation 45 days after the close of the period. A subsequent release of quarterly TRAC data will be made available within 10 business days after the release of the original TRAC report to include members that missed the original TRAC report release. An annual TRAC report will be released 90 days after the close of the calendar year. A subsequent release of annual data will be made available within 10 business days after the release of the TRAC report to include members that missed the original TRAC report release. If TRAC filing and original release dates were to fall on a weekend or public holiday, dates shall default to the first regular business day that follows. TRAC reports shall include:

Province

Publication/Brand

Company

Market

Edition

FDSA Accreditation

Total Average Circulation

Average Net Unique Individuals

Average Paid Circulation

Average Sponsored/Free Circulation

Average Geographic Area: CMA, Non-CMA, CTZ and RTZ

Average contacts per occurrence for each additional channel (if reported)

Circulation Increases / Decreases based on the same period from the prior year

Media Owner Members - BPA Worldwide Daily Newspaper Audit Members shall concurrently release one Brand report each year for the twelve months ended December. An annual TRAC report will be released 90 days after the close of the calendar year, and will coincide with the concurrent release of brand reports. A subsequent release of annual data will be made available within 10 business days after the release of the TRAC report to include members that missed the original release of the TRAC and brand reports.

The audit will be made in the media owner's office and/or wherever the records can be properly checked.

A newspaper applicant which has chosen a period ended with a month other than December for its initial Audit Report, shall transfer to the standard December schedule with its first Circulation Audit following the initial Audit Report.

No member shall be granted an extension of time to file data except with the consent of the CEO of BPA, who shall not grant an extension greater than 5 business days, without a showing that the filing delay is a result of extenuating circumstances clearly beyond the newspaper member's control. Failure to file a claim on or before the due date or the end date of an authorized extension shall result in a suspension of services to the newspaper member and will subject the newspaper member to disciplinary action as outlined in Section B9.0 of the Bylaws.

At any time after the end date of an authorized extension, if the required circulation claim has not been filed, BPA Worldwide shall post an advisory to the BPA Worldwide website notifying the membership of the newspaper's failure to file. All costs incurred in creating and posting an advisory, if any, shall be paid for by the subject newspaper member.

Once the claim has been audited by BPA Worldwide and a proof copy created, the media owner shall advise BPA of the acceptance of the proof copy within 10 business days after the proof copy has been issued. Final approval shall be received within 20 business days of receipt of the first proof. The CEO of BPA shall not grant an extension without a showing that the delay in approving the proof copy is a result of extenuating circumstances clearly beyond the newspaper member's control.

Failure to advise BPA of the acceptance of the proof copy by this date shall result in suspension of services to the newspaper member and will subject the newspaper member to disciplinary action as outlined in Section B9.0 of the Bylaws. BPA Worldwide shall post an advisory on its website, notifying the membership of the newspaper's failure to approve the proof copy. All costs incurred in creating and posting an advisory to the website, if any, shall be paid for by the subject newspaper member.

All signatures on circulation claims submitted to the Corporation shall be over the individual's typewritten name and title.

1-8 306

The media owner has the option of submitting the special SRDS or CARD or BRAD or similar form supplied by BPA Worldwide and an additional copy of their twelve-month circulation claim. When the claim has been audited, processed, typeset and approved for printing by the media owner, the SRDS or CARD and/or BRAD or similar form will be forwarded by BPA Worldwide to Standard Rate and Data Service or Canadian Rates and Data and/or British Rates and Data or similar company for inclusion in its next issue. The additional Audit Report which has been approved by BPA Worldwide will be returned to the media owner in advance of their printed copies for their use in preparing promotional material.

1-8 307

Printed copies of Audit Reports may be purchased by a member of the Corporation at a price established by the Board of Directors.

1-8 308

All language and terminology shall be factual and auditable.

1-8 309

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards.

1-8 310

In the event of a disagreement with a decision of the CEO of BPA, a media owner member may request a hearing before an appropriate committee of the Board of Directors.

1-8 400 AUDIT REPORTS CONTENTS

1-8 401

All language and terminology shall be factual and auditable. A member may not claim or imply that BPA Worldwide audits:

readership or intent to read;

recipient's buying authority or influence.

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards. In the event of a disagreement with a decision of the CEO of BPA, a media owner member may request a hearing before an appropriate committee of the Board of Directors.

1-8 402

All newspaper members are required to report their average "paid for by the individual recipient" and "sponsored by third party or free" circulation separately throughout the Audit Report.

1-8 403

All newspaper members shall report their total circulation in paragraphs 1a, 1b, 1c, 2a, 2b, 2c, 2d, 2e, 2f, 2g of the Audit Report.

1-8 404

The first page of the report shall contain the name of the newspaper; publishing company; principal telephone number; fax number; email address; Web site URL; address of publishing company; whether or not an official membership benefit newspaper; and the year of newspaper's establishment.

1-8 405

A media owner member shall notify BPA Worldwide of any change in the name of their newspaper. At this time the media owner shall declare whether or not they wish to change the date the newspaper was established. Any change in the date of establishment should be consistent with the volume number appearing in the masthead of the newspaper. If the date of establishment and volume numbers are changed, the newspaper will be considered a new newspaper and subject to the standards requiring application for membership.

1-8 406

Whenever two or more newspapers are merged, the following comment shall appear in the upper left hand corner of one Audit Report:

Merged Newspaper -See Paragraph 6.

Paragraph 6 shall report the date of merger and other applicable information (See 1-8 516).

1-8 407 Statement of Publishing and Circulation Policy

Statement of Publishing and Circulation Policy shall contain a statement concerning the means of distribution of the newspaper and the terms of qualification. A regional newspaper shall include a description of the geographical area(s) served. Auditable documentary evidence shall be available to support the conformance to the terms of qualification. The description in this paragraph shall include all editions and the geographic areas covered by each edition.

If digital version circulation exists, the method of distribution shall be fully disclosed within the "Statement of Publishing and Circulation Policy.

1-8 408

Statement of Publishing and Circulation Policy may NOT contain any reference to:

Requests to receive the newspaper.

Recipient's reading or intent to read the newspaper.

Any claim that all people of a certain category receive the newspaper.

1-8 409

A member may not claim or imply that BPA Worldwide audits readership or intent to read. (See 1-8 401).

1-8 410 Paragraph 1: Average Circulation for Period

All copies listed in this Section are directed to subscribers or recipients as stated in the Statement of Publishing and Circulation Policy (See 1-8 407).

Daily Newspapers serving markets of 100,000 or more population shall report circulation by day, along with a weekday average, by Census Metropolitan Area (CMA) and Non Census Metropolitan Area. Daily newspapers serving markets less than 100,000 population may report circulation by day, along with a weekday average, City Trading Zone (CTZ), Retail Trading Zone (RTZ), and Other Trading Zone (OTZ). Circulation shall be reported as follows:

I. Paid for by Individual Recipient

- 1) Home Delivery
- 2) Single Copy
- 3) Hotel
- 4) Electronic Edition
- 5) Other
- Total

II. Sponsored by Third Party or Free

- 1) Home Delivery
- 2) Single Copy
- 3) Educational
- 4) Electronic Edition
- 5) Other
- Total

Copies sold at half rate or greater and copies sold at less than half rate shall be reported separately.

Non paid daily newspapers shall report gross distribution as follows:

I. Total Non-Paid Circulation

Circulation Channels

- A) Public place distribution, including street promotional copies
- B) Box distribution

Non paid daily newspapers may report by Census Metropolitan Area (CMA) and Non Census Metropolitan Area, City Trading Zone (CTZ), Retail Trading Zone (RTZ), and Other Trading Zone (OTZ), or other defined geographic region, as disclosed in the media owner's Stated Publishing and Circulation Policy.

Media owners reporting individuals receiving multiple platforms (print, digital for computers, tablets, mobile, restricted access websites, etc.) shall use the following table:

1. AVERAGE CIRCULATION FOR THE 12 MONTH PERIOD ENDING DECEMBER 2013								
Total Average Circulation	Weekday Average*	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
I. Paid for by Individual Recipient								
- Home Delivery _____								
- Single Copy _____								
- Hotel _____								
- E-edition _____								
Replica _____								
Non-Replica _____								
- Other _____								
TOTAL								
II. Sponsored by Third Party or Free								
- Home Delivery _____								
- Single Copy _____								
- E-edition _____								
Replica _____								
Non-Replica _____								
- Educational _____								
- Other _____								
TOTAL								
TOTAL CIRCULATION								
Net Unique Recipients:								

1-8 411

If, over a period of three months, the average circulation of a daily newspaper is, on a certain day of the week, 15 percent above or below the average for the other days of the week, the circulation for such day on which the overage or deficiency occurs shall be shown separately and the average for the other five days shall be shown as the "daily average".

If, over a period of three months, the average circulation of a daily newspaper is, on a certain day of the week, less than 15 percent but more than 5 percent in excess of or below the average for the other days of the week, the circulation for such day on which the excess or deficiency occurs may, at the option of the media owner, be shown separately and the average for the other five days shown as the "daily average".

The above options must receive approval from the CEO of BPA.

1-8 412

If the circulations for any days are omitted from the averages reported in the Brand Report, the circulation and the reasons for omission shall be reported separately for each day in paragraph 6.

A media owner shall omit no more than 10 days during any 12-month audit period.

1-8 413 Paragraph 2a: Average Monthly Circulation (Optional)

Daily Newspapers:

If reported, shall report the average monthly figures for the circulation by day as follows:

Individual Paid
Sponsored by third party or free
Total

1-8 414 Paragraphs 2b and 2c - Geographic Reporting

Daily Newspapers serving markets of 100,000 or more population shall report circulation by day, along with a weekday average, by Census Metropolitan Area (CMA) and Non Census Metropolitan Area (Non CMA).

Paragraph 2 (b) Average Circulation by CMA is an area established by Canada's federal government statistics bureau [Statistics Canada](#).

Paragraph 2 (c) Average circulation by Non CMA—is all circulation not within the designated CMA.

Geographic reporting for daily newspapers serving markets of less than 100,000 population is optional. If reported, circulation shall be reported by CMA and Non-CMA, or City Trading Zone (CTZ), Retail Trading Zone (RTZ) and Other Trading Zone (OTZ).

1-8 415 Census Metropolitan Area (CMA)

Areas established by US Office of Management and Budget and Canada Post

Non Census Metropolitan Area
All circulation not within the designated census metropolitan area.

1-8 416 Paragraph 3: Premium, Combination, Contests and Other Special Offers

Shall state that all premiums, combination offers, contests and other special offers meet CCAB criteria for qualified paid circulation.

Details regarding premium offers, combination sales, contests or any other special offers may be reported in this paragraph of the Circulation Audit Report.

1-8 417 Paragraph 4: Arrears under three months

Shall state that all the subscribers in arrears meet the CCAB criteria for qualified paid circulation.

1-8 418 Paragraph 6: Additional Data

Shall contain any additional explanatory information necessary to supplement facts reported elsewhere in the report. Only data approved by the CEO of BPA shall be shown in this paragraph.

1-8 419

Newspapers reporting Single Copy Sales in paragraph 1 and include Single Copy Sales that are bulk sales and/or Non-Returnable Sales in that figure, shall report each individual sale that represents 5% or more of the average single copy sales for the period reported in paragraph 10 by Single Copy Sales, Bulk Sales and Non-Returnable Sales as an average for the period (See 1-8 237 to 1-8 239).

1-8 420

Newspapers reporting Single Copy Sales in paragraph 1 and including Non-Returnable in that figure, shall note in paragraph 6 the methodology used to determine net sales (See 1-8 239).

1-8 421 Media Owner's Affidavit

A circulation claim shall include the media owner's affidavit containing two signatures. At least one of the two signatures shall be that of an officer of the publishing company or its authorized representative. The names and titles of the persons signing the brand report shall be printed below their signatures. If you file electronically, the signed affidavit must be faxed or mailed to BPA Worldwide.

1-8 422 Date Received

All circulation claims will contain the date received by BPA Worldwide.

1-8 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-8 501 General

The BPA Worldwide Newspaper Audit methodology is based upon a perpetual inventory record by issue of the names on a circulation list. It is a media owner member's responsibility to insure the accurate maintenance of their circulation list and records in accordance with these Standards. The BPA Worldwide Newspaper Audit is designed to verify and authenticate the media owner's circulation claims.

1-8 502 Circulation List

A printout proof or electronic file of all names on the qualified subscriber list for the issue analyzed shall be provided for the auditor. A physical count of the circulation list shall be made by geographical distribution.

1-8 503 Records

Media owner members shall provide for the auditor's examination proof of distribution of every issue of the newspaper for the period being audited. This proof shall be in the form of receipts from carrier delivery, post office delivery, other courier delivery, and single copy sale draw/sale/return reports.

In addition, proof of payment for distribution must be retained for the auditor's examination.

1-8 504

A copy of each issue, press run reports, and paper consumption reports shall be available. The auditor may request access to any ledger accounts relative to circulation and such inspection shall be made with a representative of the newspaper present.

1-8 505

Original orders, dues invoices, membership application forms and proof of payment for all qualified paid subscriptions shall be available to the auditor as to price, term, expiration date, and use of promotional incentive, if any.

1-8 506

Media owner shall maintain on file for use of the auditor, copies of all subscription offers, and copies of all contracts made with solicitors, subscription agencies or any other parties through whom subscriptions are obtained for their newspapers as well as for handlers (national distributors and/or wholesalers and/or retailers) of single copy sales. The auditor may request access to any ledger accounts relative to circulation, and such inspection shall be made with a representative of the newspaper present.

1-8 507

Newspapers shall code to denote on computer records and display on a resulting printout, price paid, demographic classification (if any), source and date of qualification, length for each subscription, use of promotional incentive and subscription expiration date.

1-8 508

Brand report - The media owner shall run tabulations separating counts of the “paid for by individual” and “sponsored by third party or free” distribution.

1-8 509

Newspapers reporting Single Copy Sales in paragraph 1 shall maintain records to substantiate the claim.

A shipping manifest indicating destinations for breakout shipments and bulk shipping receipts for distribution of copies from the printer to the first point(s) of redistribution, either the distributor, wholesaler/breakup agent, or outlet dealing directly with the media owner shall be maintained.

Media owners shall maintain accounts specific to each newspaper title for any national distributor, wholesale vendor with whom they conduct single copy sales transactions.

All account entries shall be documented including invoices for the draw, covers or affidavits for returns, and adequate evidence of payments received and credits issued.

1-8 510

All documents used in verifying the qualified circulation mailing list as the issue analyzed shall be available to the auditor.

1-8 511

Qualification evidence submitted by the media owner shall support all the mailing data. However, evidence supporting the street address or box number may be omitted whenever the Post Office notifies the media owner of an address change.

1-8 512

The following types of records shall NOT be acceptable as evidence of recipient qualification:

Any reports originating within the newspaper’s own organization or from the media owner’s staff with the exception of telephone interviews which have been approved by BPA Worldwide.

1-8 513 Worksheets Maintained by the Media Owner

BPA Worldwide can supply all the necessary worksheets to the media owner for the completion of the data reported in the Brand Reports.

- (a) *Form Daily1-2* (daily newspaper) (Circulation Breakout by Issue) - Is a perpetual inventory of circulation which will record the qualified circulation by paid for by individual and sponsored third party free categories by issue. The reporting of information on this form is mandatory for all newspapers.
- (b) The preparation, maintenance and availability of all requirements and records necessary for an audit as stated in these Standards shall be the responsibility of the media owner. The employment of outside agents or firms for any and all circulation work does not relieve the media owner of their responsibility.

1-8 514

All records necessary for an audit shall be retained by the media owner until the next audit has been completed.

1-8 515

Services shall be suspended by the CEO of BPA for any newspaper whose audit takes over 75 days to complete or such further time as granted by the CEO of BPA. The media owner may appeal the CEO's decision in writing to the Executive Committee of the Board of Directors within seven days from receipt of the CEO's decision. The decision of the Executive Committee shall be final. In the event of suspension, a notice shall be posted on BPA's web site and/or released to the membership and the media owner may not publicize any circulation data until the successful completion of that audit.

1-8 516 Purchase or Transfer of Subscriptions from List of Suspended Newspapers

When a media owner purchases a newspaper and/or the subscription list of a newspaper that has ceased publishing and transfers the subscriptions to the media owner's own newspaper, the following shall apply:

The newspaper shall be homogeneous.

A record shall be available indicating the subscriber's election to receive the newspaper which has assumed the responsibility to fill the unexpired term of this suspended subscription. This election may be done through a negative option questionnaire. If such documents are returned to the media owner, they shall be considered a request to receive the surviving newspaper.

This service shall be started within six months after the last issue of this suspended newspaper, or within such further time as may be granted by the CEO of BPA.

The original order and proof of payment of the suspended newspaper shall be available.

The unexpired portion of the subscription is ascertained by either of the following methods, decided by the CEO of BPA:

By dividing the sum of money due the subscriber at the base annual price of the discontinued newspaper by the price per copy of the surviving newspaper, said per copy price to be a pro rata price of the base annual subscription price of that newspaper.

By counting the number of copies of the discontinued newspaper still due the subscriber and crediting the subscriber with this number of copies of the surviving newspaper.

A separate analysis of transferred subscriptions shall be made in paragraph 2 for one Audit Report and all details concerning such subscriptions shall be reported in paragraph 6 as determined by the CEO of BPA.

The subscriptions cannot be reported as paid circulation beyond the expiration date.

1-8 517 Subscription Extensions

Number of subscriptions extended because of subscription price reductions or a reduction in the frequency of issue will be reported in paragraph 6.

1-8 518

When a media owner reduces the base annual price of a newspaper, subscriptions are extended as follows:

The unexpired portion of the subscription shall be extended in the ratio that the value of such unexpired portion at the old base rate bears to the new base rate.

All calculations shall be made effective from the date of the issue with which the price change has occurred.

1-8 519

When a media owner has reduced the base annual price and has extended the expiration date as specified above, and then, at a later date, has raised the basic annual price the new expiration dates for subscriptions originally extended shall be cut back in the ratio that the newest base price bears to the last base price. All calculations shall be made effective from the date of issue with which the price change has occurred.

1-8 520

When a media owner increases the frequency without a change in subscription rates, the media owner may extend the subscription period ordered by the subscriber. Details regarding subscription extensions shall appear in paragraph 10.

1-8 521 Requirements and Records for Computerized Audits

Media owner members using a computer for circulation fulfillment and preparation of audit data shall:

1-8 522

Provide electronic files of all subscribers on the qualified mailing list for the issue analyzed, including all of the coding information for each recipient.

1-8 523

Provide separate computer tabulations for:

Newspaper audit classifications for paragraph 1 and 2.

Post expiration copies (arrears) for paragraph 4.

1-8 524

Retain a "frozen" file (in any form of memory) of the issue analyzed until the annual audit has been completed. The auditor may conduct any tests to verify the accuracy of the above reports.

1-8 525

Allow the auditor to examine the computer procedure manuals, including the coding instructions and system flow charts.

1-8 526 Requirements for Storing Documents on Electronic Media

Media owners electing to store documents on electronic media shall support all the data reported on the Circulation Audit Report.

1-8 527

Completely legible hard copy shall be provided for the stored qualification documents selected on the auditor's test.

1-8 528

At BPA Worldwide's discretion, periodic confirmations shall be made to verify the origin of the document.

NEWSPAPERS

1-9 Global

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NEWSPAPER STANDARDS - GLOBAL

BPA Worldwide

1-9 100 ELIGIBILITY

1-9 101

A newspaper applying for membership shall qualify as stated in Section B2.0 of the Bylaws, and shall conform to the following requirements:

It may be a newspaper with paid and/or non-paid circulation.

The newspaper shall maintain continuity of style, format, subject or theme from issue to issue.

It shall publish for a minimum period of three months before being eligible for an initial audit, subject to the approval of the CEO of BPA.

It shall be a newspaper which includes advertising.

1-9 102 Extra Editions

When a newspaper has extra editions, (See 1-9 216), the CEO of BPA shall determine whether the newspaper is a single newspaper or is, in effect, two or more separate newspapers requiring separate memberships on the basis of the following conditions:

The extra edition is distributed to all or a specifically designated portion of the circulation list of the regular newspaper.

The extra edition is identified on its cover as a special issue of the primary newspaper.

If, after consideration of the above conditions, the CEO of BPA determines that the newspaper is, in effect, a single newspaper, the CEO of BPA shall require the newspaper to report the extra edition in paragraph 3 of the Brand Report and Audit Report, but not in paragraph 1 if the extra edition is distributed to less than the identical circulation list as that of the regular newspaper. An explanation shall be made in paragraph 10, subject to audit.

1-9 103 Separate Editions

When a newspaper has separate editions, (See 1-9 211), the CEO of BPA shall determine whether the newspaper is a single newspaper or is, in effect, two or more separate newspapers requiring separate memberships. In order to qualify as a single newspaper, the separate editions shall meet all of the following conditions:

Shall have the same Statement of Publishing and Circulation Policy.

Shall have the same editorial scope with only such variations in editorial matter required by the different demographic or geographic audience served.

The editions shall be identified separately on advertising rate source material.

If, after consideration of the above conditions, the CEO of BPA determines that the newspaper is, in effect, a single newspaper, the media owner will be given the option to report the circulation for each edition separately. If the media owner opts to report each edition separately, the media owner shall report such editions separately in paragraphs 1, 3, 4 and 5 of the Brand Reports and Audit Report.

When the CEO of BPA determines that the newspaper is, in effect, a single newspaper, but the media owner wishes separate Brand Reports and Audit Reports for each edition, separate memberships will be required.

1-9 200 DEFINITIONS AND REPORTING REQUIREMENTS

1-9 201 Advanced Renewals

A subscription renewed prior to expiration date of previous subscription.

1-9 202 Advertiser and Agency Copies

Includes checking copies and prospective advertising copies and shall be reported as non-qualified distribution.

1-9 203 Arrears (Post Expire Copies Included In Qualified Paid Circulation)

Subscriptions retained on the list up to three months after expiration date and reported as paid. Out of Country subscriptions may be retained on the list up to six months after expiration date and reported as paid. An average number of arrears copies for the period, expressed as a percentage, shall be reported in paragraph 8.

Bulk subscriptions cannot be reported as paid circulation after the expiration date.

1-9 204 Audit Report

An annual report released by the corporation consolidating circulation reported in the semi-annual Brand Report. The Audit Report attests to the accuracy and validity of the media owner's circulation claims in the Brand Reports.

1-9 205 Back Copies

Any issue of the newspaper dated prior to the current issue shall be considered a back copy whether served to a new or renewed recipient. The "current issue" is defined as the most recent issue distributed or placed on sale, whichever comes first.

Back copies may be counted as either qualified paid or non-paid circulation only for the two issues preceding the current issue, for newspapers with a frequency of weekly or greater.

When the recipient has specifically requested back copies of a newspaper such copies may be counted as qualified circulation up to three issues preceding the date of the subscription order for all newspapers.

1-9 206 Base Prices

Base Price - The established prices for each subscription term as defined in the masthead of a newspaper.

Recognized base prices:

Subscriptions: one base price for each regularly established duration.

Mail subscriptions: one base price for domestic mail subscriptions. International newspapers may establish a separate base price for each country/region served, including electronic editions.

Electronic Edition Subscriptions: one base price for each subscription term.

Single Copy Sales: one base price for each designated market.

Single Copy Sales Electronic Editions: one base price for each designated market.

1-9 207 Bulk

Two or more copies of the print version of the newspaper sent to a single addressee. This circulation shall be reported separately in paragraphs 1, 3, 4, and 5 of the Brand Report.

If the copies are purchased and the purchaser has a financial interest in the newspaper, those copies purchased may not be included in qualified paid circulation unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the purchaser and not for the benefit of the newspaper.

Money collected from an agent for bulk subscriptions to the same addressee need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscribers or sponsor. However, each sponsorship/third-party sale transaction must be without monetary recourse to the purchaser.

Bulk subscriptions cannot be reported as paid circulation after the expiration date.

If the number of subscriptions involved in any one bulk sale exceeds 5% of the total average paid subscription claim for the period in which the transaction takes place, the subscriptions involved in that sale shall be fully explained in Paragraph 10, Additional Data.

Multiple copies distributed to public places for redistribution shall be reported as bulk circulation. Such distribution includes, street racks, entranceways of apartment complexes, etc. Records must be kept on an issue-by-issue basis to support distribution.

1-9 208 Carrier Delivery

Newspapers delivered by employees, individuals, or contract distributors, not a national postal service.

1-9 209 Combined Sales

Subscriptions to multiple newspapers (including multiple platforms of one newspaper, i.e. print, and/or digital for computer, tablet, mobile, restricted access website, etc.) or newspapers and products/services sold together at a special rate, including charitable donations combined with non-deductible subscriptions (See 1-9 212).

Comment shall be made in paragraph 7 providing details of the number of copies of each newspaper sold in combination with another newspaper/product/service.

A media owner may disclose the price of each item of the combination sale or simply the value of the newspaper subscription. If this option is chosen, the disclosed value of the newspaper subscription shall be the price reported. The disclosed value cannot equal or exceed the total price to be paid for the entire package offered.

In the absence of individual item or newspaper price disclosures, the value of the subscription will be calculated as follows:

In order to determine the value of the subscription you shall first sum the recognized retail value (base value) of all the individual elements of the combination offer. The ratio of the bundled offer price to the sum of the individual elements determines the discount rate.

Example multiple products offer:

3 month subscription to XYZ (base rate \$20.00)

1 widget (base value \$15.00)

3 Months Risk Free access to a Web site (base value \$25.00)

Combination Rate: \$25.00

Calculation: $\$20.00 + \$15.00 + \$25.00 = \60.00

Offer: $\$25.00 / \$60.00 = 41.6\%$

Discounted Newspaper Price: $.416 \times \$20.00 = \8.33

Example multiple platform offer:

3 month subscription to XYZ print version (base rate \$20.00)

3 month subscription to XYZ digital tablet version (base rate \$15.00)

3 month subscription to XYZ restricted access website (base Rate \$10.00)

Combination rate: \$30.00

Calculation: $\$20.00 + \$15.00 + \$10.00 = \45.00

Offer: $\$30.00 / \$45.00 = 66.6\%$

Discount Price for each: Print \$13.33 ($\$20.00 \times .66$); Tablet \$9.99 ($\$15.00 \times .66$);

Website \$6.66 ($\$10.00 \times .66$)

1-9 210 Boxes

Boxes used to distribute newspapers. Copies distributed via boxes that meet the definition of paid circulation shall be reported as Single Copy Sales (See 1-9 235). All other circulation shall be reported as non-paid bulk circulation.

1-9 211 Editions

One version of a newspaper issued serially, periodically, or in multiple formats.

Extra Editions - See 1-9 216

Separate Editions – See 1-9 103

1-9 212 Electronic Editions (E-Editions)

Electronic Editions – A newspaper (either with a companion print version or as a standalone electronic product) delivered periodically in a digital format with metered (i.e. linear) navigation, that is edited, designed, and contains date-stamped content that includes advertising (but not necessarily the same advertising as might appear in a print version). Though editing, design, and issue identification (i.e. date-stamped content) are significant differences, the primary distinction between an electronic editions and a website is the metering (this can be pagination or any other method of going through the issue from beginning to end).

An electronic edition may be dynamically created, have targeted content, or may exist in parallel with pre-existing media.

Dynamic – Editorial can be created and/or selected at point of delivery. Each recipient may receive a copy with different content and that content can change at any time.

Targeted – Editorial is changed for specifically defined groups and/or platforms before point of delivery. Each group of recipients, whether they are segmented demographically or because of the platform they use to receive the electronic product, receive a copy with different content specifically selected for that group. Apart from minor updates, the content cannot change once the issue is made available.

Replica Plus – If a print brand existed first, “plus” is editorial that is retained from the original edition and is redesigned and/or supplemented. Each issue’s content is primarily taken (but not necessarily replicated in its entirety) from the original edition (whether in print or electronic). Apart from minor updates, the content cannot change once the issue is made available.

Editorial Replica and Replica Plus – Shall be reported as “Replica” on circulation reports. All others shall be reported as “Non-Replica.” Replica and non-replica editions shall be further reported by replica, replica plus, targeted, and dynamic editions.

Media owners may also report by all of the above by platform (computer, tablet, mobile, restricted access website, etc.) (See 1-9 408).

Media owners shall report in paragraph one the gross circulation by channel (replica and non-replica) and the number of unique unduplicated subscribers.

Media owners shall disclose in brand reports under a “Statement of Content Platform” the form or combination of forms of electronic editions used per the above definition/ description.

Circulation for electronic editions shall be audited to ensure the systems of the media owner and their vendor(s) are in compliance with BPA Worldwide standards and policies before such data may appear on a-Brand Report. A special audit may be undertaken to verify the electronic edition. The printing and release of an audit shall be at the media owners’ option.

The electronic circulation shall be detailed separately throughout the report.

Non-qualified electronic edition copies shall not be reported on BPA Worldwide brand reports and audit reports.

Electronic Edition Site License: A contract or agreement between a media owner member and company/organization/ association/educational establishment to provide multiple individuals access to an electronic edition of the newspaper. The contract/agreement shall require the subscriber/administrator of the site license to notify all the individual seats (individuals) of the availability of each issue. Licenses may be reported for definitive amount of seats only, “global” or “companywide” license agreements may not be reported.

Electronic edition site licenses to hotels, motels, clubs, airlines, trains, buses, cruise ships, convention centers or other similar organizations - copies may be reported as qualified circulation if the recipient downloads or accesses the issue. One circulation copy may be claimed as qualified each day the consumer accesses the edition. Publishers and their vendors have the responsibility to install and maintain systems that accurately capture individual download/access activity.

Paid site licenses shall adhere to standard 1-9 234, qualified paid circulation.

Non-paid site licenses shall adhere to qualified non-paid circulation standard 1-9 233.

The media owner shall disclose in the explanatory paragraph, Additional Data the number of authorized Electronic Edition Site Licenses and Seats (individuals) served as part of the license, including paid and non-paid data. Reporting the name of the company to which the content has been licensed shall be optional. Licenses may be reported for definitive amounts only, “global” or “companywide” license agreements may not be reported.

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 may report at their option whether subscribers to the electronic edition receive an email alert only, or have downloaded/retrieved/received the electronic edition.

If email alerts are reported, such data shall be reported in paragraphs 1, 3, 4, and 5. If an alert or notification is sent to a subscriber indicating the electronic 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.

If issue downloaded/retrieved/received data is reported, such data shall be reported in paragraphs 1, 3, 4, and 5.

A downloaded/retrieved/received issue may be reported as long as the issue was downloaded/retrieved/ received within 60 days of the alert. At the time of Brand Report 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.

Non-Paid circulation: recipient must authenticate (access code tied to subscriber registration/information) the digital subscription through their browser or mobile device. Authentication must include the subscriber’s name and a valid, deliverable email address. Registration information shall not age beyond thirty-six months.

Digital Editions Served Through Apps:

Digital subscriptions purchased through tablets/mobile (“Digital First”): Digital circulation shall be reported from copy one and for the full term of subscription.

Paid combination sales and bundled subscriptions (print and digital): the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report digital copies.

Paid sponsored digital tablet/mobile subscriptions: the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report the digital copies.

Paid circulation with digital as a promotional incentive: the digital subscription must be authenticated (access code tied to subscriber registration/information) through the device/app to report the digital copies.

Non-Paid circulation: recipient must authenticate (access code tied to subscriber registration/information) the digital subscription through the mobile device and access the newspaper once each reporting period.

(a) Members may elect to report the following usage/engagement metrics:

Active Views:

- A) An active view is defined as a single copy of a publication actively opened by a device for viewing.
- B) A minimum of one page of an issue opened/served onto a device.
- C) There must be a distinct action/event by the end user to view. A single action/request which results in both the content being downloaded/made available and the automatic opening of a page of the publication is not considered a distinct action/event. A further distinct action would be required such as opening a second page.
- D) If reported, the active view shall be reported on an issue by issue basis.

Number of Sessions per issue: defined as the aggregate number of times an issue was accessed by all unique browsers (individual devices).

Time Spent in Issue per Individual Device: defined as the time spent, on average, in the issue across all unique browsers (total audience).

Number of Sessions in Issue per Individual Device: defined as the average number of times each unique browser accesses the issue being reported.

Number of Pages Accessed: defined as the total unique pages accessed for each issue by unique browsers.

1-9 213 Employee Copies

A newspaper may include copies served to employees, retired employees, correspondents and agents in paid circulation or sponsored circulation, depending on who paid for the subscription. If the newspaper purchases the subscription for the employee the subscription shall be reported as sponsored. If the employee pays for the subscription through payroll or other deductions, the subscription shall be reported as individual paid circulation. Adequate records must be maintained by the newspaper, including: employee payrolls records of compensation paid to correspondents and agent billings.

1-9 214 Expiration Date

Terminating date of subscription.

1-9 215 Extension

Advancing the expiration date of a subscription because of a reduction in the frequency of issues or a reduction in the subscription price.

1-9 216 Extra Editions

Any issue in addition to the regular editions shall be considered an extra edition. The sales of extra editions shall be included in the circulation of the day for which they are dated. Details of the extra edition shall be reported in paragraph 10 (See 1-9 102).

1-9 217 Final Settlement Date

The date by which single copy sales accounts for an issue shall be closed after which copies may no longer be counted as paid.

Final Settlement figures shall be no longer than twelve months from the on sale date of the issue. If final sales data is not available at the time of audit, sales figures may be projected based on the previous twelve month historical average of settled issues.

1-9 218 Gift Subscriptions

Purchased for persons other than the purchaser's employees.

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration date for domestic circulation and six months after the expiration date for international circulation.

Money collected by an agent need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor.)

1-9 219 Group Subscriptions

Purchased in lots of two or more, paid for by an employer for their employees and distributed by the media owner to individual addresses furnished by the employer. These subscriptions shall be further disclosed in paragraph 9.

Copies purchased in lots of two or more, paid for by an employer for their employees and distributed by the media owner to the same addressee shall be reported as "Bulk".

Money collected by an agent need not be remitted to the media owner, provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor.)

1-9 220 Hybrid Subscriptions

A combination of print and digital editions with the intent to count only one copy as circulation per day. For example, a subscriber receives a print copy Monday-Friday and digital copies Saturday and Sunday. The Monday-Friday copies shall be reported as print editions, the Saturday and Sunday copies shall be reported as digital editions. Only one copy is reported per day.

1-9 221 Initial Audit Report

May be released for any consecutive three or six-month period. A newspaper shall transfer to the standard six-month reporting periods ended June or December with its first Brand Report following the initial audit and include whatever issues were previously audited during the period reported (See 1-9 305).

1-9 222 Mail Delivery

Newspapers delivered by the national postal service.

1-9 223 Membership Benefit Subscriptions

Deductible Membership Benefit Subscriptions - Individual subscriptions paid for out of membership dues where the recipient has the option of deducting the subscription price from their dues if they do not wish to receive the newspaper.

Non-Deductible Membership Benefit Subscriptions - Individual subscriptions paid for out of membership dues, where the recipient does not have the option of deducting the subscription price from their dues, and automatically receives the newspaper.

An annual membership communication, e.g. dues invoice, membership packet, promotional letter (deductible and non-deductible) shall clearly state the amount of dues allocated for payment of the subscription.

1-9 224 Newspapers in Education

Copies ordered for delivery to students or schools. Copies may be purchased individually, through classroom funds, or sponsored by a third party. A description of the media owner's Newspaper in Education program shall be detailed in Paragraph 10.

Electronic Newspapers in Educational copies shall be reported separately in paragraphs 1 and 5.

1-9 225 Non-Deductible Subscriptions

Individual subscription paid for as part of a reservation fee for conferences, meetings, seminars, etc., where the recipient does not have the option of deducting the subscription price and automatically receives the newspaper. The offer shall clearly state the amount of money allocated for payment of the subscription.

Paragraph 7 shall include a comment describing the non-deductible offers and the number of copies so reported.

1-9 226 Non-Qualified Circulation

That circulation which fails to conform to the terms of the media owner "Stated Publishing and Circulation Policy Statement" as stated on the front page of the Brand Report and the Audit Report.

This distribution is reported in paragraph 2.

1-9 227 Omission Days

If the circulation for any day is omitted from the averages reported in the Brand Report, the circulation and the reasons for omission shall be reported separately for each day in paragraph 10.

A media owner shall omit no more than 20 days during any 12-month audit period.

1-9 228 Partner Distribution Agreements

A partner distribution agreement is an agreement between two newspaper media owners to distribute newspapers on days not published by one newspaper. For example, Newspaper A is distributed five days a week, Monday – Friday. Newspaper B is distributed seven days a week. A partnership distribution agreement occurs when Newspaper A agrees to distribute Newspaper B to its subscribers on Saturday and Sunday.

If a newspaper wishes to enter into a partner distribution agreement with another newspaper, the service of the partner days must be effective for all subscribers in a market.

A basic price must be established for the partner distribution frequency.

All offer and promotion materials must:

- State the two newspapers involved in the partner distribution agreement;
- State the term and frequency of the partner distribution service;
- State the purchase price;

There may be no reference to the partner distributed newspaper being "free" or use of language that implies or infers free.

Paragraph 10 shall provide a description of the partner agreement. For each agreement, the details disclosed shall include the name of the newspapers involved, and the basic price(s) for the partner distribution service.

1-9 229 Post Expiration Copies Included in Paid Circulation Up To Three Months - See: Arrears, Section Arrears 1-9 203.

1-9 230 Promotional Incentive

Any inducement offered to a subscriber for free with their own subscription.

When subscriptions are sold with a promotional incentive, the media owner must collect payment greater than the full value of the promotional incentive.

The value of the promotional incentive is considered to be the actual cost to the media owner or the recognized retail value, or the represented value, whichever is highest.

If a back copy is included in a subscription offer, it will be considered a promotional incentive unless the subscription is put on a retroactive basis.

Details regarding offers with promotional incentives shall be reported in paragraph 7 of the Brand Report.

Single copies sold in Europe with a promotional incentive (cover mount), shall report copies sold as "qualified paid," regardless of the value of the promotional incentive offered.

During a temporary study period single copies and subscriptions sold in the Middle East with a promotional incentive shall report the subscription as "qualified paid," regardless of the value of the promotional incentive.

For Single Copy Sales, a promotional incentive (cover mount) is any inducement offered by the last agent in the chain of distribution (point-of-purchase).

Any inducement attached to, or polybagged with, a single copy at the point-of-purchase is considered a promotional incentive (cover mount).

Free promotional incentives, the contents of which have been published either in print or electronic medium, are reported as "sold with editorial promotional incentive (including reprints)."

Editorial promotional incentives include: reprints of newspaper sections, books, other printed reference matter (paid annual periodicals excluded), pamphlets, disks containing items such as compilations of newspaper editorials, software demonstrations, etc.

The promotion on the cover of a newspaper of an advertiser's coupon within the newspaper is not considered a promotional incentive.

When single copies are sold with a promotional incentive, the media owner must collect payment greater than the full value of the promotional incentive. The value of the promotional incentive is considered to be the actual cost to the media owner or the recognized retail value or represented value, whichever is highest.

Single copies sold in Europe and the Middle East with a promotional incentive (cover mount), shall report copies sold as "qualified paid," regardless of the value of the promotional incentive offered.

Details regarding promotional incentive offers and the number of Single Copy Sales sold with a promotional incentive shall be reported in paragraph 7 of the Brand Report.

For additional standards regarding services or products sold in combination with a newspaper, see standard regarding Combined Sales, Section 1-9 209.

1-9 231 Purchase or Transfer of Subscriptions from List of Suspended Newspapers

When a media owner purchases a newspaper and/or the subscription list of a newspaper that has ceased publishing and transfers the subscriptions to the media owner's own newspaper, the following shall apply:

The newspaper shall be homogeneous.

A record shall be available indicating the subscriber's election to receive the newspaper which has assumed the responsibility to fill the unexpired term of this suspended subscription. This election may be done through a negative option questionnaire.

This service shall be started within six months after the last issue of this suspended newspaper, or within such further time as may be granted by the CEO of BPA.

The original order and proof of payment of the suspended newspaper shall be available.

The unexpired portion of the subscription is ascertained by either of the following methods, decided by the CEO of BPA:

By dividing the sum of money due the subscriber at the base annual price of the discounted newspaper by the price per copy of the surviving newspaper, said per copy price to be a pro rata price of the base annual subscription price of that newspaper.

By counting the number of copies of the discontinued newspaper still due the subscriber and crediting the subscriber with this number of copies of the surviving newspaper.

A separate analysis of transferred subscriptions shall be made in paragraph 5 for one Brand Report and one Audit Report and all details concerning such subscriptions shall be reported in paragraph 10 as determined by the CEO of BPA.

The subscriptions cannot be reported as paid circulation beyond the expiration date.

1-9 232 Qualified Circulation

That circulation that conforms to the terms of the "Statement of Publishing and Circulation Policy" and is verified by auditable documentary evidence.

Individuals receiving copies of electronic editions may only be considered as qualified circulation if such copies are elicited through either personal, company request, or as a membership benefit.

1-9 233 Qualified Non-Paid Circulation

That circulation which meets the requirements of the above definition and which is distributed free of charge to the recipient.

1-9 234 Qualified Paid Subscription Circulation

That circulation which is not for resale, meets the above definition for qualification and the requirements listed below.

Subscription payment orders shall conform to the following conditions:

It may be paid for at any price, and shall not be free of charge.

Subscriptions sold with a portion of the proceeds going towards a charitable contribution shall exclude the charitable contribution from the subscription order amount, when reporting the subscription price.

Payment shall not be delinquent for more than six months after the beginning of the subscription service. A subscription that is ordered for which no payment had been received is considered a credit subscription. A credit subscription shall be counted as paid circulation up to six months from the date of the first issue served. If payment for such subscriptions has not been received within six months from the date of the first issue served, such copies shall be deducted from the qualified paid circulation for all copies served during this period.

A subscription sold on a “renew until forbid” basis may be reported as paid circulation until the subscriber cancels. All copies served from the moment the consumer cancels the subscription until the media owner receives notification of the cancellation, shall be reported as paid circulation as long as the media owner receives payment for the issues served (either from the consumer or agent). If the media owner is debited for unpaid copies served, then only the copies served which meets the arrears criteria may be reported in paid circulation (See standard 1-9 203).

Subscriptions sold with an advertising contract shall be paid in addition to the regular advertising contract, and shall give the advertiser the option of deducting the subscription price from the contract if they do not wish to receive the newspaper.

- (a) Subscriptions sold via the redemption of affinity program points, e.g. frequent flyer miles, loyalty program points, etc. shall adhere to the following:

Participants shall elect to participate in the program;

The earning of miles, points, etc., shall be transaction based. For example, points earned for credit card purchase/borrowing activity and purchase of air travel, hotel stays, or car rentals, etc. qualify. Points earned without transaction activity (no financial transaction occurs) do not qualify for redemption as paid circulation;

Points shall be accruable towards future redemption's.

Points awarded upon enrollment shall be less than 50% of the lowest valued product/service offered in the program.

All affinity point programs shall offer non-newspaper products/services. Newspapers may not represent more than 75% of each program.

The value of all products and services shall be disclosed, in both monetary values and points.

The value of non-newspaper products/ services shall be equal to or greater than the lowest valued newspaper.

The redeemable units of measure, e.g. miles, shall have a recognizable and accepted monetary value.

Adequate documentation of the transfer or redemption of the units of measure, e.g. frequent flyer miles, shall be made available to the audit staff.

The CEO of BPA shall have final approval of all affinity programs prior to acceptance for use in obtaining qualified paid circulation.

- (b) Copies exchanged for goods or services, or sold without using money (barter) may be claimed as qualified paid (barter) circulation providing:

The requirements relating to qualified paid circulation have been met.

The goods and services exchanged must have been sold in the public domain over the last twelve months and have a clearly identifiable and established market value.

The media owner is in possession of a written agreement with the purchaser, supported by invoiced transactions showing the quantities of copies/goods and services bartered and their value.

The media owner has provided proof that the barter transactions have been recorded in the publishing company's accounting system and subsequent financial statements.

The value of the copies sold is not subsequently redeemed by free advertising.

The goods or services provided in exchange for the publication are not related to the supply of the publication (e.g. costs for distribution or marketing of the publication).

Barter circulation shall be reported separately in paragraphs 1 and 5.

1-9 235 Single Copy Sales

Those copies of a newspaper sold through newsstands, boxes and other retail outlets and reported as qualified paid circulation throughout a BPA Worldwide Newspaper Audit Brand Report or Audit Report. These sales shall be reported separately in paragraphs 1, 3, and 5.

If final single copy sales figures are not available at the time the brand report is filed, the media owner may project single copy sales using the preceding twelve months of final sales figures and applying the sale percentage to the draw for each open issue.

Single Copy Sales shall conform to the following conditions:

Copies shall be paid for by the last agent in the chain of distribution (point-of-purchase) at any price and payment shall be remitted to the media owner by the final settlement date (See 1-9 217).

Single Copy Sales - Non-returnable: The media owner may provide signed affidavits from the last agent of sale, supporting the number of copies sold to consumers, or may apply the formula below.

If a media owner does not wish to collect non-returnable single copy sale affidavits they may use the following formula:

The total possible sale (draw) shall be reduced by a prorated amount calculated on the basis of whatever discounted price is actually remitted by the agent at point-of-purchase. The total amount paid to the media owner from the vendor shall be divided by the cover price to yield copies "sold".

For example, a media owner allows a 50% discount off cover price for vendors on a non-returnable system. If the vendor draws 100 copies at 50% of the \$.50 cover price, \$25.00 would be paid to the media owner. Dividing this by the \$.50 cover price yields 50 copies that may be claimed as "single copy sales".

Details regarding non-returnable sales shall be provided in paragraph 6.

When single copies are sold with promotional incentive, the media owner must collect payment greater than the full value of the promotional incentives.

1-9 236 Single Copy Sales (Bulk)

Copies of an issue purchased in quantities of two or more, which promote the interest of the purchaser and otherwise conform to the definition of qualified paid circulation shall be reported as Single Copy Sales in paragraph 1, identified separately in paragraph 5 and shown on an issue-by-issue basis in paragraph 10.

Money collected by an agent need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber. However, each sponsorship – third-party sale transaction must be without monetary recourse to the media owner.

1-9 237 Single Copy Sales (Non-Returnable)

Copies provided to wholesalers/retailers for resale for which returns will not be accepted, shall be reported as Single Copy Sales in paragraph 1, identified separately in paragraph 5. Particulars of individual sales representing 5% or more of the average single copy sales for the period reported shall be shown in paragraph 6.

1-9 238 Sponsored/Third-Party Circulation

Circulation which promotes the interests of the sponsor/donor and which otherwise conforms to the definition of qualified paid circulation shall be reported in Paragraphs 1, 3, 5, and 9. This includes carrier, mail, electronic, bulk and single-copy sales. Each sponsorship/third-party sale transaction must be without monetary recourse to the purchaser.

(a) Sponsored/Third-Party circulation sold with advertising shall meet the following criteria:

The advertising agreement and newspaper purchase agreement are shown on separate contracts; or

The advertising agreement includes specific language disclosing the newspaper purchase price within the contract when the agreement includes both advertising and newspapers; or

The purchase price of the newspaper is a separate itemized line within the contract or invoice when the agreement includes both advertising and the newspaper.

The purchase transaction must be separate from any other financial agreement between the third party purchaser and the newspaper.

Recipients must be advised that the copies are made available by the purchaser.

Recipients must receive initial notification that includes all information necessary to cancel delivery.

A clear audit trail must be maintained from the invoice/contract to the circulation records.

If the purchaser has a financial interest in the newspaper, those copies purchased may not be included in qualified paid circulation unless it can be proven to the satisfaction of the CEO of BPA that the sale was made for the benefit of the purchaser and not for the benefit of the newspaper.

Agents shall not be sponsors of subscriptions or single copies. Having a “doing business as” (DBA) name is not sufficient to establish an agent’s DBA operation as a sponsor.

(b) Copies exchanged for goods or services, or sold without using money (barter) may be claimed as qualified paid (barter) circulation providing:

The requirements relating to qualified paid circulation have been met.

The goods and services exchanged must have been sold in the public domain over the last twelve months and have a clearly identifiable and established market value.

The media owner is in possession of a written agreement with the purchaser, supported by invoiced transactions showing the quantities of copies/goods and services bartered and their value.

The media owner has provided proof that the barter transactions have been recorded in the publishing company’s accounting system and subsequent financial statements.

The value of the copies sold is not subsequently redeemed by free advertising.

The goods or services provided in exchange for the publication are not related to the supply of the publication (e.g. costs for distribution or marketing of the publication).

Barter circulation shall be reported separately in paragraphs 1 and 5.

1-9 239 Statement of Content Platform

The Statement of Content Platform discloses the form or combination of forms of digital magazines/editions included in the qualified circulation. These are defined in the statement according to the appropriate definitions and descriptions that include: Dynamic, Targeted, Replica Plus, Editorial Replica, or Enhanced.

Media owners have the option to report digital magazines/editions by the device/platform on which they are served (desktop/laptop computer; tablets; smartphones; other mobile devices; etc.).

1-9 240 Subscriptions

Contractual agreement by an individual or a firm to purchase one or more copies of a newspaper for a given period at a price.

1-9 241 Subscription Extensions

Number of subscriptions extended because of subscription price reductions or a reduction in the frequency of issue will be reported in paragraph 10.

When a media owner reduces the base annual price of a newspaper, subscriptions are extended as follows:

The unexpired portion of the subscription shall be extended in the ratio that the value of such unexpired portion at the old base rate bears to the new base rate.

All calculations shall be made effective from the date of the issue with which the price change has occurred.

When a media owner has reduced the base annual price and has extended the expiration date as specified above, and then, at a later date, has raised the basic annual price the new expiration dates for subscriptions originally extended shall be cut back in the ratio that the newest base price bears to the last base price. All calculations shall be made effective from the date of issue with which the price change has occurred.

When a media owner increases the frequency without a change in subscription rates the media owner may extend the subscription period ordered by the subscriber. Detail regarding subscription extensions shall appear in paragraph 10.

1-9 242 Suspension of Delivery Service

A subscriber may suspend service due to vacation or other reason. The subscriber may request a refund for the suspended copies, they may extend the subscription term for the same term as the suspension of service, or they may donate the value of the suspended copies to the media owner's newspapers in education program.

1-9 243 Sweepstakes, Prize Draws or Contests

Any subscription offer in which a prize is offered by lottery shall be considered as sold using a sweepstakes, prize draw or contest.

Details regarding these offers shall be reported in paragraph 7 of the Brand Report.

1-9 244 Term of Subscription

Length of time a media owner contracts with a subscriber to send issues of the newspaper.

1-9 245 Third Party Agents

Subscriptions sold through agencies. The agency shall be a recognized business concern. It shall be the media owner's responsibility to provide proof of qualification for such recipients.

Money collected by an agency need not be remitted to the media owner provided necessary records are in place to document the purchase and price paid by the original subscriber.

1-9 300 BRAND REPORT– GENERAL INFORMATION

1-9 301

Media owner members shall report their circulation on forms supplied by the Corporation.

The filing of the media owner's circulation data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, circulation data and other data, in any form and manner authorized by the Board of Directors.

1-9 302

In the interests of uniformity in appearance and typographical setup of the BPA Worldwide Newspaper Brand Reports and Audit Reports, BPA Worldwide will process all paragraphs which require special typesetting, ruling and extra pages. Where additional costs are incurred in setting up special paragraphs, the newspaper member shall be billed those costs.

1-9 303

Time required to process a Brand Report or Audit Report shall be charged for at a uniform flat rate to be set from time to time by the Board of Directors.

1-9 304 Media Owner Applicant

An applicant shall file a three or six month Brand Report as the basis for his initial audit for the consecutive three or six month period specified by the CEO of BPA during which qualified circulation has been practiced. Upon completion of the audit and approval by a majority of the Board of Directors, the media owner will be admitted to membership and the report shall be released as an initial Audit Report.

1-9 305 Media Owner Members

BPA Worldwide Newspaper Audit Members will release two Brand Reports each year for the six months ended June and for the six months ended December.

The six-month reports will be checked and released as Brand Reports upon receipt and completion of processing. The Brand Reports form the basis for the Audit Report. The audit will be completed after the auditor's examination of the media owner's records (See 1-9 204).

The audit will be made in the media owner's office and/or wherever the records can be properly checked.

A newspaper applicant which has chosen a period ended with a month other than June or December for its initial Audit Report, shall transfer to the standard June or December schedule with its first Brand Reports following the initial Audit Report and include whatever previously audited issues are necessary to complete the six month period.

1-9 306

Reports as outlined in the preceding sections shall be filed with the Corporation within 30 days after the period, which they cover.

No member shall be granted an extension of time to file except without the consent of the CEO of BPA, who shall not grant an extension greater than 30 days, without a showing that the filing delay is a result of extenuating circumstances clearly beyond the newspaper member's control. Failure to file a report on or before the due date or the end date of an authorized extension shall result in a suspension of services to the newspaper member and will subject the newspaper member to disciplinary action as outlined in Section B9.0 of the Bylaws.

At any time after the end date of an authorized extension, if the required Brand Report has not been filed, BPA Worldwide shall post an advisory to the BPA Worldwide website notifying the membership of the newspaper's failure to file. All costs incurred in creating and posting an advisory, if any, shall be paid for by the subject newspaper member.

No later than 60 days after the close of each reporting period, the web site, www.bpaww.com, will display the status of production for each-brand report that has not been posted to the web site. The previous period's report would be moved to "history" at this time.

When a report is received by BPA Worldwide 1 – 14 days after the stated due date and a proof copy created, the media owner shall advise BPA of the acceptance of the proof copy within 10 business days after the proof copy has been issued. Reports received 15+ days after the stated due date shall have 5 business days to accept the proof. However, for media owners filing reports prior to the stated due date and receiving a proof copy before the stated due date, the counting of business days for the acceptance process shall commence with the filing due date and not from the date the proof copy was created. For all others, final approval shall be received within 20 business days of receipt of the first proof.

The CEO of BPA shall not grant an extension without a showing that the delay in approving the proof copy is a result of extenuating circumstances clearly beyond the publication member's control.

Failure to advise BPA of the acceptance of the proof copy by this date shall result in suspension of services to the newspaper member and will subject the newspaper member to disciplinary action as outlined in Section B9.0 of the Bylaws. BPA Worldwide shall post an advisory on its website, notifying the membership of the newspaper's failure to approve the proof copy. All costs incurred in creating and posting an advisory to the website, if any, shall be paid for by the subject newspaper member.

All signatures on Brand Reports submitted to the Corporation shall be over the individual's name and title.

1-9 307

The media owner has the option of submitting the special SRDS, BRAD, or similar form supplied by BPA Worldwide and an additional copy of their six-month Brand Report. When the report has been processed, typeset and approved for printing by the media owner the SRDS, BRAD, or similar form will be forwarded by BPA Worldwide to Standard Rate and Data Service, British Rates and Data, or similar company for inclusion in its next issue. The additional Brand Report which has been approved by BPA Worldwide will be returned to the media owner in advance of their printed copies for their use in preparing promotional material.

1-9 308

Printed copies of Brand Reports and Audit Reports may be purchased by a member of the Corporation at a price established by the Board of Directors.

1-9 309

All language and terminology in the brand report and audit reports shall be factual and auditable.

1-9 310

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards.

1-9 311

In the event of a disagreement with a decision of the CEO of BPA, a media owner member may request a hearing before an appropriate committee of the Board of Directors.

1-9 400 BRAND REPORT– CONTENTS

1-9 401

All language and terminology shall be factual and auditable. A member may not claim or imply that BPA Worldwide audits:

readership or intent to read;
recipient's buying authority or influence.

No facts, figures or written statements shall appear in BPA reports other than those expressly authorized in these Standards. In the event of a disagreement with a decision of the CEO of BPA, a media owner member may request a hearing before an appropriate committee of the Board of Directors.

1-9 402

All newspaper members shall report their total qualified circulation in paragraphs 1, 3, 4, and 5, of the Brand Report. Paragraph 4 reports the average circulation of previous periods.

Newspaper members shall report their qualified paid and non-paid circulation separately in paragraphs 1, 3, 4, and 5.

1-9 403

The first page of the report shall contain the name of the newspaper; publishing company; principal telephone number; fax number; email address; Web site URL; address of publishing company; whether or not an official membership benefit newspaper; and the year of newspaper's establishment.

1-9 404

A media owner member shall notify BPA Worldwide of any change in the name of their newspaper. At this time the media owner shall declare whether or not they wish to change the date the newspaper was established. Any change in the date of establishment should be consistent with the volume number appearing in the masthead of the newspaper. If the date of establishment and volume numbers are changed, the newspaper will be considered a new newspaper and subject to the standards requiring application for membership.

1-9 405

Whenever two or more newspapers are merged, the following comment shall appear in the upper left hand corner of two consecutive Brand Reports and one Audit Report:

Merged Newspaper -See Paragraph 10.

Paragraph 10 shall report the date of merger and other applicable information.

1-9 406 Statement of Publishing and Circulation Policy

"Statement of Publishing and Circulation Policy" shall contain a statement concerning the means of distribution of the newspaper and the terms of qualification. A regional newspaper shall include a description of the geographical area(s) served. Auditable documentary evidence shall be available to support the conformance to the terms of qualification. The description in this paragraph shall include all editions and the geographic areas covered by each edition.

If electronic edition circulation exists, the method of distribution shall be fully disclosed within the "Statement of Publishing and Circulation Policy."

1-9 407

Statement of Publishing and Circulation Policy may NOT contain any reference to:

Requests to receive the newspaper.

Recipient's reading or intent to read the newspaper.

Any claim that all people of a certain category receive the newspaper.

A classification which is not reported in paragraph 5 of the report.

1-9 408 Paragraph 1: Average Circulation for Period

All copies listed in this Section are directed to subscribers or recipients as stated in the "Statement of Publishing and Circulation Policy" (See 1-9 406).

Non-Paid Newspapers shall include:

TOTAL AVERAGE CIRCULATION	
Total Non-Paid Circulation	
Circulation Channels	
A)	Individuals.....
B)	Public place distribution at retail, public, and private locations.....
C)	Boxes.....
TOTAL CIRCULATION	

Paid Newspapers shall include:

1. AVERAGE CIRCULATION FOR THE 6 MONTH PERIOD ENDING DECEMBER 2013		
	Daily (Monday - Saturday)	Sunday
TOTAL CIRCULATION		
I. Paid Circulation		
Subscriptions:		
Carrier		
Mail		
Bulk		
Total Subscriptions		
Single Copy Sales		
Newspapers in Education		
Employee Copies		
Sub-Total		
II. Paid Sponsored/Third Party Subscriptions		
Subscriptions:		
Carrier		
Mail		
Bulk		
Total Subscriptions		
Single Copy Sales		
Newspapers in Education		
Sub-Total		
Total Paid Circulation		
III. TOTAL NON-PAID CIRCULATION		
Individual		
1) Carrier delivery		
2) Mail delivery		
Bulk Distribution		
Total Non-Paid		
TOTAL QUALIFIED CIRCULATION		

The average circulation of separate issues (or groupings of issues) can be reported in columnar format at the option of the media owner.

Media owner's reporting multiple platforms (print, digital for computers, tablets, mobile, restricted access websites, etc.) may use the following tables:

1. EXECUTIVE SUMMARY					
	Print	Digital Replica	Digital Non- Replica	Gross Total	Net Uniques
Total Average Paid					
Individual _____					
Multi-Copy _____					
Single Copy Sales _____					
Subtotal					
Total Paid Sponsored/Third Party					
Individual _____					
Multi-Copy _____					
Single Copy Sales _____					
Subtotal					
Total Paid					
Total Average Non-Paid					
Individual _____					
Multi-Copy _____					
Single Copy Sales _____					
Total Non-Paid					
Total					

1a. AVERAGE FOR THE 6 MONTH PERIOD ENDED MONTH YEAR					
	Paid	Paid Sponsored/ Third Party	Total Paid	Non-Paid	Gross Total
Subscriptions:					
Individual (Print) _____					
Individual (Digital) _____					
Editorial Replica Edition _____					
Replica Plus Edition _____					
Subtotal Replica Edition					
Targeted Edition _____					
Dynamic Edition _____					
Subtotal Non-Replica Edition					
Multi-Copy (Print) _____					
Multi-Copy (Digital) _____					
Editorial Replica Edition _____					
Replica Plus Edition _____					
Subtotal Replica Edition					
Targeted Edition _____					
Dynamic Edition _____					
Subtotal Non-Replica Edition					
Subtotal					

1a. AVERAGE FOR THE 6 MONTH PERIOD ENDED MONTH YEAR					
	Paid	Paid Sponsored/ Third Party	Total Paid	Non-Paid	Gross Total
Single Copy Sales (Print)					
Single Copy Sales (Digital) _____					
Editorial Replica Edition _____					
Replica Plus Edition _____					
Subtotal Replica Edition					
Targeted Edition _____					
Dynamic Edition _____					
Subtotal Non-Replica Edition					
Subtotal					
Gross Total					

Digital editions shall be reported as replica and non-replica. Replica and non-replica editions shall be broken out further into: replica, replica plus, targeted, and dynamic editions. Media owners may also report replica, enhanced, targeted and dynamic by platform (computer, tablet, mobile, restricted access website, etc.).

1-9 409

If, over a period of three months, the average circulation of a daily newspaper is, on a certain day of the week, 15 percent above or below the average for the other days of the week, the circulation for such day on which the overage or deficiency occurs shall be shown separately and the average for the other days shall be shown as the "daily average".

If, over a period of three months, the average circulation of a daily newspaper is, on a certain day of the week, less than 15 percent but more than 5 percent in excess of or below the average for the other days of the week, the circulation for such day on which the excess or deficiency occurs may, at the option of the media owner, be shown separately and the average for the other days shown as the "daily average".

The above options must receive approval from the CEO of BPA.

Newspapers may report average paid circulation for each day of the week, at their option.

1-9 410 Paragraph 2: Average Non-Qualified Distribution Audited as Quantity Only

This distribution is reported in paragraph 2 of the Brand Report as "In addition to the qualified circulation the following average distribution is audited as to quantity only" and includes the following:

Advertisers, Agencies
Other

Non-qualified copies distributed by the media owner's salespeople to prospects are reported within paragraph 2 of the Brand Report as "Advertiser and Agency Copies".

"Other" would include copies which fail to conform to the terms of the "Statement of Publishing and Circulation Policy."

1-9 411 Paragraph 3: Average Monthly Circulation

Report the average monthly figures for the circulation as follows:

3. AVERAGE MONTHLY CIRCULATION DAILY EDITION (MONDAY - SATURDAY EDITION)							
Month	Paid			Non-Paid			Total Paid & Non-Paid Circulation
	Paid Circulation	Paid Sponsored / Third party	Total Paid	Individual Non-Paid	Bulk Non-Paid	Total Non-Paid	
January _____							
February _____							
March _____							
April _____							
May _____							
June _____							

If the average electronic edition circulation is equal to or greater than 5% of the average paid circulation for the period, the electronic edition circulation shall be detailed separately throughout the report.

When averages of issues are reported in separate columns in Paragraph 1, the same issue groupings shall each be reported in Paragraph 3.

1-9 412 Paragraph 4: Average Audited Circulation (end of previous audit)

Shall report the total audited average qualified circulation for the preceding three audit periods.

1-9 413 Paragraph 5: Geographic Analysis of Circulation

Shall contain a breakout of a specific issue for newspapers with a frequency less than daily. The breakout for Daily Newspapers may be for a specific issue, or the average of the report period.

The specific issue shall be any issue in May on the June Brand Report and any issue in November on the December Brand Report.

When averages of issues (weekday, weekend, etc.) are reported in separate columns in paragraph 1, the same issue groupings shall each be reported in paragraph 5.

Electronic edition subscribers who do not provide a land address may be reported as "email address only."

Maps

(a) Brand Reports and Audit Reports may include a map of distribution.

1-9 414 Paragraph 6: Were Returns Accepted or Allowances Made for Undelivered, Left Over and Unsold Copies?

Shall report if sales of single copies were on a returnable or non-returnable basis including any necessary explanations.

1-9 415 Paragraph 7: Promotional Incentive, Combination, Contests and Other Special Offers

Details regarding premium offers, promotional incentives, combination sales, contests or any other special offers must be reported in this paragraph of the Brand Report and Audit Report.

Newspapers reporting any Single Copy Sales sold with a promotional incentive (cover mount) shall show in paragraph 7 a monthly analysis of the number of single copies sold with a promotional incentive. The nature of the promotional incentive (cover mount) and provisions of the offer shall also be described.

1-9 416 Paragraph 8: Arrears Under Three Months

Shall report the number of paid subscribers in arrears as of the issue analyzed in paragraph 5.

If paragraph 5 analyzes the average for the period, the arrears shall be as of any issue in May on the June Brand Report and shall be as at any issue in November for the December Brand Report.

1-9 417 Paragraph 9: Prices

Shall report the basic price(s) offered for each regularly established duration.

All sponsored/third-party sales must be disclosed including price and quantity.

All barter sales shall be disclosed including price and quantity.

Any other offers made during the reporting period are to be reported in paragraph 9.

1-9 418 Paragraph 10: Additional Data

Shall contain any additional explanatory information necessary to supplement facts reported elsewhere in the report. Only data approved by the CEO of BPA shall be shown in this paragraph.

1-9 419

Newspapers reporting bulk paid circulation in paragraph 1 of the Brand Report shall report an analysis of that bulk circulation in paragraph 10 as follows:

*"Qualified paid bulk subscriptions averaging copies were sold, in quantities of
to, to qualified recipients at the following subscription prices:"*

1-9 420

Newspapers reporting Single Copy Sales in paragraph 1 and include Single Copy Sales that are bulk sales and/or Non-Returnable Sales in that figure, shall report each individual sale that represents 5% or more of the average single copy sales for the period reported in paragraph 10 by Single Copy Sales, Bulk Sales and Non-Returnable Sales as an average for the period (See 1-9 235 to 1-9 237).

1-9 421

Newspapers reporting Single Copy Sales in paragraph 1 and including Non-Returnable in that figure, shall note in paragraph 6 the methodology used to determine net sales (See Standard 1-9 235).

1-9 422 Media Owner's Affidavit

A Brand Report shall carry the media owner's affidavit containing two signatures. At least one of the two signatures shall be that of an officer of the publishing company or its authorized representative. If you file electronically, the signed affidavit must be faxed or mailed to BPA Worldwide.

This requirement shall not apply to a corrected Brand Report issued by BPA Worldwide as provided in Section N7.6 of these Standards.

1-9 423 Date Received

All Brand Reports will contain the date received by BPA Worldwide.

1-9 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-9 501 General

The BPA Worldwide Newspaper Audit methodology is based upon a perpetual inventory record by issue of the names on a circulation list. It is a media owner member's responsibility to insure the accurate maintenance of their circulation list and records in accordance with these Standards. The BPA Worldwide Newspaper Audit is designed to verify and authenticate the media owner's circulation claims.

1-9 502 Circulation List

An electronic file of all names on the qualified subscriber list for the issue analyzed shall be provided for the auditor. A physical count of the circulation list shall be made by geographical distribution, and by the classifications shown in paragraph 5 of the Brand Reports.

1-9 503 Records

A copy of each issue, press run reports, and paper consumption reports shall be available. The auditor may request access to any ledger accounts relative to circulation and such inspection shall be made with a representative of the newspaper present.

1-9 504

Media owner members shall provide for the auditor's examination proof of distribution of every issue of the newspaper for the period being audited. This proof shall be in the form of receipts from carrier delivery, post office delivery, other courier delivery, and single copy sale draw/sale/return reports.

In addition, proof of payment for distribution must be retained for the auditor's examination.

For electronic editions, summary reports of alerts and distribution/downloads shall be provided to the auditor with corresponding logs (See 1-9 212).

1-9 505

Proof of classification as reported in paragraph 5 shall be available for all recipients on the qualified circulation list. This proof may be no older than three years from the date of the issue analyzed.

1-9 506

Original orders, dues invoices, membership application forms and proof of payment for all qualified paid subscriptions shall be available to the auditor as to price, term, expiration date, how ordered and use of promotional incentive, if any.

1-9 507

Media owners shall maintain on file for use of the auditor, copies of all subscription offers, and copies of all contracts made with solicitors, subscription agencies or any other parties through whom subscriptions are obtained for their newspapers as well as for handlers (national distributors and/or wholesalers and/or retailers) of single copy sales. The auditor may request access to any ledger accounts relative to circulation, and such inspection shall be made with a representative of the newspaper present.

1-9 508

Newspapers shall code to denote on computer records and display on a resulting printout, price paid, demographic classification (if any), source and date of qualification, length for each subscription, use of promotional incentive and subscription expiration date.

1-9 509

The media owner shall run tabulations separating counts of the qualified paid circulation, sponsored, and qualified non-paid circulation respectively.

1-9 510

Newspapers reporting Single Copy Sales in paragraph 1 shall maintain records to substantiate the claim.

A shipping manifest indicating destinations for breakout shipments and bulk shipping receipts for distribution of copies from the printer to the first point(s) of redistribution, either the distributor, wholesaler/breakup agent, or outlet dealing directly with the media owner, shall be maintained.

Media owners shall maintain accounts specific to each newspaper title for any national distributor, wholesale vendor with whom they conduct single copy sales transactions.

All account entries shall be documented including invoices for the draw, covers or affidavits for returns, and adequate evidence of payments received and credits issued.

1-9 511

All documents used in verifying the qualified circulation list as the issue analyzed shall be available to the auditor.

1-9 512

Qualification evidence submitted by the media owner shall support all the circulation data. However, evidence supporting the street address or box number may be omitted whenever the national post office notifies the media owner of an address change.

1-9 513

The following types of records shall NOT be acceptable as evidence of recipient qualification:

Any reports originating within the newspaper's own organization or from the media owner's staff with the exception of telephone interviews which have been approved by BPA Worldwide.

1-9 514

BPA Worldwide can supply all the necessary worksheets to the media owner for the completion of the data reported in the Brand Reports.

Form 1-2 is a perpetual inventory of circulation which will record the qualified circulation by qualified paid, sponsored paid, qualified non-paid and total qualified circulation by issue. Also recorded on this form is the non-qualified distribution. The reporting of information on this form is mandatory for all newspapers.

1-9 515

The preparation, maintenance and availability of all requirements and records necessary for an audit as stated in these Standards shall be the responsibility of the media owner. The employment of outside agents or firms for any and all circulation work does not relieve the media owner member of their responsibility.

1-9 516

All records necessary for an audit shall be retained by the media owner until the next audit has been completed.

1-9 517

The media owner shall provide electronic files of all subscribers on the qualified distribution list for the issue(s) analyzed, including all of the coding information for each recipient.

1-9 518

The media owner shall provide separate computer tabulations for each paragraph reported.

1-9 519

The media owner shall retain a "frozen" file of the issue analyzed until the annual audit has been completed. The auditor may conduct any tests to verify the accuracy of the above reports.

1-9 520

The media owner shall allow the auditor to examine the fulfillment process manuals, including the coding instructions and system flow charts.

1-9 521

Services shall be suspended by the CEO of BPA for any newspaper whose audit takes over 75 days to complete or such further time as granted by the CEO of BPA. The media owner may appeal the CEO's decision in writing to the Executive Committee of the Board of Directors within seven days from receipt of the CEO's decision. The decision of the Executive Committee shall be final. In the event of suspension, a notice shall be posted on BPA's web site and/or released to the membership and the media owner may not publicize any circulation data until the successful completion of that audit.

1-10 SOCIAL MEDIA

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1-10 SOCIAL MEDIA STANDARDS

1-10 100 ELIGIBILITY

Media Owners who possess brand related social media online platforms, tools, or technologies used to create, generate and share content and promote an interaction between participants or communities may request BPA audit service for verification of the engagement for each application.

Social Media examples include: Facebook, Twitter, LinkedIn, YouTube, etc.

1-10 200 DEFINITIONS

1-10 201 Facebook

Facebook is a free, member-based, social networking website that allows registered users to create profiles, upload photos and video and connects people with friends and others who work, study and live around them. All interactions are published in a newsfeed, which is distributed in real-time and offers users networking opportunities.

Businesses use Facebook as a viral marketing tool to attract more visitors to their businesses website, increase their public profile, create a relationship with their current and future clients and attempt to increase revenue. Main benefits to businesses using Facebook include: brand awareness; drive web traffic; increase customer engagement; acquisition of new customers (lead generation); client/customer retention; reputation management; and customer feedback.

1-10 202 LinkedIn

LinkedIn is a business-oriented social networking site designed specifically for the business community. Individuals in professional occupations join for professional networking opportunities to make new business contacts or keep in touch with previous co-workers, affiliates, and clients.

Registered users maintain a list of contact details of people with whom they have some level of relationship, called "Connections." These are used to establish and document a network of people they know and trust professionally. Unlike other free social networking sites like Facebook or Twitter, LinkedIn requires connections to have a pre-existing relationship.

1-10 203 Social Media

Social media is web-based and mobile technology that facilitates individuals and groups of people to connect, network and interact.

Through a collection of online platforms and tools these online communities create and share information, insights, experiences, ideas, opinions, personal messages, personal profiles, online text, pictures, and other content (such as videos) links and media itself amongst people and organizations.

These social networks include sites such as Facebook, LinkedIn, Twitter, YouTube, etc., that aggregate users who are able to conduct one-to-one and one-to-many two-way conversations.

1-10 204 Twitter

Twitter is a free online social networking messaging service for individuals or businesses to send and receive short messages or updates in real time. Messages are limited to 280 characters in length, called "tweets," that are distributed to a list of followers.

Tweets may be made public and sent to anyone requesting the feed, or they can be sent only to approved followers. "Re-tweeting," is the act of forwarding tweets to other followers. Replies and Direct Messages (DMs) is a reply function that has moved Twitter into a group discussion service.

Twitter allows friends, family, complete strangers, or businesses to stay connected through quick updates and enables followers to pass on the message or information. Individuals use Twitter to as a “micro-blog” about the news, politics, TV shows, or any other hot topic. Businesses of all kinds also use Twitter to market their products and services, and to engage in dialogue with their customers.

1-10 205 YouTube

YouTube is a free video-sharing website that lets registered users to upload and share video clips online at the YouTube website. Viewing videos is open and does not require any registration. Videos that have been uploaded may also be posted on other websites.

YouTube may also serve as a platform for businesses to help them reach their targeted audience to inform, educate or entertain them. Companies use web videos to connect with current and potential customers through video marketing and advertising to demonstrate its expertise, share knowledge and market their products.

1-10 300 SOCIAL MEDIA REPORT - GENERAL

Social Media reports shall express their account activity or user engagement in reports and formats approved by the Corporation.

Media owners may release this data in standalone Audit Reports, or elect to release the data within a Brand Report.

The filing of social media data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, distribution data and other data, in any form and manner authorized by the Board of Directors.

1-10 400 SOCIAL MEDIA REPORT - CONTENT

The total at the beginning of the period and monthly totals for each channel shall be reported. The month end total for the last month in the reporting period shall be reported in the Executive Summary.

Only totals for months covered by the reporting period may be included in the report.

At the media owner’s option, social media data for multiple pages for the same platform may be combined and reported as one total. A footnote detailing the combined figures shall be included.

For all social media types included on the report, the URL (web address) and account name shall be reported.

Refer to the Brand standards, 1-1 416k, for further details regarding social media reporting requirements within the body of the Brand Report.

Data shall be reported on a monthly basis. Data will be reported as the total number of group members, likes, views, followers, etc. as of the last day of each reported month.

1-10 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-10 501 General

Historical reports or analytics captured through the site's administrative rights, screen captures or verified third party measurement reports for each form of social media reported in the period, shall be provided to the auditor.

1-10 502

Media owners shall provide for the auditor's examination proof of monthly totals for each social media platform reported in the period.

1-10 503

The auditor will compare and cross-check all records and make any other tests deemed necessary to verify the authenticity of the data.

1-10 504

Confirmation of the data may be conducted by the auditor.

1-10 505

If reported, proof of demographic classification shall be available for all recipients with claimed demographics. This proof may be no older than three years.

1-10 506

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

1-10 507

Any other records deemed necessary by the Corporation in the fulfillment of its service shall be made available.

1-11 WEBINAR

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1-11 WEBINAR STANDARDS

1-11 100 ELIGIBILITY

A Webinar applying for BPA audit service shall be defined as a web-based seminar that allows for an audience to listen and may interact with the teacher/speaker. Webinars may be archived for future retrieval.

Webinars may provide opportunities for advertising or sponsorship.

1-11 200 DEFINITIONS

1-11 201 Attendees

Unique individuals who have been verified as present (viewed live) at a webinar or downloaded an archived version.

1-11 202 Downloaded Webinar

A webinar transferred from the internet onto a desktop computer, laptop computer or mobile electronic device.

1-11 203 Length of Attendance

The total amount of time an attendee was logged on to the webinar.

1-11 204 Registration

A non-binding commitment to attend a webinar. This can be accomplished through electronic, telephonic (recorded) or hardcopy means and may be completed prior to the webinar.

The process shall require an individual to provide contact details (personal or business) such that an auditor may contact the registrant to confirm registration. This may include email address, phone number or postal address. At the option of the media owner, demographic information relevant to the event may be collected. If the webinar is a paid admission webinar, proof of payment information shall be available.

1-11 205 Registrant

A person who has completed the registration process for a webinar.

The number of registrants may be reported at the option of the media owner; however, actual attendance figures are required to be reported.

1-11 206 Unique Downloads

The unduplicated count of total number of individual downloads of the webinar.

1-11 300 WEBINAR REPORT- GENERAL

Media owners shall report their webinar attendance data in formats approved by the Corporation.

Media owners may release standalone Audit Reports, or elect to release the data within a BPA Brand Report.

The filing of the webinar data shall operate as an automatic grant to the Corporation of a perpetual and irrevocable right and license to use, publish, distribute and market, solely or in conjunction with others, distribution data and other data, in any form and manner authorized by the Board of Directors.

1-11 400 WEBINAR REPORT - CONTENT

Only webinars that occurred in the period of the report may be included in the report. Refer to the Brand standards for further details regarding webinar reporting requirements within the body of the Brand report (See 1-1 416h).

At the option of the media owner, the net total of all webinars downloaded in the period (regardless of their original release date) can be reported as additional data. Proof of these downloads shall be available and presented at the time of the audit.

1-11 401

Webinar attendees shall be counted only once in the attendance and/or registration lists.

1-11 402

Media owners may, at their option, report additional attendance data such as length of attendance provided sufficient auditable documentation proof is available to support the data.

Should a media owner wish to report any such additional data it shall first be approved by the CEO of BPA.

The claims will be checked and released as audit reports and may be incorporated within a Brand Report upon receipt and completion of processing.

1-11 403

Printed copies of Brand Reports, webinar statements and audit reports may be purchased by a media owner at a price established by the Board of Directors.

1-11 404

All language and terminology shall be factual and auditable.

1-11 405

No facts, figures or written statements shall appear in BPA reports or webinar statements other than those expressly authorized in these Standards.

1-11 500 REQUIREMENTS AND RECORDS NECESSARY FOR AN AUDIT

1-11 501

The media owner shall make available all contracts and proof of payment for all webinars in the audit period.

1-11 502

The database provided shall be de-duplicated, it shall include the list of all registrants and attendees; full registrant contact details as provided (see definition of “registrant”); date and time of attendance verification or applicable verification code; method of registration and all applicable demographic information (if reported).

1-11 503

Sample registration pages and forms shall be provided for all webinars included in the audit period.

1-11 504

If reported, proof of demographic classification shall be available for all recipients with claimed demographics. This proof may be no older than three years from the date of the webinar.

1-11 505

Proof of registration, including that from third parties, shall be available and provided for all attendees and or registrants selected for the auditor’s test.

1-11 506

Confirmation of attendance and/or registration shall be conducted by the auditor.

1-11 507

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

1-11 508

Any other records deemed necessary by the Corporation in the fulfillment of its service shall be made available.

1-12 WEBSITE

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1-12 WEBSITE STANDARDS

1-12 100 ELIGIBILITY

A media owner applying for BPA audit services shall be a collection of related web pages, images, videos or other digital assets that are hosted on a web server and contain advertising.

1-12 200 DEFINITIONS

1-12 201 Content

Text or image information supplied to users via the Internet, including data transmitted via a web application upon user request. Content may contain advertisements or other forms of advertising messages.

1-12 202 Cookie

A small piece of information (i.e., program code) that is stored on a browser for the purpose of identifying that browser during audience activity and between sessions.

1-12 203 Cookied Browser

A browser that has accepted and stored cookie information which facilitates identification.

1-12 204 Internal Users

An identified browser attributable to or belonging to an employee of the measured website/organization. Internal user data is excluded from the reported counts.

Filtration of audience activity to remove Internal User activity is required. Filtration is based on specific identification and removal of the public IP address(es) associated with the organization of the measured website.

1-12 205 Media Owner - Websites

An organization, entity or individual that supplies web content or search content and places advertising for consumption/viewing by users.

1-12 206 Pageviews

A Pageview is recorded each time a page implanted with the JavaScript code (tag) is displayed in a browser window. This will occur whether the page is served directly from the web server, from a proxy, or from the browser's cache.

1-12 207 Users

An identified and unduplicated Cookied Browser that accesses Internet content or advertising during a measurement period.

1-12 208 Sessions

A single continuous set of activity attributable to a cookied browser resulting in one or more pulled text and/or graphics downloads from a site. A period of 30 minutes of inactivity will terminate the session.

1-12 209 Average Session Duration

The time visitors remain on a site per session.

1-12 400 REPORTING REQUIREMENTS

Media owners participating in the BPA Worldwide website audit shall report website traffic on the BPA Worldwide Audited Site Traffic Data tool and Reports Library.

Media owners reporting website traffic on the BPA Worldwide Audited Site Traffic tool may report their monthly audited website traffic data within a BPA Brand Reports.

The following metrics shall be reported: Pageviews, Sessions, Users and Average Session Duration.

Additional metrics may be reported by the media owner, provided they are approved by the CEO of BPA prior to reporting.

1-12 500 AUDIT PROCEDURE

1-12 501

The auditor shall verify all media owner web pages have the JavaScript code (tag), the code is properly placed on each web page, and the code is properly executing.

Media owners may elect to use Google Analytics, Adobe (Omniure) SiteCatalyst, or other analytics tools (subject to BPA review for appropriate audit trails) to report website traffic.

1-12 502

At its discretion, the corporation shall conduct a tag code audit to identify any pages missing respective tag code and/or pages with duplicate tags. The interval of this audit may be increased if resulting findings warrant more frequent testing.

SECTION II SPECIAL MARKETING AUDITS

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2-1 CENSUS AUDIT

2-1 100 Eligibility

A media member in good standing may apply for a census report in addition to the regular circulation audit and shall proceed as follows:

Complete a census audit form and file it with the Corporation. The census audit form shall be in conformance with these Standards and shall be the basis for the census audit report.

2-1 101

Upon receipt of the census audit form the Corporation shall make an examination of the publication's records and complete the census audit. The census audit will be released on a separate report.

2-1 102

If it is found that the publication's records are incomplete and the census audit cannot be made, the media owner shall install and maintain such auditable records as recommended by the Corporation if they plan to reapply for a census audit at a future date. A census audit report will not be released until a publication's records are audited in accordance with the instructions of the Corporation.

2-1 200 Definition of a Unit

A unit shall be defined as an establishment, primarily engaged in one type of economic activity at a single physical location.

2-1 300 Census Audit Report

A report released by the Corporation attesting to the accuracy and validity of the number of census, plants or establishments in the field covered by the census.

2-1 301

Media owner members shall report their census breakout on forms supplied by the Corporation. In the interests of uniformity in appearance and typographical set-up of the census audit report, BPA Worldwide will process all paragraphs requiring special typesetting, ruling, and extra pages. The publication member shall be billed the production, services, and distribution costs.

2-1 303 Printed Copies of Census Audit Report

Distribution of the census audit report shall be made only after an official release is made by the media owner.

Thereafter, printed copies may be purchased by any member from the Corporation at a price fixed by the Board of Directors. A member shall not reproduce entire census audit reports and any publicity shall be in conformance with these Standards.

2-1 400 Audit Report Contents

The census audit report shall contain the name of the publication; publishing company; address of publishing company; telephone and fax numbers; email address, Web site URL, whether or not an official association publication; year of the publication's establishment; number of issues per year; field served; definition of recipient qualification; report expiration date; and the purpose of the report. The same field served and definition of recipient qualification as used in the regular circulation audit for this period shall be reported in the census audit report.

The census audit report shall contain the name of the census; publishing company; address of publishing company; telephone and fax numbers; e-mail address and Web site URL; field served; and the definition of a unit.

2-1 401 Industry and Size Breakout of Census Data

Shall contain a breakout of the total number of units by one or more of the following types of classifications, either as separate totals or in a cross-tabulation breakout:

- Type of Business
- Size or Volume or Number of Employees
- Job Titles
- Job Functions

Classifications which are reported as subtotals will be arranged in such a way that no confusion can occur about the exact number of units being reported.

2-1 402 Source Breakout of Census Data

Shall contain an analysis of the number of units in the census by source. Media owners have the option to report age of source of the non-paid circulation using one, two, and three year columns, or any combination thereof, and shall be in conformance with the Standards for reporting these data.

2-1 403 Geographical Breakout of Census Data

Shall contain a breakout of the total number of units by county, state, province, nation, or other accepted geographical area.

2-1 404

A physical count of the mailing list for the issue analyzed shall be made by the media owner of the number of industry units in each geographical area.

2-1 500 Audit Requirements

Qualification evidence shall be available to the auditor to support any additional data reported in the census audit as well as the qualification material required for the regular annual circulation audit. This proof may be no older than three years.

2-1 501

The preparation, maintenance and availability of all requirements and records which are necessary for a census audit as stated in these Standards shall be the responsibility of the media owner. The employment of outside agents for firms for any or all census audit work does not relieve the media owner member of their responsibility.

All records necessary for an audit shall be retained by the member owner until the next census audit has been completed or for a period of not less than three years.

2-2 FIRM/CORPORATE RANKING AUDIT

2-2 100 Eligibility

A publication member in good standing may apply for a Firm/Corporate Ranking Audit Report in addition to the regular circulation audit and shall proceed as follows:

Complete a Firm/Corporate Ranking audit form and file it with the Corporation. The Firm/Corporate Ranking audit form shall be in conformance with these Standards and shall be the basis for the Firm/Corporate Ranking audit report.

2-2 101

Upon receipt of the Firm/Corporate Ranking audit form, the Corporation shall make an examination of the publication's records and complete the Firm/Corporate Ranking audit. The Firm/Corporate Ranking audit will be released on a separate report (See 2-2 300).

A publication member who has successfully completed a Firm/Corporate Ranking audit shall have the option of reporting Firm/Corporate Ranking data in their brand report as follows:

- a. The initial reporting of Firm/Corporate Ranking data for the demographic breakout of qualified circulation shall be in a Firm/Corporate Ranking Audit Report or combined with the regular circulation audit report. Thereafter, the media owner may elect to report new Firm/Corporate Ranking data in their interim brand report and/or second-brand report.
- b. A media owner may elect to report new Firm/Corporate Ranking data on a Firm/Corporate Ranking brand report at the time they file their regular interim brand report and/or second brand report.
- c. New Firm/Corporate Ranking data reported on the interim brand report or second brand report shall be within one year from the date of the latest Firm/Corporate Ranking Audit Report.
- d. New Firm/Corporate Ranking data may be reported on a brand report provided these data are subject to audit at the time of the next regular annual circulation audit. The media owner shall file the Firm/Corporate Ranking audit contract and fee at the same time they file their brand report with the Corporation.
- e. A media owner who elects to report new supplementary data on their interim and/or second six-month brand report shall report their demographic break-out of qualified circulation as a separate analysis in addition to the secondary or multiple analyses of the supplementary data reported.

2-2 102

If it is found that the publication's records are incomplete and the Firm/Corporate Ranking audit cannot be made, the media owner shall install and maintain such auditable records as recommended by the Corporation if they plan to reapply for a Firm/Corporate Ranking audit at a future date. A Firm/Corporate Ranking audit report will not be released until a publication's records are audited in accordance with the instructions of the Corporation.

2-2 200 Definition of a Firm

A firm shall be defined within the Firm/Corporate Ranking audit by the member parent company. All affiliates, subsidiaries, branches and divisions will carry the rankings of the member parent company.

2-2 300 Firm/Corporate Ranking Audit Report

A report released by the Corporation attesting to the accuracy and validity of the number of firms or establishments according to Firm/Corporate Ranking data.

2-2 301

Members shall report their Firm/Corporate Ranking breakout on forms supplied by the Corporation. In the interests of uniformity in appearance and typographical set-up of the Firm/Corporate Ranking Audit Report, BPA Worldwide will process all paragraphs requiring special typesetting, ruling, and extra pages. The publication member shall be billed the production, services, and distribution costs.

2-2 302 Printed Copies of Firm/Corporate Ranking Audit Report

Distribution of the Firm/Corporate Ranking Audit Report shall be made only after an official release is made by the media owner.

Thereafter, printed copies may be purchased by any member from the Corporation at a price fixed by the Board of Directors. A member shall not reproduce entire Firm/Corporate Ranking Audit Reports and any publicity shall be in conformance with these Standards.

2-2 400 Report Contents

The Firm/Corporate Ranking Audit Report shall contain the name of the publication; publishing company; address of publishing company; telephone and fax numbers; email address, Web site URL, whether or not an official association publication; year of the publication's establishment; number of issues per year; field served; definition of recipient qualification; report expiration date; and the purpose of the report. The same field served and definition of recipient qualification as used in the regular circulation audit for this period shall be reported in the Firm/Corporate Ranking audit report. The source of firm/corporate ranking must be disclosed in the purpose, including the published date of the firm/corporate ranking data.

2-2 401 Industry and Size Breakout of Firm/Corporate Ranking Data

Shall contain a breakout of Firm/Corporate Ranking by one or more of the following types of classifications, either as separate totals or in a cross-tabulation breakout:

Type of Business

Size or Volume or Number of Employees

Job Titles

Job Functions

Classifications reported as subtotals will be arranged in such a way that no confusion can occur about the exact number of firms being reported.

2-2 402

Qualified recipients at the same unit shall have all their location specific data uniformly classified, based on a methodology approved by the CEO of BPA.

2-2 403

Qualification evidence shall be available to the auditor to support any additional data reported in the Firm/Corporate Ranking audit, as well as the qualification material required for the regular annual circulation audit. This proof may be no older than three years.

2-2 404

A cross-reference filing system may be required for each recipient assigned to a firm/corporate ranking. The media owner must demonstrate linkages of Parent Companies to affiliates, subsidiaries, branches or divisions.

2-2 500 Audit Requirements

The preparation, maintenance and availability of all requirements and records necessary for a Firm/Corporate Ranking audit, as stated in these Standards, shall be the responsibility of the media owner. The employment of outside agents for firms for any or all Firm/Corporate Ranking audit work does not relieve the member of their responsibility.

All records necessary for an audit shall be retained by the media owner until the next Firm/Corporate Ranking audit has been completed or for a period of not less than three years.

2-3 PROJECTED RESEARCH STUDY OF PASS-ALONG RECEIVERSHIP

2-3 100 Eligibility

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

- a) 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.
- b) The pass-along data will be collected via a telephone, e-mail and/or mail survey using an approved questionnaire form.
- c) 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. Media owners may gather pass-along recipients' full names at the media owner'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.
- d) The study must abide by the standards established by the Advertising Research Foundation's (ARF) Guidelines for Audience Research on Business Publications, with the exception of BPA's required response rate (see below).
- e) 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 Standards.
- f) At the conclusion of the study, complete a "Full Disclosure Form for Research" established by the Association of National Advertisers, Inc. (ANA) and submit a copy to BPA Worldwide.
- g) 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.
- h) BPA Worldwide shall release a Research Study of Pass-Along Receivership Report only if a publication attains a minimum response of 45% of the sample size which also shall be an acceptable and a representable minimum of the population being tested.

2-3 102

Upon receipt of the contract, BPA Worldwide will review the objective of the research study and the intended methodology. Utilizing the expertise of an independent panel of research professionals, 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, as established by the ARF Guidelines for Audience Research on Business Publications. 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.

2-3 103

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, analyzing and projecting of all usable responses. BPA Worldwide's independent panel of research professionals shall review the conclusions and interpretations of the study for conformance to generally accepted research practices and ethics, as established by the ARF Guidelines for Audience Research on Business Publications. 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 media owner's choice of research methodology.

2-3 104

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.

2-3 200 Definition - Pass-Along Receivership

A research study conducted to a sample of a circulation file to determine the number of individuals who pass-along their copy of a publication to other individuals in their workplace.

Job titles of the individuals who received passed copies is also collected. Upon successful completion, with sufficient responses, the results are projected against the full file to calculate a pass-along figure.

2-3 300 Pass-Along Report

At the completion of the audit, BPA Worldwide may release a Projected Research Study of Pass-Along Receivership Report. The report will be separate from all other reports of the member publication.

2-3 301

A report released by the Corporation attesting to the verification of: the sample selection, the survey implementation, the tabulation of returns, the coding of the responses, the tabulation of the responses and the projection of the data.

2-3 302

The report shall state that the methodology and subsequent results were reviewed by BPA Worldwide's independent panel of research professionals for conformance to ARF's Guidelines for Audience Research on Business Publications.

2-3 303

Members shall report on forms supplied by the Corporation.

2-3 304

In the interests of uniformity in appearance and typographical setup, BPA Worldwide shall approve all paragraphs or tables requiring special typesetting, ruling and extra pages. BPA Worldwide shall print the reports and bill the media owner for the service in accordance with fees periodically set by the Board of Directors.

BPA Worldwide shall print the reports and bill the publication for the service in accordance with fees periodically set by the Board of Directors.

2-3 305

Printing and distribution of the report shall be made only after an official, signed release is made by the media owner. Thereafter, printed copies may be purchased by any member from the Corporation at a price fixed by the Board of Directors. Publicity shall be in conformance with the BPA Worldwide Publicity Standards.

2-3 400 Report Contents

The report will include the following elements:

- a. The name of the publication member, its company and address.
- b. The name of the firm conducting the study and its address.
- c. The date the study was completed.
- d. The date the report expires.
- e. A description of the study, e.g., a name or title.
- f. The date of the issue of the publication from which the sample was drawn.
- g. A statement regarding the "Purpose" of the project.
- h. An announcement signifying the inclusion of projected data, if applicable.
- i. A statement attesting to BPA Worldwide's verification and involvement in conducting the study.
- j. A statement concerning existence of any interpretations and conclusions, and who has made them.
- k. A full disclosure of the methodology utilized in the study.
- l. A summary of all respondents differentiated by usable returns and unusable (incomplete, blank, postal returns, etc.) returns, and number of efforts.
- m. Any analyses pertinent to the study, including levels of confidence (+/-), the tabulations for which can be supported by the research documentation.
- n. A variance table detailing the variance between the sample, the respondents to the sample, and to the total qualified.
- o. A statement by BPA Worldwide disclaiming liability for the soundness or correctness of data resulting from the media owner's or independent firm's choice of research methodology or any interpretations or conclusions contained in the report.

2-3 401

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.

2-3 500 Audit Requirements

A complete list of the population studied in zip code then alphabetic by last name sequence shall be retained and made available to the Corporation.

2-3 501

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

2-3 502

Computer instructions, console logs, operator journals, run sheets and whatever other documentation is customarily available to perform or which results from the performance of the sample selection shall be retained and made available to the Corporation.

2-3 503

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

2-3 504

Copies of completed telephone interview forms and/or all mail survey returns, with envelopes, and an affidavit (from the publication, research firm, telemarketing firm) attesting to the completeness of the returns.

2-3 505

Printout or listing of all usable responses including all code input.

2-3 506

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

2-3 507

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

2-3 508

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

2-4 SUBSCRIBER STUDY AUDIT

2-4 100 Eligibility

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

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

- f. A minimum of 350 useable responses in tabulation is required.

2-4 102

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 and costs associated with its evaluation.

2-4 103

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 media owner's choice of research methodology.

2-4 104

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.

2-4 300 Audit Opinion Letter

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.

2-4 301

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.

2-4 302 Audit Opinion Letter Contents

The Audit Opinion Letter will include the following elements:

- a. The name of the publication member, its company and address
- b. The name of the independent market research company and address
- c. The date the study was completed.
- d. Number of questionnaires distributed
- e. Means of distribution (date of individual efforts)
- f. Total useable respondents
- g. Response Rate
- h. Incentive
- i. The date/month/period of the issue of the publication from which the sample was drawn.

2-4 303

Media owners will have the option of disclosing subscriber study questionnaire/survey.

2-4 400 Analyzed Issue

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.

2-4 500 Audit Requirements

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.

2-4 501

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.

2-4 502

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.

2-4 503

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

2-4 504

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.

2-4 505

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

2-4 506

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

2-5 SUPPLEMENTARY AUDIT

Supplementary Business/Demographic Audit

Audited data released by the Corporation attesting to the accuracy and validity of the number of secondary or multiple products or type of products approved, purchased, recommended or specified, or functions or titles of the qualified recipients of a publication, or any other demographic information gathered through multiple response questions.

Any questions which contain purchasing authorization but is a qualifying question for the entire qualified list e.g. primary, not secondary information and does not contain an analysis of multiple response data, shall not be considered a supplementary question. If an analysis of multiple response data is included in the report, it shall be considered supplementary.

Media owners wishing to compare circulation data to benchmark data may do so in a supplementary audit report. The benchmark data, e.g. U.S. Census, published rankings of corporations, etc., may be more than three years old but shall be the most recently released data at the time of the audit, but not necessarily for the same time period as the audit.

2-5 100 Eligibility and Procedures

A publication member in good standing may apply for a supplementary demographic audit in addition to the regular circulation audit and shall proceed as follows:

Complete a supplementary demographic audit form, and file it, along with the regular annual circulation audit form with the Corporation. The supplementary demographic audit report shall be in conformance with these Standards and shall be the basis for the supplementary demographic audit report.

2-5 101

Upon receipt of the supplementary demographic audit form the Corporation shall make an examination of the publication's records and complete the supplementary demographic audit at the same time as the regular annual audit of the publication's circulation.

2-5 102

If it is found that the publication's records are incomplete and the supplementary demographic audit cannot be made, the media owners shall install and maintain such auditable records as recommended by the Corporation if the media owners plan media owner plans to reapply for a supplementary demographic audit.

2-5 200 Definition

2-5 201 Supplemental Question

A supplementary question is defined as a question eliciting any data regarding a respondents' purchasing authority and/or multiple response categories, or any data which relates to purchasing authority of only a specific portion of the qualified subscriber file.

2-5 300 Reporting Options

A publication member who has successfully completed a supplementary audit, shall have the option of reporting supplementary data in their brand report as follows:

The initial reporting of supplementary data for the demographic breakout of qualified circulation shall be combined with the regular circulation audit report. Thereafter, the media owner may elect to report new supplementary data in their interim brand report and/or second brand report.

New supplementary data reported on the interim brand report or second brand report, shall be within one year from the date of the latest supplementary audit report.

New supplementary data may be reported on a brand report provided these data are subject to audit at the time of the next regular annual circulation audit.

A media owner who elects to report new supplementary data on their interim and/or second six-month brand report shall report their demographic breakout of qualified circulation as a separate analysis in addition to the secondary or multiple analysis of the supplementary data reported.

2-5 400 Supplementary Demographic Audit Report Forms

Members shall report their supplementary demographic on forms supplied by the Corporation.

2-5 401

In the interest of uniformity in appearance and typographical setup of the supplementary demographic audit report, BPA Worldwide will process all paragraphs requiring special typesetting, rulings, and extra pages. The publication member shall be billed for the production, services, and distribution costs.

2-5 402

The same field served and definition of recipient qualification as used in the regular circulation audit for this period shall be used in the supplementary demographic audit report. Also, the report shall contain a comment emphasizing that it should be used in conjunction with the annual circulation audit report covering the same period.

2-5 403 Supplementary Analysis of Demographic Breakout of Qualified Circulation

Shall contain a secondary or multiple analysis of the number of copies by one or more of the following type of classifications, either as separate totals or in a cross-tabulation breakout:

Type of business or products

Type of products approved, purchased, recommended or specified

Job titles of recipients

Job functions of recipients

Any other demographic of recipients

2-5 404

Each supplementary analysis shall report the number of respondents to the supplementary question being analyzed. These data may be reported as notations in paragraph 3a or in additional columns for each category in the analysis. For the purposes of the supplementary analysis under this Section, the number of negative responses ("no" or "none of the above") and non-respondents may also be reported separately.

If a media owner chooses not to report negative responses, then the negative respondents shall be removed from the respondent notations in business/occupational or markets served table.

If a media owner chooses not to report a specific category in the supplementary analysis, respondents that only responded to that category shall be considered negative responses.

For example, the following is an acceptable format for reporting:

	REQUIRED	OPTIONAL	OPTIONAL
Total Qualified	Number of respondents who buy, approve, recommend or specify	Number of respondents who do not buy, approve, Recommend or specify	Number of respondents who did not answer the question
10,000	9,000	700	300

2-5 405

The reporting of percentages shall be optional. However, when percentages are used in a supplementary analysis the percentage based on the number of respondents can be reported at the media owner's option.

If the media owner opts to report percentages based on the number of respondents, the following applies:

The total qualified circulation shall be reported;

The percentage based on the total qualified circulation shall be reported;

To be allowed to report supplementary question percentages by respondents, a minimum response rate of 85% to each supplementary question is required;

The “None of the Above” respondents may not be omitted from the analysis; and

All categories of multi-response questions shall be included in the analysis.

When adding a new category of response, the response rate of that category shall be reported in a footnote.

2-5 406

A publication member may elect to cross-tabulate supplementary demographic information by any paragraph reported on the BPA Worldwide brand report provided the data reported for such paragraphs are based on actual counts and presented in a clear and concise manner so that there will be no confusion about the data reported.

2-5 407

If a media owner wishes to report total extrapolated data based on a company, unit or firm level (where multiple employees provide data for one location), then a unit or firm audit shall be conducted and the data extrapolation shall be based on the unit or firm data. The media owner has the option to report unit or firm data.

2-5 408

The analysis shall be based on the May/November issues. A publication on a June audit schedule would analyze the May issue while a publication on a December audit schedule would analyze the November issue.

2-5 409

Classifications which are reported as subtotals will be arranged so that there will be no confusion about the exact number of products, functions or other demographics being reported. Grand totals of supplementary classifications shall not be reported under any circumstances.

2-5 410

A publication member may elect to analyze a particular demographic classification or group of classifications. If they exercise this option, the audit shall clearly indicate the particular demographic classification included in the supplementary analysis and shall also report the number of copies in the remaining classifications included in the total qualified circulation for the issue analyzed.

2-5 411 Qualification Source Breakout

Shall contain an analysis of the qualified circulation by source. Media owners have the option to report age of source of the non-paid circulation using one, two, and three year columns and shall be repeated from the regular circulation audit and be in conformance with the Standards for reporting these data.

2-5 412 Mailing Address Breakout (Optional)

Publication members electing to use a demographic audit may complete paragraph 3c - Mailing Address Breakout - in the regular circulation audit.

2-5 413 Geographical Breakout

Publication members electing to use a supplementary business/occupational audit shall complete paragraph 4 - Geographic Breakout - in the regular circulation audit.

2-5 500 Questionnaires Used to Elicit Supplementary Demographic Data

2-5 501

For supplementary questionnaires eliciting buying influence data only, a "yes/no" or "none of the above" format is acceptable.

The following are acceptable examples of these two options:

"Do you recommend, purchase, specify or approve any of the products listed below?

[] YES [] NO

"Do you recommend, purchase, specify or approve any of the products listed below (check all that apply):

[] Product X

[] Product Y

[] Product Z

[] "None of the Above" [would be the last category listed].

When eliciting multiple buying influence data through a telemarketing campaign, the "None of the Above" response category is not required if a 'Yes/No' format is used to elicit the data.

2-5 502

In cases of multiple job function/responsibility, multiple products used, or multiple areas of work involvement, the use of "Other (please describe) . . ." is permissible. However, use of this format shall be approved by BPA Worldwide in advance.

The following examples are acceptable uses of this option:

"Please indicate the following job functions which you perform (check all that apply):"

[] Function X

[] Function Y

[] Function Z

[] "Other (please describe) _____ "
[would be the last category listed].

"Which of the following products do you use in the course of your work? (check all that apply):"

[] Product X

[] Product Y

[] Product Z

[] "Other (please describe) _____ "
[would be the last category listed].

2-5 503

Questionnaire forms used to elicit supplementary demographic data shall be submitted to BPA Worldwide for approval. BPA Worldwide's approval will be given to any questionnaire which is consistent with the analysis to be reported.

Telephone interview forms shall contain adequate instruction to the telephone interviewer (outbound calls) or to the recipient (inbound calls). In addition, media owners shall be responsible for maintaining the following records which are to be made available to the auditor at the time of audit and/or during random visits:

- a. All telephone company invoices.
- b. All computer generated data including summaries by date of calls received, telephone numbers of calls placed and received, and computer logs of tasks performed.

- c. Recordings, where permitted and available, shall be periodically monitored by the auditor to verify adherence to the BPA Worldwide approved interview form and the proper recording by the interviewer of the recipient's response.
- d. Whenever conversations are tape recorded, the recipient shall be advised at the outset of the call that it will be recorded. Monitoring of live interviews also may be conducted for the same purpose.

The media owner shall be responsible for the documentation and accuracy of the data collected through telecommunications, including those requests obtained through outside telemarketing firms.

The auditor will compare and cross-check all records and make any other tests deemed necessary, including follow-up telephone/fax contact and/or test mailings, for complete and accurate authentication of the information. The media owner shall be rebilled for the costs incurred for any special tests conducted by BPA Worldwide or its agent.

2-5 504

Each questionnaire shall be adequately identified and dated to permit the auditor to be satisfied of their authenticity and acceptability.

2-5 505

A reproduction of the questionnaire may be included in the supplementary audit report.

2-5 506

A physical count of the mailing list for the issue analyzed shall be made by the media owner of the supplementary demographic classifications in each geographical area.

2-5 507

Qualification evidence shall be available to the auditor to support any additional data reported in the supplementary demographic audit as well as the qualification material required for the regular annual circulation audit. This proof may be no older than three years from the date of the issue analyzed.

2-5 508

The preparation, maintenance, and availability of all requirements and records which are necessary for a supplementary demographic audit as stated in these Standards shall be the responsibility of the media owner. The employment of outside agents or firms for any or all-supplementary demographic audit work does not relieve the member of their responsibility.

2-5 509

All records necessary for an audit shall be retained by the media owner until the next supplementary demographic audit has been completed or for a period of not less than three years.

2-6 UNIT AUDIT

2-6 100 Eligibility

A publication member in good standing may add unit information with the regular circulation.

2-6 101

The Corporation shall make an examination of the publication's records and complete the unit audit at the same time as the regular annual audit of the publication's circulation.

2-6 102

New unit data reported on the interim Brand Report or analyzed Brand Report, shall be within one year from the date of the latest unit audit report.

New unit data may be reported on a brand report provided these data are subject to audit at the time of the next regular annual circulation audit.

2-6 103

If it is found that the publication's records are incomplete and the unit audit cannot be made, the media owner shall install and maintain such auditable records as recommended by the Corporation if they plan to include unit data at a future date.

2-6 200 Definition of a Unit

A unit shall be defined as an establishment, primarily engaged in one type of economic activity, at a single physical location.

Under this general definition, the unit audit will provide standard unit definitions for each field of publishing. If two or more competing publications apply for a unit audit, they will be asked to agree on the definition of a unit for their particular fields of publishing.

2-6 300 Unit Audit Report Forms

Publication members shall report their unit breakouts on forms supplied by the Corporation.

In the interests of uniformity in appearance and typographical setup of the unit audit report, BPA Worldwide will process all paragraphs requiring special typesetting, ruling, and extra pages. The publication member shall be billed the production, services, and distribution costs.

2-6 400 Unit Analysis of Business/Occupational Breakout of Qualified Circulation

Shall contain a breakout of the total number of copies and units by one or more of the following types of classification, either as separate totals or in a cross-tabulation breakout:

Type of business.

Size or volume or number of employees.

Job title of recipient.

Job function of recipient.

Penetration copies.

Classifications which are reported as subtotals will be arranged in such a way that no confusion can occur about the exact number of units being reported.

2-6 401

The analysis shall be based on the May/November issues. A publication on a June audit schedule would analyze the May issue while a publication on a December audit schedule would analyze the November issue.

2-6 402

Qualified recipients at the same unit shall have all their location specific data uniformly classified based on a methodology approved by the CEO of BPA.

2-6 403 Qualification Source Breakout

Shall contain an analysis of the qualified circulation by source. Media owners have the option to report age of source of the non-paid circulation using one, two and three year columns.

2-6 404 Unit Analysis of Geographical Breakout of Qualified Circulation

Shall contain a breakout of the total number of copies and units by region, or optionally by county, state, province, nation, or other accepted geographical area. The issue analyzed shall be the same one chosen for the business/occupational breakout.

2-6 405

Publication members electing to analyze a particular business/occupational classification or group of classifications shall abide by the following standards:

All qualified circulation in each selected classification shall be assigned to a unit.

The audit shall clearly indicate the particular business/occupational classifications reported by units and shall report the number of copies in every classification included in the total qualified circulation for the issue analyzed.

Separate columns shall be used in the geographical breakout to indicate the part of the qualified circulation which is analyzed by units and the part not analyzed by units.

2-6 500 Audit Requirements

A physical count of the mailing list for the issue analyzed shall be made by the media owner of the number of business/occupational units in each geographical area.

2-6 501

A cross-reference filing system may be required for each recipient assigned to a unit.

2-6 502

Qualification evidence shall be available to the auditor to support any additional data reported in the unit audit as well as the qualification material required for the regular annual circulation audit. This proof may be no older than three years from the date of the issue analyzed.

2-6 503

The preparation, maintenance, and availability of all requirements and records which are necessary for a unit audit as stated in these Standards shall be the responsibility of the media owner. The employment of outside agents or firms for any or all unit audit work does not relieve the media owner of their responsibility.

All records necessary for an audit shall be retained by the media owner until the next unit audit has been completed or for a period of not less than three years.

SECTION III MEMBERSHIP AND OBLIGATIONS

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BPA WORLDWIDE MEDIA AUDIT STANDARDS

3-1 100 OBLIGATIONS OF MEMBERSHIP

3-1 101

All members shall comply with the Bylaws and Standards of the Corporation.

3-1 102

Should it be necessary for the Corporation to take any action, whether internal or by litigation, to enforce any Bylaw or Standard, or to collect any monies due it, the member or former member against whom such action is taken shall be responsible for and shall pay to the Corporation all costs and expenses incurred by the Corporation in connection with such action, including, by way of illustration and not limitation, the cost of auditor's and other staff time spent in connection with the enforcement procedure, postage, printing, supplies, reasonable attorney's fees, whether incurred in an internal enforcement procedure or in litigation in the courts or before an arbitration tribunal, and legal disbursements.

3-1 103

Should it be necessary for the Corporation to participate in a legal proceeding as a witness, the member or former member for whom such action is taken shall be responsible for and shall pay to the Corporation all costs and expenses in connection with such action. This includes, by way of illustration and not limitation, the cost of auditor's and other staff time charged at a rate established by the Board of Directors, postage, reproduction, supplies, and reasonable attorney's fees. This is applicable whether incurred to respond to a subpoena, or appear for deposition, litigation in the courts, an arbitration tribunal, or any other legal proceeding.

3-1 104

Should any member, or vendor to a member providing information for the member's audit, employ BPA personnel within three months of having conducted that member's audit, or internal audit review, the Corporation shall conduct a review of the audit at the cost of the Corporation. If such review presents issues requiring a re-audit, one shall be conducted. If the re-audit results in adjustments to the previously audited circulation, the member, or associate member, involved shall pay to the Corporation all costs and expenses (travel and otherwise) in connection with conducting such re-audit.

3-1 105

If any engagement cannot be completed within thirty calendar days from its start because of the failure of the member to either maintain or provide necessary documents required by the Bylaws and Standards, the CEO of BPA will review the engagement and shall have the authority to suspend services to the member until the engagement is completed, and the CEO of BPA may issue a bulletin to the BPA Worldwide membership to that effect.

3-1 106

Services shall be suspended by the CEO of BPA for any publication whose audit takes over 75 days to complete or such further time as granted by the CEO of BPA. The media owner may appeal the CEO's decision in writing to the Executive Committee of the Board of Directors within seven days from receipt of the CEO's decision. The decision of the Executive Committee shall be final. In the event of suspension, a notice shall be posted on BPA's web site and/or released to the membership and the media owner may not publicize any circulation data until the successful completion of that audit.

3-1 107

Members seeking audit/compliance/assurance must install, maintain and make available to the staff of the Corporation at all times, true and correct records capable of being verified/audited in accordance with the established Standards of the Corporation.

3-1 108

Members shall file true claims and statements regarding their properties, products or services to be verified or assured with the Corporation in accordance with the Standards of the Corporation. These claims and statements shall be attested to by a duly authorized representative of the member. Each report issued to the members shall contain figures and facts bearing on the members' compliance with industry standards for their properties, products or services. These reports shall be released and distributed promptly by the Corporation and audited by the Corporation in accordance with its Standards.

3-1 109

Duly authorized representatives of the Corporation shall have the right of access, at any time, to all records deemed necessary by the Corporation to accomplish the objects of the Corporation. By way of illustration but not of limitation, such access may be required by the Corporation:

- ... to make an engagement.
- ... to confirm any details of a claim submitted to the Corporation, whether that claim has been released or not.
- ... to investigate the accuracy of a report or claim already released.
- ... to obtain information which, in the opinion of the CEO of BPA, may be pertinent to a future claim or report.

3-2 ELIGIBILITY FOR MEMBERSHIP

3-2 101 Media Owners

Eligibility for membership for each type of media channel applying for membership is defined within each respective classification section.

3-2 102 Marketers

Marketer members shall qualify as stated in Section B2.0 of the Bylaws and be defined as companies that market or advertise properties, products or services and are interested in third-party verification and assurance.

Marketers and advertising agencies, in addition to, or in lieu of, one overall company membership, may obtain a separate membership for any one or all of their branch offices, divisions or subsidiaries. Each separate membership shall carry with it all of the privileges and obligations of membership set forth in the Bylaws and the Standards promulgated by the Board of Directors.

3-2 103 Associate Membership

Industry service providers, companies or individuals, applying for associate membership shall qualify as stated in Section B2.0 of the Bylaws and shall conform to the following requirements:

Provide the names and contact details of three professional references that can attest to the applicant's successful completion of BPA Worldwide related projects. It is allowable to provide one reference if a minimum of three projects were completed.

Associate members who maintain successful ongoing completion of BPA projects are permitted to renew their membership on an annual basis.

Reviews of performance will be completed for any associate member's work that negatively impacts BPA members or the industry. Those associate members who are found to be negatively impacting BPA members or the industry will be reviewed under Section B9.0 of the Bylaws (offenses and penalties).

3-3 APPLICANT PROCEDURE

3-3 100

Application for and Acquisition of Membership Status

Each applicant for membership shall deposit with the Corporation the fees as determined by the Board of Directors. For those applicants requiring audit/compliance/assurance, the CEO of BPA shall screen the application and within a reasonable time after the receipt of the application and deposit, shall determine whether the applicant's records are adequate for audit/compliance/assurance purposes in accordance with the standards and requirements of the Corporation.

If the applicant's records are inadequate the CEO of BPA shall request the applicant to install and maintain records in accordance with the Standards of the Corporation. If the applicant refuses to do so, or has failed to do so within the time limits imposed by the CEO of BPA, or if the application is withdrawn, the application shall automatically be rejected and the entire fee deposited with the application, shall be forfeited to the Corporation.

3-3 101

An applicant eligible for membership in BPA Worldwide shall, in addition to filing an application, proceed as follows:

Fill out and sign an appropriate submission statement for the service to be performed and file it with the Corporation.

All reports filed with the Corporation shall be in conformance with the appropriate sections defined in these standards and shall be the basis for any initial audit report.

Provide, maintain and make available to BPA staff, all requirements and records as stated in these Standards.

On receipt of the applicant's first claims, the corporation shall, as soon as possible, make an examination of the applicant's records and complete an initial audit.

3-3 102

The CEO of BPA shall cause an audit/compliance/assurance engagement to be made of the applicant's records in accordance with the Standards of the Corporation. Upon the successful completion of the engagement, the applicant will be admitted into membership.

3-3 103 Applicants with Single Copy Sales

For auditing single copy sales final settlement figures shall be available for at least half the issues in the period. The balance of issues may be projected based on a historical average of the settled issues.

Examples of three-month initial audit eligibility dates:

Weekly publications shall have seven issues settled

Monthly publications, one issue shall be settled

Bi-monthly publications shall have one issue settled

Quarterly publications shall settle one issue

Semi-Annual and Annuals shall be settled

An established publication may project single copy sales for any issue in the three-month initial audit period so long as a documented record of at least six prior months of net sales is available.

For auditing single copy sales for newspapers, if final single copy sales figures are not available at the time the circulation claim is filed, the media owner may project single copy sales using the preceding twelve months of final sales figures and applying the sale percentage to the draw for each issue.

3-3 104 Website Applicants

A website applying for BPA services shall complete an application and contract for such services.

On receipt of the application the corporation shall, as soon as possible, forward instructions to the applicant, complete an initial tag code audit, verify the code has been added to every web page, and ensure the collected data is accurate.

3-3 105 Notice of Admittance

Upon acceptance and release of a Brand Report or letter of assurance by BPA, the applicant shall be notified that they have been admitted into membership.

3-3 106

If it is found that the media owner's records are incomplete and the initial audit cannot be made, the media owner shall be required to install and maintain such auditable records as recommended by the Corporation. A Brand shall not become a member until an auditable report or claim is submitted and the records are audited in accordance with the instructions from the Corporation (See Bylaws, Section B.2.1.4).

3-3 107

If the CEO of BPA finds, after a sufficient time has elapsed, that the applicant's records are incomplete and an acceptable initial audit cannot be made, BPA Worldwide may release a notice to its members officially notifying them that the application has been rejected. This notice may take the form of a posting on BPA's website and/or a mailing to the membership and BPA's press list.

3-4 100 TRANSFER OF MEMBERSHIP

Membership shall not be transferable unless the following conditions are met:

The member seeking the transfer is in good standing.

The records of the member have been approved by the CEO of BPA.

The purchaser of the member entity executes and files a transfer of membership form with the Corporation.

All outstanding charges owed by the member entity to be transferred have been paid in full.

Prior written approval from the CEO of BPA of BPA Worldwide is obtained.

3-5 100 ONSITE or CROSS BORDER AUDITS

3-5 101

Whenever it is necessary for BPA to perform an audit in a country where BPA does not have an office, fees for services shall be charged based on prevailing rates as established by the Board of Directors for that region.

In addition, BPA shall invoice for the "economy or coach" air travel costs of BPA staff, computed from the staff's departure point to the actual location where the audit is conducted.

3-5 102

A member requesting an overseas or out-of-country audit in countries without a BPA office shall make an advance payment to BPA Worldwide of the estimated charge.

3-5 103

BPA Worldwide may also require a media owner member requesting an overseas or out-of-country audit to sign a contract for such audit, the form of which may be fixed by the Board of Directors from time to time, but in any event shall include the substantive provisions of this Section.

3-5 104

Should any member in the United States request BPA staff to perform their audit on site or at a third-party location, the member shall pay the following fees and charges for such an audit:

The normal auditing and additional hourly charges for the media brand, in accordance with Section B3.0 of the Bylaws.

The “economy or coach” air travel costs of the auditor, computed from the auditor’s departure point to the actual location where the audit is made.

Hotel and ground travel expenses incurred during the course of conducting the audit.

The above does not pertain to newspaper brands or U.S. applicants for membership who request an auditor to perform the initial audit on site or at a third-party location

3-6 AUDIT PROCEDURES

3-6 101

The auditor shall examine all available records pertaining to circulation, distribution, etc. as required in the Standards.

3-6 102

Mailing/subscriber list/labels, circulation qualification records and other lists shall be counted and tested to verify analysis of circulation.

3-6 103

Officers and employees concerned with circulation may be questioned with regard to work on the records in their charge.

3-6 104

The auditor may compare and crosscheck data from these various sources, conduct confirmations and make any other tests considered essential to the complete and accurate authentication of the audit report.

The media owner shall be billed for the costs incurred for special tests considered to be essential to complete the audit.

3-6 105

The auditor may visit the printer's plant and bindery and secure records pertaining to the publication; and may also visit the mailing room or any other department or plant that is concerned with the production or mailing of the publication. For these purposes the cooperation of the media owner shall be expected.

3-6 106

Should it be deemed necessary by the representatives of the Corporation, they shall be permitted by the member to remove pertinent records from the member’s place of business for review and analysis at the office of the Corporation.

3-6 107

If it becomes necessary for an auditor to remove from the media owner's premises any receipts, documents, etc., the auditor shall be required to have two identical receipts signed by the auditor and the media owner or a media owner's representative listing the material taken. One receipt is to be kept by the auditor and the other by the media owner with both receipts to be destroyed upon the auditor's return of the material.

3-7 MEMBERSHIP ADVISORIES OF CORRECTION

3-7 100

As a result of an audit, whenever there has been a substantial change in the data as reported originally in the BPA report, a Membership Advisory of Correction shall be issued by BPA Worldwide." It shall be posted to the BPA Worldwide website (www.bpaww.com) and distributed to members that request copies of printed reports. Prior to the issuance of a membership advisory, however, the media owner shall be notified by registered mail or other courier mail (return receipt requested) of the auditor's findings, and shall have 10 calendar days to appeal the auditor's findings prior to the release of a Membership Advisory of Correction. In the event of an appeal, the auditor's findings will be reviewed by the CEO of BPA. If the media owner disagrees with the decision of the CEO of BPA, they may, within 10 calendar days, request a further review by the Board of Directors.

The media owner shall be billed a fee for the issuance of the Membership Advisory, as set from time to time by the Board of Directors.

3-7 101

Whenever Membership Advisories of Correction are issued for a member for two sequential years for any reason, or audit reports are issued for three sequential years due to errors and omissions within the same BPA brand report paragraph (i.e. qualification source and age) that have been brought to the attention of the member in the previous audits, the Corporation shall not release the subsequent report without auditing it first. The media owner shall be billed the audit charge for this special audit in accordance with rates as established from time to time by the Board of Directors. In addition, the matter will be brought to the attention of the Executive Committee for a review of the membership status of the media for possible further action as provided for under Section B9.0 of the Bylaws.

3-8 SPECIAL THREE OR SIX MONTH AUDIT

3-8 100

A publication or newspaper may request the CEO of BPA to provide a special three or six month audit ending with a month other than June or December, (July and January for physician journals). If in the CEO's judgment, circumstances warrant the audit and the publication/newspaper meets the following conditions:

The publication's or newspaper's request for the special three or six month audit shall be in writing explaining the reason for the audit.

The publication or newspaper shall pay the regular auditing charge for the special audit.

A publication or newspaper, which has chosen a period ending with a month other than June or December (July and January for physician journals) for its special three or six month audit report, shall transfer back to the standard June or December schedule (July and January for physician journals) with its first brand report following the special three or six month audit report, and include whatever previously audited issues are necessary to complete the six month period.

The publication or newspaper may continue to audit on its original audit cycle, or, with approval of the CEO of BPA, the audit cycle may be changed.

Any special three or six month audit will issue an official Audit Report.

3-9 PUBLICITY

3-9 100 GENERAL COMPLIANCE

3-9 101

The Corporation has rights in the Corporation's name, trademarks and figures appearing in the Corporation's released publications, magazines, newspaper, or other brand channel statements and reports (hereinafter referred to as "The Corporation's rights").

3-9 102

The Corporation owns the copyright in all statements, reports, and publications, magazines or other brand channels either filed with or published by the Corporation including, without restricting the generality of the foregoing, all BPA Reports, defined as, Brand Reports, Distribution Statements, Brand Reports, Corrected Brand Report, Audit Reports, Management Letters and Bulletins. By executing the Application for Membership, each member thereby assigns and transfers to the Corporation any right, title or interest, whether in copyright or otherwise, that such member may have now or in the future in any data or information provided to the Corporation.

3-9 103

The proper and widest possible use of the Corporation's rights is highly desirable. The use by a member of the Corporation's rights implies that the Corporation has approved or authorized their use in the form as used. Members should, therefore, contact the Corporation if they wish to use the Corporation's rights in a manner other than as set out in these Standards and Regulations.

3-9 104

As every member has an interest in protecting the Corporation's rights, the Corporation has set out the following guidelines relating to the use of the Corporation's rights. Although they are not designed or intended to restrict legitimate and proper use, they are set down to protect the integrity and reliability of the Corporation, the Corporation's rights and the audited circulation figures published by it.

3-9 105

Rights in the logos or trademarks are owned only by the Corporation and the right to use the logos or trademarks is a privilege of membership. The use by a member of a logo or trademark carries the implication that the Corporation has approved the advertising or document in which the trademark appears. Unauthorized or improper use of the logos or trademarks may be harmful to the Corporation, the Corporation's rights and its members, and may result in the loss of the right of the member to the use of the logos or trademarks. A member shall make clear that the use of the logos or trademarks by the member is only as a member of the Corporation and there shall be no suggestion or implication that the member owns any rights in the logos or trademark.

3-9-106

As it is not possible to set out the many different uses of logos or trademarks that could be proper or improper, a member who wishes to use the Corporation's logos or trademarks in a manner other than as set out in these Standards and Regulations or is in doubt as to proper use should contact the Corporation for advice.

3-9 107

A member shall not disseminate nor permit to be disseminated on its behalf any fraudulent, inaccurate or misleading claims with respect to any aspect of its reporting of its properties, products or services or that of another member, whether such dissemination is in the form of marketing material, letters or internal memoranda. A violation of this section may constitute both a violation of these publicity Standards and an offense which is subject to Section B9.0 of the BPA Bylaws.

3-9 108

The provision of the Bylaws and Standards relating to publicity shall apply equally to applicants for membership.

3-9 109

A member shall not reproduce correspondence with or literature of the Corporation, or excerpts there from, unless specific written permission to do so is obtained from the CEO of BPA. This includes correspondence between BPA Worldwide and the parties to a formal complaint.

3-9 110

A member shall not make any false, fraudulent or misleading statements as to any aspect of circulation, distribution or coverage. If questions arise concerning whether a document, advertisement, promotional material or written/electronic communication is misleading, a determination shall be made by the BPA Worldwide CEO of BPA or designated agent, based on all available information.

A member shall not attribute BPA Worldwide authority, stated or implied, to any products, unless such products are traceable to a reporting tool on the BPA website.

3-9 111

No BPA report shall be released until the audit report for the previous audit year has been completed and released by BPA Worldwide.

3-9 200 APPLICANTS

3-9-201

An applicant may publicize the fact that they have applied for membership. However, if an applicant who has publicized this fact fails to become a member within six months after the date of its application, or within such further time as may be granted by the CEO of BPA, the application shall be automatically rejected and the fees on deposit shall be forfeited to the Corporation.

3-9 202

Applicants may not use the BPA Worldwide logo until they have successfully completed their initial audit and have been voted into membership by the Board of Directors.

3-9 203

A media owner whose membership in BPA Worldwide has been terminated for violation of Section B9.0 of the Bylaws and who reapplies for membership may not publicize the fact that they have reapplied for membership, and shall complete their initial audit within six months of the reapplication date.

3-9 204

An applicant whose application for membership has been rejected by the Corporation in accordance with Section B2.2.3 of the Bylaws and who reapplies for membership within one year of the date of rejection may not publicize the fact that they have reapplied for membership and shall complete their initial audit within six months of the reapplication date.

3-9 205

If a media owner reapplies for membership after the one-year anniversary of the rejected application, the media owner shall use the term “re-applied for membership mm/yy,” and will have the full twelve-month term to complete their initial audit.

3-9 206

If a media owner reapplies for membership three years after the application rejection date, no reference to reapplication is required.

3-9 300 FILING PUBLICITY COMPLAINTS

3-9 301

A complaint charging a member with a violation of any of the Publicity Standards may be initiated by any member, manager, officer, or the CEO of BPA.

3-9 302

All formal publicity complaints are considered confidential between the parties involved and BPA Worldwide, unless and until such complaints are resolved in a manner that calls for public notice either by BPA Worldwide or the complainee. Media owners are enjoined not to reproduce any correspondence pertaining to a formal complaint without prior written permission of BPA Worldwide. It is the responsibility of a media owner to ensure that the media owner's staff does not publicize a complaint beyond the scope allowed by these standards.

3-9 303

To initiate a complaint, a complainant shall:

- a. Submit to the CEO of BPA a written statement of the facts upon which the complaint is based and the Section of the Bylaws and Standards claimed to have been violated. A complaint shall only be lodged concerning a promotion distributed within the 12 months preceding the date of the complaint.
- b. This statement shall be limited to the actual facts and shall include copies of all documents upon which the complainant relies including copies of BPA reports when pertinent.
- c. The complaint shall be accompanied by a non-refundable filing fee as established by the Board of Directors to help cover BPA Worldwide's processing costs. No complaint shall be considered or acted upon unless the fee is paid in advance.

3-9 304

An appeal from the CEO's decision shall be accompanied by a filing fee as established by the Board of Directors to cover the additional costs of preparing the file for review by the Publicity Policies Subcommittee of the Board of Directors. No appeal shall be considered or acted upon unless the fee is paid in advance.

3-9 305

Upon receipt of a complaint, the CEO of BPA shall deliver or send to the complainee a copy of the complaint and all the documents upon which the complaint is based.

3-9 306

The CEO of BPA shall have all complaints investigated without delay and shall, if warranted in the CEO's judgment, attempt to resolve the complaint informally.

3-9 307

To answer a complaint, the complainee shall submit to the CEO of BPA, within five business days of the receipt of the complaint, a statement of the facts upon which they rely to rebut or to mitigate the complaint. The answering statement shall be limited to the actual facts and shall include copies of all documents upon which the complainee relies, including copies of BPA reports when pertinent.

3-9 308

It shall be the duty of a member to cooperate fully in any such investigation including, if necessary, making all pertinent records available for such investigation.

3-9 309

Upon receipt of the answering statement, the CEO of BPA shall deliver or send to the complainant a copy of the complaint and of all the documents upon which the complaint is based.

3-9 310

If the complaint is not settled informally, the CEO of BPA shall determine whether or not a violation of the publicity standards has occurred and what action, if any, shall be taken. By way of illustration and not limitation, the CEO of BPA may direct that a bulletin to the membership be issued or that the member discontinues the dissemination of or modify the item about which the complaint was made.

3-9 311

If the CEO of BPA decides that no violation has occurred, the CEO of BPA shall advise all parties to the matter in writing. The CEO's decision shall be final unless a member appeals, in writing, to the Publicity Policies Subcommittee within five business days from the receipt of the CEO's decision in which event, the complaint shall be further processed as provided hereafter. If a member does not file an appeal within the time limit specified, no further action shall be taken.

3-9 312

If the CEO of BPA decides that a violation has occurred, the CEO of BPA shall, in writing, advise the member against whom the complaint was made of the decision and shall include with the decision a copy of any bulletin to be issued to the membership. The CEO's decision shall be final unless the member against whom the complaint has been made appeals in writing to the Publicity Policies Subcommittee of the Executive Committee within five business days from the date of the receipt of the CEO's decision, in which event, the complaint shall be further processed as provided hereafter.

3-9 313

In the event an appeal is taken from the CEO's decision, the CEO of BPA shall present all of the facts pertaining to the alleged violation to the Publicity Policies Subcommittee of the Executive Committee, and by vote of the majority of its members, the Publicity Policies Subcommittee of the Executive Committee shall have the authority to affirm, disaffirm or modify the decision of the CEO of BPA and its decision and determination shall be final.

3-9 314

Violation of any provision of these Standards pertaining to publicity may be brought to the attention of the entire membership. To cover the cost to BPA Worldwide of processing and administering the complaint and of the printing and distribution of the correction bulletin, a member found to be in violation of the publicity standards shall reimburse BPA Worldwide for its expenses.

3-9 315

Any bulletin issued to correct the record with respect to Publicity Standards Violations shall have printed thereon the following legend:

"This bulletin is issued to correct the record and does not constitute an official censure as provided in Section B9.0 of the Bylaws."

3-9 316

The issuance of a bulletin to correct the record shall not preclude or be in lieu of any action by the Executive Committee or Board of Directors under Section B9.0 of the BPA Bylaws with respect to the violation. In every case in which a bulletin to correct the record is released, the case shall be reviewed by the Executive Committee at its next meeting to determine whether further action shall be taken under Section B9.0 of the BPA Bylaws.

3-9 317

In lieu of the correction bulletin, the CEO of BPA may authorize the issuance (at the media owner's expense) of a letter by the media owner containing the substantive comments which would be included in a correction bulletin issued by BPA Worldwide. The text of the letter shall be approved by the CEO of BPA and may not contain any statements deemed promotional. It shall be mailed by BPA Worldwide to the media owner's entire promotion list, and/or to the recipients of the offending document, and/or to the entire BPA Worldwide membership.

3-9 318

Complainants have the option of having BPA reprint a complainee's letter of correction and distribute the letter to the complainant's advertiser/agency list. This shall be at the expense of the complainant. The reprint will carry an imprint informing recipients that the notice has been reprinted at the request of the complainant.

3-9 319

When violations of a serious nature are found within promotional materials, wide distribution will be assumed unless the media owner can provide to BPA Worldwide, evidence to the contrary. When proper evidence cannot be provided, BPA Worldwide will require distribution of a letter of correction from the media owner to the media owner's entire advertiser and advertising agency sales and promotion list.

3-9 320

If a media owner claims a promotion found to be in violation had limited distribution, but evidence later proves wider distribution in fact existed, a letter of correction shall be mailed by the member to the media owner's entire advertiser/agency promotion list. BPA Worldwide may, if instructed by the CEO of BPA, distribute a notice of violation to the BPA Worldwide membership.

3-9 321

If an advertisement on behalf of a media owner is found to be in violation of these standards and warranting public correction, the appropriate remedy shall be a correction in the medium as the original ad, e.g., SRDS, BRAD, CARD, or the brand channel itself. Insertion orders of the corrected advertisement shall be placed within 30 days of the staff decision.

3-9 322

If a promotion by a media owner on the Internet or website is found to be in violation, the appropriate remedy shall be a correction on the Internet or same website for the greater of a period of thirty days or the same time period as the promotion was available.

3-9 323

BPA Worldwide shall post all violations of Section 3-9 of these standards on its website www.bpaww.com for a period of 30 days following the deadline for appeal, or resolution by the Publicity Policies Subcommittee or Board of Directors. There shall be no further distribution of a downloaded and printed version of this notice without permission of BPA Worldwide.

3-9 324

Any bulletin regarding publicity violations released by the Corporation may be reprinted by the Corporation at the request of any member who shall be billed the charges incurred for the reprint. Reprints shall have a special imprint at the top of the notice to identify the member distributing it. The imprint shall read as follows:

This exact copy of an original Notice to Correct the Record which has been sent to the entire BPA Worldwide membership is now being distributed by

3-9 325

Any member may distribute the reprints described in Section 3-9 622 subject to the following conditions:

No covering letter or printed material may accompany the Notice to Correct the Record when distributed by a member of the Corporation.

No comment about the Notice shall be made by a member of the Corporation in any letter or literature that may be distributed separately from the Notice.

The reprint may not be distributed by any member after thirty days of the date of its issuance by BPA Worldwide.

3-10 COMPLAINT PROCESS FOR ALL OTHER MATTERS

3-10-1

Should any member file charges against any other member, or should any officer, director or the CEO of BPA have reason to believe that any member has been guilty of any offense enumerated in the Bylaws or these publicity standards, the CEO of BPA shall cause an investigation to be made without delay.

3-10-2

It shall be the duty of a member to cooperate fully in any such investigation including, if necessary, making all its records available for such investigation.

3-10-3

If, in the opinion of the CEO of BPA, no offense enumerated in the Bylaws or Standards has occurred, the CEO of BPA shall so notify the complaining member, and no further action shall be taken. If the complaining member is still of the opinion that an offense has occurred, they may appeal to the Executive Committee.

3-10-4

If in the opinion of the CEO of BPA an offense has occurred, the CEO of BPA shall have served upon the member involved a copy of the complaint made against them.

3-10-5

The complaint shall be served upon the member either personally, by leaving the same at the member's business address as registered with the Corporation during business hours or by mailing it to said member at its business address by email, mail or courier.

3-10-6

Said member shall have ten calendar days, or such further time as the CEO of BPA may grant, from the date of the service of the complaint or charges to answer the same. The answer shall be in writing signed by the accused member.

3-10-7

All decisions of the Executive Committee and of the Board of Directors with respect to any complaint made against a member, shall be served on such member, in writing, either personally, by email, mail or courier, directed to the member's address as registered with the Corporation, and the date when personal service is made, email has been received, or when the mail or courier package is signed for at the place of business of the member, shall be the date which shall start the time to appeal running, as provided to hereinafter.

3-10-8

The Executive Committee at a regular or special meeting subsequent at the close of the ten calendar day period in which the answer was due, shall proceed to consider the charge or charges and make its decision. Ten calendar days written notice of such meeting shall be sent to the accused member. The accused member shall be entitled to be present at the meeting and shall be permitted to examine or cross-examine any witnesses produced before the Executive Committee, or to present such testimony, defense or explanation as they may have.

3-10-9

The Executive Committee, by the affirmative vote of the majority of the members of the Committee present at a duly constituted meeting, shall have the authority to determine:

Whether a member has been guilty of any of the offenses enumerated herein.

The penalty to be imposed on such members.

3-10-10

In all cases where the Executive Committee finds the accused member guilty and imposes the penalty of censure, its decision shall be final and enforced immediately.

3-10-11

A bulletin announcing the censure of a member may be published and distributed to the members and such other organizations as the Executive Committee may authorize in its discretion.

3-10-12

In all cases where the Executive Committee finds the accused member guilty, and imposes the penalty of probation or expulsion, its decision shall neither become final nor publicized nor enforced until 15 calendar days after service of its written decision upon the accused member as provided hereafter.

3-10-13

The accused member, if placed on probation or expelled by the Executive Committee, shall have the right to file an appeal in writing, with the CEO of BPA, requesting that the Board of Directors review the decision of the Executive Committee. Such written appeal must be filed with the CEO of BPA no later than 14 calendar days after service of the decision of the Executive Committee on said member, or within such extended period as may be granted by the Executive Committee. Should the written appeal be filed in the time provided herein, the decision of the Executive Committee shall not be final but the Board of Directors shall review the decision of the Executive Committee at its next regular or special meeting held after the receipt of the Notice of Appeal. The Board of Directors shall have the power to affirm or disaffirm in whole or in part, the decision of the Executive Committee, and its decision shall become final immediately.

3-10-14

The affirmative vote of the majority of all members of the Board of Directors, present at a duly constituted meeting, shall be required to confirm the penalty of probation or expulsion from membership.

3-10-15

The Board may, at its own discretion, permit the accused member to be present at the meeting at which the decision of the Executive Committee is reviewed. In any event, both the accused and the complainant shall have the right to submit additional documentary evidence or written arguments to the Board for its consideration in reviewing the decision of the Executive Committee on the appeal of the accused member.

3-10-16

Should a member be found guilty of an offense and placed on probation as provided above, the Executive Committee, or the Board of Directors in the event it reviews the decision of the Executive Committee, may impose such conditions upon the member as the Executive Committee and/or the Board of Directors may, in their decision, determine to be necessary.

3-11 APPEALS FROM ADMINISTRATIVE DECISIONS

3-11 100

All appeals or requests for reconsideration of any decision by the Board of Directors, any committee, administrative officer or staff member shall be in writing. Such appeals shall be submitted to the CEO of BPA no later than fourteen days after such earlier decision was announced.

3-11 101

Such appeals shall present new facts and include such information or circumstances which justify reconsideration by the Board of Directors.

3-11 102

If the decision was the result of a complaint or request made by a member or members other than the member for or against whom the decision was made, a copy of the appeal or request for reconsideration shall be circulated to the member or members who initiated the complaint or request and to such other members as the CEO of BPA or the Board shall determine may be directly affected by any reversal or modification of the decision. Prior to the consideration and action by the Board of Directors, all such parties shall be given ten business days to respond.

3-11 103

The Board of Directors may, on its own initiative or on request from a member, reconsider a decision made by it after giving all parties, referred to in Section 3-11 102, notice and an opportunity to respond, in writing and, if the Board in its discretion so chooses, in person at a meeting at which the appeal will be considered. Upon such reconsideration the Board may affirm, modify, or reverse its prior decision.

3-11 104

Any member in good standing may request the further distribution of censure, probation or expulsion notices by the Corporation subject to the following conditions:

The release of the Notice shall be under the direct control of the Corporation.

Any member who requests further distribution of the Notice shall be billed the charges incurred for the reprinting and distribution of the Notice.

The reprint of the Notices of Censure, Probation, or Expulsion shall have a special imprint at the top of the notice to identify the member distributing it. The imprint shall read as follows:

This exact copy of an original Notice of Censure, Probation or Expulsion which has been sent to the entire BPA Worldwide membership is now being distributed by. . .

No covering letter or printed material may accompany the Notice of Censure, Probation or Expulsion when mailed by the Corporation at the request of a member.

No comment about the Notice shall be made by a member of the Corporation in any letter or literature that may be distributed separately from the Notice, nor shall any employee of such member distribute the Notice independently.

The media owner to which the Notice refers shall be notified in advance by BPA Worldwide of any additional distribution of the Notice.

The request of any member to distribute the reprint of the Notice shall be received in writing by the Corporation within thirty days from the date of its issuance by BPA Worldwide.