



Business Magazines: Reporting Standards changes, issued June 2013, effective from July 2013.

General Principles and Record keeping

	Subject	Current rule	Change to	Reason
1.	Contras	Contra Transactions. Paid copies must be excluded where: - The value of the copies is redeemed in cash, kind or by contra. - Part of the value of the copies is redeemed in cash, kind or by contra, resulting in the net contribution to the publisher falling below the minimum required by that category of circulation	Moved to each paid circulation section and reworded: There are two versions, a simple one based on cash reimbursements aimed at individual consumer categories, e.g. see retail sales 4b: <i>However cash reimbursements to the consumer must be taken into account (excluding limited low chance lottery style promotions)</i> and a clearer expanded version for corporate categories e.g. see Sponsored Subscription Sales 6a: <i>When calculating what price has been paid you must take into account:</i> - Any reciprocal payments made by the publisher - Any reciprocal charges for goods or services made by the purchaser (or the intermediary if applicable) as part of the deal (for example: for distribution or marketing). - The value of any other goods or services provided free or discounted by the publisher (for example advertising or promotional messages).	Clarity
2.	Disallowed copies	Copies for National Archives (e.g. British Library)	Remove	Harmonisation

Reported Data - None.

Retail Sales (Sale or Return)

	Subject	Current rule	Change to	Reason
1.	Name	Referred to as Newstrade	Change name to Retail Sales	Clarity
2.	Copies paid for	-	New principle 'Single copy knowingly paid for by the consumer	Harmonisation



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		-	to the retailer' Specified may be purchased by cash or other means agreed by ABC in writing	To cover possibilities such as loyalty card schemes
3.	Reporting net sale accurately	Auditable incentive for unsold copies to be returned When estimating net sale the provision reported is the number of estimated unsold copies	Incentive for unsold copies/net sale to be <i>reported</i> [not always physically returned and covers pay on scan] The estimated net sale will be reported.	Clarity Harmonisation
4.	Payment for each copy	-	Where the publisher and retailer are not 3 rd party then evidence of purchase by the consumer is required (customer magazine scenario)	Clarity
5.	Back issues	Back issues can only be claimed in the period in which the issue is reported	Back issues up to 12 months old can be claimed against the issue current at the time of sale'.	Harmonisation
6.	Publication of Cover Price	Must publish on or within every copy claimed as newstrade	Cover Price must be published on or inside front or back cover of publication	Harmonisation
7.	Minimum price	Minimum legal tender per copy	Removed, copies must be purchased	Harmonisation
8.	Price Paid	-	New principle 'Price Paid by the consumer must be clear and conspicuous'	Clarity
9.	Price Paid	-	Addition of assumption that sales by retailers will be treated as sales at the cover price unless there is evidence to the contrary.	Clarity
10.	Publisher controlled promotions	If a package is only available on the newstrade must register the allocation of the price with ABC	Remove	Harmonisation
11.	Publisher controlled promotions	Provisions must be made for voucher redemption where a promotional scheme extends over different reporting periods.	New allowance to use wash through basis if reporting on a monthly basis and effect on figures is less than 2%	Harmonisation



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Retail Sales (Limited Sale or Return)

	Subject	Current rule	Change to	Reason
1.	Name	Referred to as newstrade	Retail Sale	Clarity
2.	Relevant changes as above for Sale or Return.			

Retail Sales (Firm Sale)

	Subject	Current rule	Change to	Reason
1.	Name	Referred to as newstrade	Retail Sale	Clarity
2.	Relevant changes as above for Sale or Return.			
3.	Firm sale arrangements	-	New principle: 'The retailers' ability to vary supply must not be unduly restricted'	To ensure bona fide firm sales claimed
4.	Back issues	Back issues up to 12 months old can be claimed	You cannot claim back issue sales to the retailer	Clarity (now separated out from SOR)
5.	Treatment of firm sale copies	The initial supply will be the claimed sale [but there is a lack of clarity on treatment of copies given away free, sold at reduced price or using vouchers].	Proposed clarification: <ul style="list-style-type: none"> a) Copies sold to the retailer can be claimed as sales at the cover price unless there is evidence to the contrary, in which case claims should be adjusted as follows: <ul style="list-style-type: none"> i) The retailer distributes copies free to the consumer (these should be removed from claim) ii) The retailer sells copies at less than the Basic Cover Price (these may be claimed in the appropriate rate band). 	Clarity (now separated out from SOR)



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			<p>iii) The consumer makes part payment using a voucher from a publisher controlled promotion (these may be claimed in the appropriate rate band unless acceptance and redemption of vouchers is explicitly not allowed in the agreement between the publisher and the retailer in which case the voucher can be ignored),</p> <p>iv) The consumer makes full payment using a voucher from a publisher controlled promotion (these should be removed from the claim).</p> <p>For the avoidance of doubt: copies disposed of by the retailer (not sold to a consumer) do not need to be deducted.</p>	
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Single Copy Sales

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Relevant changes as above for Sale or Return.			

Single Copy Subscriptions

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Discounted subscriptions	Can have more than one BAR providing they relate to defined groups of subscribers (including renewals and DD payments)	Only have one BAR per country – anything below BAR is discounted (<i>except renewals and DD payments</i>)	Harmonisation
2.	Joint subscription packages	If publications are only available as packages the package rate and allocation must be registered with ABC and this will be applied for rate banding purposes.	<p>Clarification of method to address treatment of gifts and bundling:</p> <p>1. Where only 1 product is ABC claimed: the value (or perceived value) of gifts to the consumer have no effect in the price paid for ABC purposes)</p> <p>2. Where more than one product is ABC claimed: there is a</p>	<p>Clarity</p> <p>(Recognition of current treatment)</p>



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			hierarchy to determine treatment – see rule.	
3.	Third party purchasing subscriptions	<ul style="list-style-type: none"> • Where a third party has purchased more than one subscription on behalf of other individuals: <ul style="list-style-type: none"> – the rate paid per subscription must be at least 10% of the Basic Annual Rate (if the rate paid is less than this you may be able to claim these copies under multiple copy subscription sales) – The subscription must be a bona fide subscription purchase where: <ul style="list-style-type: none"> i) The arrangement relates to the purchase of the publication and is not linked to the provision of any advertising or promotion ii) The recipient(s) details are provided by or approved by the purchaser 	Subscriber must be recipient except: <ul style="list-style-type: none"> – Employers can purchase employee subscriptions – Subscriber can buy up to 12 gift subscriptions 	Harmonisation
4.	Distribution of copy	Copies must be individually wrapped and addressed	Copies must be distributed to a known addressee	Principle based approach – allowing for differing dist'n methods
5.	Distribution of copy	Addressed to a person by name or an organisation	Copies must be distributed to a known addressee	Not needed.
6.	Regularity of copy	Must be delivered on an every issue basis	Principle – for a contracted period.	Flexibility / harmonisation
7.	Payment	-	Principle of knowingly paid for added Specified may be purchased by cash or other means agreed by ABC in writing	Clarity To cover possibilities such as loyalty card schemes
8.	Subscription term	Must be for a fixed term	Removed	Covered by contracted period principle.
9.	Minimum	At least 3 issues/3 months (whichever the	Minimum 2 issues	Simplification/ha



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	subscription term	greater)		rmonisation
10.	Back issues	Back issues can only be claimed in the period in which the issue is reported	Back issues up to 12 months old can be claimed against the issue current at the time of sale'.	Harmonisation
11.	Distribution	Must be through third party	Removed as explicit requirement. Guidance added that will typically be through 3 rd party distributor	Flexibility
12.	Basic Annual Rate (BAR) - definition	Permanent 1 year rate, standard undiscounted, in contrast to special price limited period When BARs change, 1 month period of grace for copies sold at old BAR to be full rate	Standard 1 year rate for the publication, in contrast to a special price only available to a limited class, or under limited conditions Removed	Harmonisation Harmonisation
13.	Publication of BARs	Must publish in every issue or register with ABC	Just required to publish [i.e. publicly available, not necessarily in magazine). Removal of registration of rates with ABC.	Harmonisation
14.	Renewal and Direct Debit rates	Renewal and Direct Debit rates can be a defined Basic Annual Rate (meaning can be claimed at full rate)	May treat renewal and direct debit rates as full rate providing at least 90% of BAR is paid	Harmonisation
15.	2/3 year rates being treated as sold at BAR	80% for 2 year, 75% for 3 year	90% 2 year, 85% 3 year	Harmonisation
16.	Copies sold via a subscription agency	can be claimed as full rate based on assumption subscriber pays agency full rate	Can be assumed to be paid at full rate unless evidence to the contrary	Harmonisation
17.	Mailing list	Must include subs on audit issue mailing list	Must include subs on audit issue mailing list + be able to recreate any list on request	Audit
18.	Unpaid copies	Must report to ABC unpaid copies that remain unpaid > 3 months in UK and > 6 months overseas	Remove (covered by live, good and collectable rule)	Not necessary, covered at audit
19.	Merger of titles, buying ceased title lists	If buy list from ceased title, the first issue must be distributed within 6 months of last issue of ceased publication	Remove	Not necessary – subscriber has either opted in or been given chance to opt out.



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Paid and Controlled

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Relevant changes as above for Single Copy Subscriptions and Controlled circulation below			

Sponsored Subscription Sales

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	New category	-	New category for subscriptions to known addressees which have been requested by a third party subscriber (added due to changes in Single Copy Subscription requirements).	In harmonising single copy subscriptions copies purchased by a 3 rd party (except employer/employee and gift subs up to 12) cannot be included as single copy subscriptions.

Multiple Copy Subscription Sales

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Relevant changes as above for Single Copy Subscriptions			
2.	Recipients	The distribution method must suggest the	Must be likely copies are received by the same individual(s)	Harmonisation



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		copies are distributed to the same individual (or fixed pool of individuals) for the life of the subscription	over the term of the subscription	
3.	Back issues	Back issues can only be claimed in the period in which the issue is reported	You cannot claim back issues.	Harmonisation

Society/Association/Organisation Circulation

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Distribution of copy	Distributed individually addressed to current member of society	Distributed to individual who is a member of the society. Have removed a reference to paid up member of society as this is not an absolute requirement.	Principle based approach – allowing for differing dist'n methods. Clarity
2.	Corporate members	Individuals nominated by paid corporate members allowable	Change to <i>employees</i> under a corporate membership.	Clarity
3.	Society information	Must report number of society members and corporate members	Remove	Not circulation information
4.	Rates	Must publish or register a rate for paid society copies	Remove as requirement but add to guidance	Society paid copies are not reported by rate. This is an aid to audit only.
5.	Unpaid copies	Must report to ABC unpaid copies that remain unpaid > 3 months in UK and > 6 months overseas	Remove (covered by live, good and collectable rule)	Not necessary, covered at audit
6.	Analysis of requested society copies	Projected age of requests analysis for optional certificates	Remove	Not accurate, no demand

Controlled Circulation

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
	Requests by type	Analysed by individual and company requests in writing, by phone, electronic	Just individual and company requests – remove request method	Simplification
1.	Distribution of copy	Distributed individually wrapped and	Principle of distributed to individual. Each copy should be	Principle based



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		addressed	addressed or accompanied by instructions which enable the distributor to deliver to the individual.	approach – allowing for differing dist'n methods
2.	Terms of Control	Must not include prescribed words Qualifying demographic cannot be a geographic one alone.	Must not include words that are subjective or difficult to prove – the examples are moved to guidance Qualifying demographic cannot be geographic criteria <i>at a country level or higher</i> (to allow regional publications).	Principle based approach Harmonisation
3.	Requests	Request is valid for less than 3 years if this is stated	Remove	Unnecessary
4.	Requests	Requests received after date of distribution of audit issue cannot be claimed	Replaced with you must have evidence the individual has requested the publication within the last 3 years before you send it to them.	Clarity
5.	Requests	Individual requests must be by name and only 1 copy per request	Single copy per individual principle plus by name retained but duplication level will deal with any 'multiple instances of an individual.	Clarity
6.	Dual/multifunction requests	Requires separate signature/request question + delineated box + detail on font sizes etc	Removed detail – covered by requirement for clear request to receive the publication. Guidance includes examples of multi-requests.	Simplification
7.	Electronic requests	Action of clicking on a link not allowed as request	Rely on clear request has to be demonstrated	Principle based approach - flexibility
8.	Telephone requests	Various requirements about keeping files , invoices for campaigns etc	Moved to guidance	Principle based approach
9.	Telephone requests	We may insist telephone system is tested	Remove	Audit requirement
10.	Telephone requests – recording systems	We can approve systems that will avoid need for PIQs – advance written approval required	Remove requirement for approval in advance	Flexibility
11.	Non-requested source documentation	Documentation produced at audit must be original and there must be audit trail between mailing list and source	Remove	Audit judgement on source material. Audit trail requirement unnecessary as a list



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12.	Analysis of requested copies	Projected age of requests analysis for optional certificates	Remove	requirement. Not accurate, no demand
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Non-Controlled Circulation

	Subject	Current rule	Change to	Reason
1.	Distribution of copy	Distributed individually wrapped and addressed	Principle of distributed to individual. Each copy should be addressed or accompanied by instructions which enable the distributor to deliver to the individual.	Principle based approach – allowing for differing dist'n methods
2.	Distribution of copy	Only 1 copy per addressee	Single copy per issue principle. Duplications will deal with any 'instances of an individual receiving multiple copies.	Clarity
3.	Mailing list	Must include copies on audit issue mailing list	Must include copies on audit issue mailing list + be able to recreate any list on request	Audit
4.	Exhibition copies	-	Allow for hand distributed copies in guidance where individual signs to acknowledge receipt and provides relevant details	Flexibility/ Harmonisation

Digital Editions

	Subject	Current rule	Change to	Reason
1.	Supplements	Where all supplements accompanying print Parent Edition are not included this will be reported on the certificate	Remove	Specific requirements re editorial & advertising changes introduced since this rule written, not considered necessary
2.	Registration	Fundamental changes to Digital Edition must be notified to ABC	Remove	Not sure of purpose as mandated.
3.	Registration	ABC may contact any purchaser/addressee at any point for	Limited to free copies only	Matched to audit testing



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		further verification		
4.	Free copy email notification	Specifies precisely what system generated proof must be available	Requirement is that publisher must be able to demonstrate the emails sent and hard bouncebacks received – the other information has been moved to guidance as an example	Principle based approach
5.	Standards of Availability	Current rule prescribes how ABC will test whether a Digital Edition is published/ available and how it will retest and apply results	Removed	Audit testing does not need prescribing in this detail.
6.	Bundling treatment with print copy	If a digital edition is bundled with a print copy the price must be split equally for ABC purposes	Replaced with same bundling treatment as subscriptions for consistency (i.e. ignore non-ABC audited product, allocate price of ABC audited products by terms of offer or pro-rated or equally (if no means of pro-rating)	Consistency
7.	Publicity	Average circulation must be quoted alongside any digital edition figure, comparisons between paid and free must make clear distinction.	Removed	New publicity Byelaws cover clarity and transparency of this data.

Social Media - None.

Other Bulk Distribution

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Reporting	Analyse paid by rate band Full rate, 50-100%, <50%. If no BCP then use BAR, if no BAR then claim lowest rate	Propose remove paid rate bands - just 'paid' to harmonise with multiple copy sales having one rte band in other sectors	Common treatment with multiple copy sales in other sectors

Digital Licences - None.

Basic Cover Price

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Definition	-	The Basic Cover Price is the published cover price at which a single copy of the publication may be purchased without	Harmonisation



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			limitation and for an on-going duration, in contrast to a short term price or a special price only available to a limited class, or under limited conditions.	
2.	Failure to publish Cover Price	-	Treatment for failure to publish cover price added in line with other sectors – see rule	Common approach to all sectors
3.	Reporting Cover Price	You must report the cover price published on or within Audit Issue, will appear on certificate	You must report the cover price for UK and for ROI (if applicable) published on or within Audit Issue, will appear on certificate	Harmonisation

Geographical Analysis

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Geo analysis types	Analysis by UK County, region, ROI, Country, World region in various different options	Same geographical areas (albeit updated) but flexibility to report level of detail at publisher's option	Flexibility

Demographic Analysis

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Publicity	<ul style="list-style-type: none"> If you do publicise the registration of your publication for a Profile Certificate in advance of receiving the issued Profile Certificate, you are reminded that until the demographic data is certified you must not associate it with ABC and clearly source it as a publisher's statement Where you have chosen to publicise registration of your publication for a Profile Certificate, and it is not issued within 3 months of the end of the reporting period, we will publicise the non- issue, regardless of the reason. 	Removed	Covered by Byelaw publicity rules
2.	Optional additions and Deletions table	Prescribed definitions and how to calculate	Remove	No demand.

Editions

	Subject	Current rule	Change to	Reason
1.	Defining Main Edition	-	The Main Edition is defined as the UK and/or ROI version that has the largest circulation.	Harmonisation
2.	Definition	-	The branding and appearance of the edition must not give the impression that it is a different publication than the main edition. (note: a change of format alone will not infringe this requirement.	Clarity
3.	Definition	The edition is branded to the parent publication The front cover of the publication includes identification that it is an edition of the parent publication	Must carry a logotype/masthead incorporating the generic name of the main edition	Harmonisation
4.	Definition	Same cover date as parent edition either on every issue or occasional issue basis	Must carry the same cover date/issue identification as Main Edition Must be published and distributed on or about same date as main edition	Harmonisation
5.	Definition	There must not be a high level of duplication between editions	Removed	Harmonisation
6.	Change in editorial	If you have separate geographical/subject matter editions you can choose to break them out	Remove	Harmonisation
7.	Reporting	The front page of the certificate will identify that it is an editions certificate	Remove	Harmonisation
8.	Copies reproduced abroad under licence	Cannot claim copies reproduced abroad under licence unless there is proof all such copies carried all advertising	Removed	Other requirements cover changes sufficiently

Issues to be Included / Excluded

	Subject	Current rule	Change to	Reason
1.	Reporting excluded issues	Rules are silent on reporting of excluded issues	Clarify excluded issues will be reported on the certificate	Harmonisation



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2.	Distribution dates (for identifying which period an issue is reported in)	Rule specifies this is when copies enter the distribution chain	Definition broadened to cover all copies e.g. retail sales 1 st official on-sale date.	Clarity
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Reporting Periods

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Changes affecting reporting clarity	-	If in our opinion there are exceptional changes to a publication during the Reporting Period that mean issuing a Certificate for the mandatory Reporting Period in full might lead to confusion or a lack of transparency in the data certified, then we may agree or require the issue of more than one Certificate covering the mandatory period	Harmonisation
2.	Optional reporting periods	Single issue (must declare reason on certificate) Three month Six month Single issue and three month figure must be quoted with latest 6 or 12 month average.	Whole months or any number of whole months. Newly registered can report single issues until start of next month. Remove	Simplicity and flexibility Publicity rules cover clarity

Certificate Types

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Group Certificates	-	New optional Group Certificate: Requirements: - Each title certified under Business Magazine rules - Each certificate for same reporting period - no return submission, ABC compiles from constituent publication's returns	Harmonisation



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Return Form Submission and Certification

	<u>Subject</u>	<u>Current rule</u>	<u>Change to</u>	<u>Reason</u>
1.	Various	The section contains guidance re completing return forms & detail about auditors and audit work that is covered in the Byelaws, Letters of Engagement and Audit programmes	The section has therefore been honed down to the essentials of submitting data, the issue of certificates and audit/inspection.	Principle based approach.