



# REPORTING STANDARDS

## Business Magazines

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## INTRODUCTION

This document contains the Reporting Standards for print and digital copies of products registered in the Business Magazines sector.

The PDF versions of the Reporting Standards are issued at a certain point in time. As Reporting Standards are updated periodically, please check the website <https://www.abc.org.uk/reporting-standards> to ensure you are using the latest applicable standards and to access any available guidance notes.

Each category of circulation in the Reporting Standards has the following:

- Definition
- Principles
- Requirements
- Reporting

If you are after a quick understanding of the key points of any section then the definition and principles will provide an overview.

If you have any queries regarding how the Reporting Standards affect you or any specific queries please contact the ABC Client services team on 01442 870 800 or email [enquiries@abc.org.uk](mailto:enquiries@abc.org.uk).

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## GENERAL PRINCIPLES AND RECORD KEEPING

### INTRODUCTION

This section sets out some key requirements relating to the overall reporting and auditing of your ABC claim.

### PRINCIPLES

1. **Publication must be eligible to report under the Reporting Standards**
2. **Copies must comply with the Reporting Standards**
3. **Transactions related to the claim must be bona fide ‘arm’s length’ arrangements**
4. **Evidence to support the claim must be retained and available for a minimum period**
5. **There is a designated Audit Issue**

### REQUIREMENTS

1. **The publication must be eligible to report under the Reporting Standards**
  - a) You may apply to register a print or digital publication under the Business Magazine Reporting Standards.
2. **Copies must comply with the Reporting Standards**
  - a) Copies claimed must comply with the relevant sections of these Reporting Standards with the following exceptions which you specifically cannot claim:
    - i. Free copies to contributors
    - ii. Free copies to advertisers
    - iii. Free copies to advertising agencies. Note: You may claim controlled or non-controlled free circulation to advertising agencies providing the publication relates to the running of the agency business. *For example: an office equipment magazine.*
    - iv. Free copies to press cutting agencies
    - v. File or office copies
    - vi. Free publisher employee copies
    - vii. Paid publisher employee copies (unless they qualify under the Paid Employee Copies category or they are purchased as a normal consumer).
3. **Transactions related to the claim must be bona fide ‘arm’s length’ arrangements**
  - a) Transactions or arrangements (such as sales, circulation or distribution services) with your own organization or Related Parties will initially be deemed as not bona fide ‘arms-length’ for ABC purposes, meaning they cannot be included in your claim. However, they can be included if you are able to demonstrate to the satisfaction of your auditor or ABC that these comply with the Reporting Standards and are bona fide ‘arm’s length’ arrangements.
  - b) Related Parties for ABC purposes will include where:
    - i. One party has direct or indirect control of the other party; or
    - ii. The parties are subject to common control from the same source; or

- iii. One party has influence over the financial & operating policies of the other party to an extent that the other party might be inhibited from pursuing at all times its own separate interests; or
- iv. The parties, in entering a transaction, are subject to influence from the same source to such an extent that one of the parties to the transaction has subordinated its own separate interests.
- v. Transactions between contract publishers and their clients are deemed not to be arm's length in relation to a specific publication produced for that client.

This means the following are considered Related Parties for ABC purposes:

- The publisher, its subsidiary, parent and fellow undertakings (and Directors of these)
- Associates and Joint Ventures (and their investors)

**4. Evidence to support the claim must be retained and available for a minimum period**

- a) You must retain and be able to provide all records supporting the claim, including but not limited to:
  - i. An analysis of the claim by issue.
  - ii. Evidence supporting the number of copies printed for each issue claimed.
  - iii. Evidence supporting the number of copies distributed for each issue claimed, relevant to its circulation type.
  - iv. Evidence for each copy supporting the relevant circulation category and geographical region in which it is claimed on an issue by issue basis (i.e. not on a transactional basis).
  - v. A copy of each issue and any Editions claimed.
  - vi. Financial records.
- b) Records supporting the claim must be retained until we have completed the audit of the certificate for the subsequent corresponding Reporting Period. *For example, the records supporting the January to December 2021 period must be retained until we have completed the audit for January to December 2022.*
- c) Records supporting the claim must be retained and made available to us on request, in accordance with the ABC Byelaws.

**5. There is a designated Audit Issue**

- a) The Audit Issue is a designated issue in the Reporting Period for which the Reporting Standards specify certain information is required to be retained or reported. If there are exceptional circumstances affecting the use of the designated Audit Issue, please contact us for advice.
- b) The Audit Issue is by default the issue distributed nearest to the first day of the last month in the Reporting Period, which also falls within the Reporting Period.
  - i. You may opt to select as your publication's Audit Issue, the issue distributed either immediately prior or immediately after the default Audit Issue, providing the selected issue's distribution date falls within the last 3 months of the Reporting Period.

## REPORTED DATA

### INTRODUCTION

This section sets out other data and information that is reported on the ABC Certificate.

### REQUIREMENTS

#### 1. Type of Certificate

You may choose to report either a 'Standard' certificate of circulation or an 'International' certificate of circulation. You must report the Total Average Circulation and Audit Issue circulation as follows

##### a) Total Average Circulation

- i. 'Standard' certificate - analysed into UK and Other Countries, and by print and digital copies (as appropriate). You may opt to provide a more detailed geographical analysis if you wish - please refer to the Optional Reporting section.
- ii. 'International' certificate – analysed by print and digital copies (as appropriate). You must report a geographical analysis of the Audit Issue circulation.

##### b) Total Audit Issue Circulation

- i. 'Standard' certificate - analysed into UK and Other Countries, and by print and digital copies (as appropriate), by circulation type as shown in the table below.
- ii. 'International' certificate – analysed by print and digital copies (as appropriate) by circulation type as shown in the table below. You must also include as a minimum a geographical analysis of the Audit Issue circulation by World Region. You may opt to provide a more detailed analysis, such as by country.

Primary categories	Circulation categories eligible	Breakdown of copies	Additional analysis
Free Copies	Controlled Free  Other Free Free Requested Non-Controlled Free Free Pick Up	Requested (individual) Requested (colleague) Non-Requested (name) Non-Requested (job)	Age of requests Age of requests  Age of requests Free Pick Up by type if 20% or more of total circulation
Membership Copies	Membership Copies		Name of Society
Paid Single Copies	Retail Sales: Sale or return Firm Sale Single Copy Sales		
Paid Subscriptions	Single Copy Subscriptions All You Can Read Sales Multiple Subscriptions		

#### 2. Print and digital copies circulated to the same individual

- a) You may claim a print copy and a digital copy for an issue that are circulated to the same individual in the circulation analysis and total ABC circulation. This includes the following scenarios, where the individual is known and identifiable:

- i. A sale or subscription of both a print and digital copy to the same individual (whether as a single transaction – ‘a bundled/package sale’ or separate transactions)
  - ii. A free print copy and a paid digital copy to the same individual
  - iii. A paid print copy and a free digital copy to the same individual
  - iv. A free print copy and a free digital copy to the same individual
- b) If you include print and digital copies of an issue to the same individual in your claim, as noted in (a) above, you must report the average number of individuals that received both a print and digital copy per issue in the total average circulation for the period. This will appear as a note on the certificate and in ABC data.
- i. Where the details of the individual are not known because the circulation category’s requirements do not require it, then these copies do not need to be accounted for in the note. *Examples include retail sales, Free Pick Up or circulation where you use a bespoke distribution process that we have agreed to waive the requirement for the individuals’ details to be provided.*

### 3. Duplicate copies

- a) With the exception noted in point 2 above, you cannot claim duplicate copies to a known individual unless there is a category available to report them (for example Multiple Subscriptions). Note:
- i. A duplicate print copy or duplicate digital copy is defined as two or more occurrences of the same name, or company name (where the addressee is not identified by name or job title) or address unless it can be shown that the copies are distributed to different individuals.

### 4. Issue details, circulations and variances

- a) You must report for each issue in the Reporting Period the issue identifier. *For example, cover date, issue number*
- b) We will report the percentage variance of any issue’s total circulation from the average circulation, where this is greater than 10%.
- c) You must report additional issue circulation figures as follows:
- i. For publications publishing fewer than 18 issues in a calendar year, for each issue:
    - The issue’s identifier and its total circulation\*
    - The date of distribution
  - ii. For publications publishing 18 or more issues in a calendar year:
    - The number of issues distributed/made available in each month (determined as detailed in the section ‘Issues to be Included).
    - The average of the total circulations\* of those issues distributed in each month

\*Not including any adjustments for differences between estimated and actual retail sales for previous periods (means these breakdowns may not equate exactly to the total average circulation).

### 5. You may choose to report a Series Certificate

- a) You may choose to report a Certificate for a Series of Publications where:
- i. There is evidence that the publications form part of a series and that they are not ‘one-shots’ which require separate certification.
  - ii. Each publication is clearly identified as part of the series by the use of a common series logo or appropriate strapline on the front cover.

### 6. Optional Reporting

You may request to report additional analyses, derived from (or closely connected with) data reported on the certificate. Please see refer to the separate section ‘Optional Reporting’ for further details.

## FREE COPIES

### Controlled Free [Print/Digital]

#### DEFINITION

Copies sent free to a defined group of individuals.

#### PRINCIPLES

1. **Single copy per issue, distributed to an individual**
2. **Individual falls within defined criteria (Terms of Control)**
3. **Individual's details supported by identifiable and verifiable evidence that is less than five years old**
4. **Copies reported either as requested or non-requested**

#### REQUIREMENTS

1. **Single copy per issue, distributed to an individual**
  - a) You must be able to demonstrate the copy is distributed to the individual. For a digital copy:
    - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
    - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
  - b) You must retain a list of individual recipients for one designated issue each reporting period (the Audit Issue – see General Principles and Record Keeping section). In addition, you must be able to recreate a list of any issue in the reporting period on request. Note:
    - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
    - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
    - iii. We may agree to waive this requirement where you use a bespoke distribution process involving a new route to market that is operated by a third party or partner operation under the following conditions:
      - You are not able to provide a mailing list because the third party/partner operation responsible for the data will not/cannot provide it for the purposes of the audit.
      - You do not provide to the third party/partner operation details of specific individuals that should receive a copy of the publication under their process.
      - We are able to review the third party/partner's operation and distribution system and satisfy ourselves that the copies meet the definition and principles of Controlled Circulation and that there is not likely to be a significant level of duplication of a particular issue to individuals through this distribution process. [Note: individuals distributed to under this process need not be tested for duplications against copies distributed outside of the process].
      - You notify us that you are claiming copies that utilise these requirements in order that we can plan appropriate verification work.
  - c) You cannot claim distribution of back issues.

## 2. Individual falls within defined criteria (Terms of Control)

- a) The publisher sets the Terms of Control, complying with the following:
  - i. The wording must be clear and relate to individuals not companies
  - ii. Phrases or words that are subjective and/or difficult to explicitly prove are not permitted.
  - iii. There must be at least one qualifying demographic which is neither:
    - a geographic criteria at a country level or higher (*for example individuals in the UK*); or
    - an interest in the field (*for example individuals with an interest in technology*).
  - iv. It must be possible for individuals not to meet the criteria.
- b) You must not publish either the Terms of Control or an approximation of these in the publication or on any documents or promotional material targeted at the reader.

## 3. Individual's details supported by identifiable and verifiable evidence that is less than five years old

- a) At the date you distribute a copy you must have identifiable and verifiable evidence\* that:
  - i. supports the individual's name, job title/function (as appropriate) and address details.
  - ii. proves explicitly that the individual meets the Terms of Control.
  - iii. is less than five years old. Please refer to the guidance for dating evidence.

### \*Identifiable and verifiable

You must be able to **identify** (for any particular individual or information relevant to the claim) when and from where the information was obtained. *For example: The date plus whether it was obtained:*

- From a direct communication with the individual or a colleague (e.g. online form, event registration, telephone call); or
- From another organisation/operation, such as a Data Broker, Event Organiser or list specialist.

We must be able to **verify** to our satisfaction that the relevant information has been obtained either directly from the individual or from a colleague or other organisation/operation and can be relied upon in support of the claim. *This may require us to contact some individuals/colleagues and/or examine relevant records, such as campaign instructions, orders, invoices and/or payments as we consider appropriate.*

**Note: Transitional arrangements for June-reporting titles for the 6-month report for July 2025 to Dec 2025 only:** To mitigate the impact on the ageing of requests and sources by this change, those submitting this 6-month return may choose to calculate their ageing from the date of the previous June 2025 period Audit Issue. Further details [available here](#).

## 4. Copies reported either as requested or non-requested

The following additional requirements apply to copies claimed in these categories:

### Requested (individual)

- a) The copy must be addressed to the individual by name.
- b) You must have identifiable and verifiable evidence\* evidence that the individual has, within the last five years, made a clear request to receive the publication before you send it to them.
- c) The date of the request must be recorded so that it can be analysed by age.

### Requested (colleague)

- a) The copy must be addressed to the individual, either by name or job title/function.

b) At the date you distribute the copy you must have identifiable and verifiable evidence\* evidence that another employee or colleague from the individual's company or organisation has, within the last five years, made a clear request to receive the publication on the individual's behalf.

c) The date of the request must be recorded so that it can be analysed by age.

**Note: Transitional arrangements for June-reporting titles for the 6-month report for July 2025 to December 2025 only:** To mitigate the impact on the ageing of requests and sources by this change, those submitting this 6-month return may choose to calculate their ageing from the date of the previous June 2025 period Audit Issue. Further details [available here](#).

**Non-requested (either by name or by job title/function)**

a) The copy must be addressed to the individual, either by name or job title/function, depending on the circulation category in which it is claimed.

b) For by job title/function copies you may add a stylized/generic job title/job function to the address of an organisation for which you have identifiable and verifiable evidence\* of the organisation's name and address providing:

i. The job title/ job function could reasonably be expected to relate to an individual in that organisation.

ii. Multiple or similar job titles/ job functions at the same organisation are not used in a way that might result in copies being distributed to the same individual.

**\*Identifiable and verifiable**

You must be able to **identify** (for any particular individual or information relevant to the claim) when and from where the information was obtained. *For example: The date plus whether it was obtained:*

- From a direct communication with the individual or a colleague (e.g. online form, event registration, telephone call); or
- From another organisation/operation, such as a Data Broker, Event Organiser or list specialist.

We must be able to **verify** to our satisfaction that the relevant information has been obtained either directly from the individual or from a colleague or other organisation/operation and can be relied upon in support of the claim. *This may require us to contact some individuals/colleagues and/or examine relevant records, such as campaign instructions, orders, invoices and/or payments as we consider appropriate.*

**REPORTING**

You will report controlled circulation as follows, which will be broken out on the ABC Certificate:

1. By print and digital copies for the Audit Issue, by geographical type:

- a) United Kingdom
- b) Other Countries

2. By print and digital copies for the Audit Issue by circulation type:

- a) Requests (individual)
- b) Requests (colleague)
- c) Non-requested by name
- d) Non-requested by job

3. If your claim includes any controlled circulation copies you will report the applicable Terms of Control.

4. If you're claiming any controlled requested copies you will report an analysis of the age of the requested copies from the date of the distribution of the Audit Issue in the following bands:

- a) 0 - 1 year
- b) 1 - 2 years
- c) 2 - 3 years
- d) 3 - 4 years
- e) 4 - 5 years

**Note: Transitional arrangements for June-reporting titles for the 6-month report for July 2025 to December 2025 only:** To mitigate the impact on the ageing of requests and sources by this change, those submitting this 6-month return may choose to calculate their ageing from the date of the previous June 2025 period Audit Issue. Further details [available here](#).

## FREE COPIES

### Free Requested [Print/Digital]

#### DEFINITION

A single free copy requested by and distributed to a known individual.

#### PRINCIPLES

1. **Single copy per issue, distributed to a known individual**
2. **Individual has personally requested to receive the publication**

#### REQUIREMENTS

1. **Single copy per issue, distributed to a known individual**
  - a) You must be able to demonstrate the copy is distributed to the individual. For a digital copy:
    - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
    - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
  - b) You must retain a list of individual recipients for one designated issue each reporting period (the Audit Issue – see General Principles and Record Keeping section). In addition, you must be able to recreate a list of any issue in the reporting period on request. Note:
    - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
    - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
    - iii. We may agree to waive this requirement where you use a bespoke distribution process involving a new route to market that is operated by a third party or partner operation under the following conditions:
      - You are not able to provide a mailing list because the third party/partner operation responsible for the data will not/cannot provide it for the purposes of the audit.
      - You do not provide to the third party/partner operation details of specific individuals that should receive a copy of the publication under their process.
      - We are able to review the third party/partner's operation and distribution system and satisfy ourselves that the copies meet the definition and principles of Controlled Circulation and that there is not likely to be a significant level of duplication of a particular issue to individuals through this distribution process. [Note: individuals distributed to under this process need not be tested for duplications against copies distributed outside of the process].
      - You notify us that you are claiming copies that utilise these requirements in order that we can plan appropriate verification work.
  - c) You cannot claim distribution of back issues.
2. **Individual has personally requested to receive the publication**
  - a) You must have identifiable and verifiable evidence that the individual has, within the last five years, made a clear request to receive the publication before you send it to them.

**Note: Transitional arrangements for June-reporting titles for the 6-month report for July 2025 to Dec 2025 only:** To mitigate the impact on the ageing of requests and sources by this change, those submitting this 6-month return may choose to calculate their ageing from the date of the previous June 2025 period Audit Issue. Further details [available here](#).

## REPORTING

You will report free requested delivered copies as follows, which will be broken out on the ABC Certificate:

1. By print and digital copies for the Audit Issue by geographical type:
  - a) United Kingdom
  - b) Other Countries
2. Audit Issue analysis by the age of the requested copies from the date of the distribution of the Audit Issue in the following bands:
  - a) 0 - 1 year
  - b) 1 - 2 years
  - c) 2 - 3 years
  - d) 3 - 4 years
  - e) 4 - 5 years

**Note: Transitional arrangements for June-reporting titles for the 6-month report for July 2025 to December 2025 only:** To mitigate the impact on the ageing of requests and sources by this change, those submitting this 6-month return may choose to calculate their ageing from the date of the previous June 2025 period Audit Issue. Further details [available here](#).

## FREE COPIES

### Non-Controlled Free [Print/Digital]

#### DEFINITION

Single copies distributed to individuals or organisations.

#### PRINCIPLES

1. **Single copy per issue, distributed to an individual or organisation**

#### REQUIREMENTS

1. **Single copy per issue, distributed to an individual or organisation**

- a) You must be able to demonstrate the copy is distributed to the individual or organisation. For a digital copy:
  - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
  - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
- b) You must retain a list of the recipients for one designated issue each reporting period (the Audit Issue – see General Principles and Record Keeping section). In addition, you must be able to recreate a list of any issue in the reporting period on request. Note:
  - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
  - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
  - iii. We may agree to waive this requirement where you use a bespoke distribution process involving a new route to market that is operated by a third party or partner operation under the following conditions:
    - o You are not able to provide a mailing list because the third party/partner operation responsible for the data will not/cannot provide it for the purposes of the audit.
    - o You do not provide to the third party/partner operation details of specific individuals that should receive a copy of the publication under their process.
    - o We are able to review the third party/partner's operation and distribution system and satisfy ourselves that the copies meet the definition and principles of Controlled Circulation and that there is not likely to be a significant level of duplication of a particular issue to individuals through this distribution process. [Note: individuals distributed to under this process need not be tested for duplications against copies distributed outside of the process].
    - o You notify us that you are claiming copies that utilise these requirements in order that we can plan appropriate verification work.
- c) You cannot claim distribution of back issues.

#### REPORTING

You will report non-controlled free circulation as follows, which will be broken out on the ABC Certificate:

1. By print and digital copies for the Audit Issue by geographical type:

- a) United Kingdom
- b) Other Countries

## FREE COPIES

### Free Pick Up [Print only]

#### DEFINITION

Copies distributed to known distribution points for pick up or receipt by consumers.

#### PRINCIPLES

1. **Prior notification of distribution details to ABC**
2. **Copies are distributed to known distribution points and made available at the known distribution points for pick up or receipt by consumers**
3. **Quantity claimed should not exceed potential demand by the intended consumers**
4. **Effective management controls over distribution**

#### REQUIREMENTS

1. **Prior notification of distribution details to ABC**
  - a) You must inform ABC before the distribution of the first issue for which you intend to claim Free Pick Up, including the following information:
    - i. Details of how, when and where the copies will be distributed
    - ii. A list of all distribution points
  - b) You must, on an on-going basis, be able to provide ABC, on request, details of current and historical distribution points, quantities and distribution dates.
2. **Copies are distributed to known distribution points and made available for pick up or receipt by consumers**
  - a) A distribution point is defined as an agreed location at which copies are handed to or left for pick up by the consumer.
    - i. The distribution points claimed must be consistent with the overview description.
    - ii. ABC must have the right to visit or contact distribution points for verification purposes.
  - b) You must be able to provide evidence, from the third party responsible, of the number of copies of the publication made available for pick up or receipt at each distribution point by consumers. Note:
    - i. Where the copies are made available for pick up or receipt at distribution points by drivers/distributors that are not 3rd party to the publisher (such as in-house distributors or from a joint venture), it may be possible to include these in the claim as long as:
      - It can be demonstrated that the drivers/distributors have sufficient independence and are specifically contracted to deliver/distribute the publication.
      - The auditor/ABC has full and unrestricted access to the relevant parties' documentation and financial records.
      - ABC has specifically agreed this distribution method.
    - ii. In the case of retail customer magazines, it may be acceptable for the publication to be distributed through the same distribution system from central/area warehouse to individual retail outlets as the retailer's other goods and use associated documentation to support a gross distribution claim and EPOS reports for net distribution if applicable . A retail customer magazine is defined as a publication which:

- Is published by or on behalf of a retailer
  - Is targeted at customers of that retailer
  - Is supplied to the retailer's own outlets for distribution in store
- iii. In the case of copies distributed to third party distributors for onward distribution to airlines (for airplanes and/or lounges), trains or ships:
- Copies may be claimed as gross distribution providing ABC is given full and free access to the distributor's contractual arrangements, invoices and documentation to enable verification of the onward supply.
  - The gross distribution claim must be restricted to the quantity verified as onwardly distributed to the airlines, trains or ships and not the quantity supplied to the distributor.
- c) Where your Free Pick Up claim is for the net number of copies picked up or received by consumers at a distribution point, you must be able to provide evidence of the number of copies returned/not picked up at each relevant distribution point. *Note: This must be on a 'session' basis. For example, a hand merchandiser who goes out first thing in the morning and then again after lunch with a new supply of copies must sign separately for the morning and afternoon supply and returns.*
- d) You cannot claim distribution of back issues, with the exception of copies distributed at events, which can be claimed for issues up to 6 months from the back issue's distribution date. *For example: May issue distributed on 1st May can be distributed at a show up until 31st October.*

### 3. Quantity claimed should not exceed potential demand by the intended consumers

- a) Your Free Pick Up claim must be reported, as a minimum, as follows:
- i. **Daily publications (except copies distributed airside, on trains or ships):** On a net basis (i.e. those made available less copies not picked up by consumers).
  - ii. **Non-daily publications and copies distributed airside, on trains or ships:** On a gross (i.e. supply) basis.
  - iii. In the case of copies distributed to third party distributors for onward distribution to airlines (for airplanes and/or lounges) and trains or ships:
    - o Copies may be claimed as gross distribution providing ABC is given full and free access to the distributor's contractual arrangements, invoices and documentation to enable verification of the onward supply.
    - o The gross distribution claim must be restricted to the quantity verified as onwardly distributed to the airlines, trains or ships and not the quantity supplied to the distributor.
- b) As an option you can report copies distributed in a public place (either by hand merchandiser or via distribution bins) on a net basis as long as:
- i. There are 1 or more distinct Distribution Cycles, each cycle being completed within 24 hours.
  - ii. For each distinct Distribution Cycle, you have third party evidence of the net distribution (i.e. those made available and actually collected/handed out).

### 5. Effective management controls over distribution

- a) The publisher is responsible for ensuring that the copies they claim have been delivered and if applicable returns/copies not picked up are accounted for. This requires a publisher to have appropriate management controls and processes in place to ensure that this is happening.

## REPORTING

You will report Free Pick Up as follows, which will be broken out on the ABC Certificate:

1. By print copies for the Audit Issue by geographical type:
  - a) United Kingdom

b) Other Countries

2. If your publication's total Audit Issue Free Pick Up Copies represents 20% or more of the total Audit Issue circulation, you must analyse the quantity by distribution point type.
3. A verifiable overview description of the Free Pick Up claim.

## MEMBERSHIP COPIES [Print/Digital]

### DEFINITION

A single copy of an official Society publication distributed to a member of that society.

*Note: 'Society' throughout this section refers to the Society, Association or Organisation as appropriate.*

### PRINCIPLES

1. **The publication is an official publication of the Society**
2. **Single copy of an issue distributed to an individual who is a member of the Society (or an employee nominated under a corporate society membership)**

### REQUIREMENTS

1. **The publication is an official publication of the society**
  - a) You must be able to provide evidence that the publication is:
    - i. An official publication of the Society; or
    - ii. Circulated as a member benefit of the Society
2. **Single copy of an issue distributed to an individual who is a member of the Society (or an employee nominated under a corporate society membership)**
  - a) Corporate members are members of the Society (companies or organisations) who pay the membership fee or fees and nominate employees as recipients of the publication. These recipients may be claimed as Society circulation.
  - b) Evidence of the individual's Society membership (or organisation's corporate membership and nominated employees) must be available.
  - c) **You must be able to demonstrate the copy is distributed to the individual.** For a digital copy:
    - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
    - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
  - d) You must retain a list of individual recipients for one designated issue each reporting period (the Audit Issue – see General Principles and Record Keeping section). In addition, you must be able to recreate a list for any issue in the reporting period on request. Note:
    - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
    - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
  - e) You cannot claim distribution of back issues.

### REPORTING

1. You will report Membership Copies as follows, which will be broken out on the ABC Certificate:
  - a) By print and digital copies for the Audit Issue by geographical type:
    - i. United Kingdom
    - ii. Other Countries
2. The Society/Societies name(s) will also be reported on the ABC Certificate, identifying whether the publication is an official publication and/or is circulated as a member benefit of the Society.

## PAID SINGLE COPIES

### Retail Sales (Sale or Return) [Print/Digital]

#### DEFINITION

A copy sold to a retailer, on a sale or return basis, for resale as a single copy to a consumer.

#### PRINCIPLES

1. **Single copy knowingly paid for by the consumer to the retailer**
2. **Copies are purchased from the publisher by the retailer, on a sale or return basis, either direct or via the distribution chain (typically distributor and/or wholesaler)**
3. **It must be clear that the price paid by the consumer includes the publication**
4. **There must be an incentive for unsold copies/net sale to be reported to the publisher**
5. **If the final net sale is not known then estimates must be made**

#### REQUIREMENTS

1. **Single copy knowingly paid for by the consumer to the retailer**
  - a) The purchase by the consumer may be in cash or by other means agreed by ABC in writing.
  - b) Back issues up to 12 months old can be claimed against the issue current at the time of sale.
  - c) Sales by retailers will be treated as sales at the cover price unless there is evidence to the contrary.
2. **Copies are purchased from the publisher by the retailer, on a sale or return basis, either direct or via the distribution chain (typically distributor and/or wholesaler)**
  - a) 'Sale or Return' means unsold copies are returned or reported for credit. The copies claimed will therefore be the net sale (copies supplied less credited copies). Note:
    - i. Copies reported using a pay on scan system will be reported in this category. You will need to ensure appropriate records of sales are available for audit.
    - ii. 'Limited Sale or Return' means unsold copies are returned or reported for credit up to a limit contractually agreed with the retailer. The copies claimed will therefore be the net sale (copies supplied less credited copies).
  - b) Where the publisher is not third party to the retailer then evidence of purchase by the consumer is required. *For example, EPOS reports and retailer revenues.*
  - c) You must account for net sales on an issue by issue basis.
3. **It must be clear that the price paid by the consumer includes the publication**
  - a) If a voucher from a publisher-controlled promotion is used the amount paid by the consumer is deemed to be the total of the cash paid to the retailer and any cash they paid for the voucher.
  - b) You can ignore the value (or perceived value) of any gifts, or other incentives. However:
    - i. Cash reimbursements to the consumer must be taken into account.
    - ii. If the publication is promoted to the consumer as free, then it cannot be claimed as a paid sale.

**4. There must be an incentive for unsold copies/net sale to be reported to the publisher**

No additional requirements

**5. If the final net sale is not known then estimates must be made**

a) If at the time you submit your circulation claim unsold copies could still be returned or reported:

- i. You must make an estimate of final sales.
- ii. You must adjust your claim in the following period to reflect any difference between the estimated net sale and the actual net sale.

b) In relation to promotional schemes utilising voucher redemption: If you are reporting on a monthly basis and the effect of not making an estimate is judged to be unlikely to affect the figures claimed by more than 2% of the total average circulation then you can account for the vouchers on a wash through basis (i.e. as they are redeemed).

## REPORTING

You will report retail sales as follows, which will be broken out on the ABC Certificate :

1. By print and digital copies, total retail sales (combined with single copy sales) for the Audit Issue by geographical type:
  - a) United Kingdom
  - b) Other Countries

## PAID SINGLE COPIES

### Retail Sales (Firm Sale) [Print/Digital]

#### DEFINITION

A copy sold to a retailer, on a firm sale basis, intended for resale as a single copy to a consumer.

#### PRINCIPLES

1. **Single copy made available for purchase by the consumer from the retailer**
2. **Copies are purchased from the publisher by the retailer, on a firm sale basis, either direct or via the distribution chain (typically distributor and/or wholesaler)**
3. **It must be clear that the price paid by the consumer includes the publication**
4. **The retailers' ability to vary supply must not be unduly restricted**

#### REQUIREMENTS

1. **Single copy made available for purchase by the consumer from the retailer**
  - a) Contractual arrangement with the retailer must make clear that copies are for resale to the consumer.
  - b) The purchase by the consumer may be in cash or by other means agreed by ABC in writing.
  - c) You cannot claim back issue sales to the retailer.
2. **Copies are purchased from the publisher by the retailer, on a firm sale basis, either direct or via the distribution chain (typically distributor and/or wholesaler)**
  - a) 'Firm sale' means that unsold copies are not returned or reported for credit.
  - b) You must account for sales on an issue by issue basis.
3. **It must be clear that the price paid by the consumer includes the publication**
  - a) If a voucher from a publisher-controlled promotion is used the amount paid by the consumer is deemed to be the total of the cash paid to the retailer and any cash they paid for the voucher.
  - b) You can ignore the value (or perceived value) of any gifts, or other incentives. However:
    - i. Cash reimbursements to the consumer must be taken into account.
  - c) You must retain details of promotional or special offers during the reporting period.
  - d) Copies sold to the retailer can be claimed as retail sales unless there is evidence to the contrary, in which case claims should be adjusted as follows:
    - i. The retailer distributes copies free to the consumer (these should be removed from claim)
    - ii. The consumer makes full payment using a voucher from a publisher-controlled promotion (these should be removed from the claim).

For the avoidance of doubt: copies disposed of by the retailer (not sold to a consumer) do not need to be deducted.
4. **The retailers' ability to vary supply must not be unduly restricted**

No additional requirements.

## REPORTING

You will report the following, which will be broken out on the ABC Certificate:

1. By print and digital copies, total retail sales (combined with single copy sales) for the Audit Issue by geographical type:
  - i. United Kingdom
  - ii. Other Countries

## PAID SINGLE COPIES

### Single Copy Sales [Print/Digital]

#### DEFINITION

A single copy sold to a consumer direct by the publisher.

#### PRINCIPLES

1. **Single copy knowingly paid for by the consumer**
2. **Copies are purchased direct from the publisher**
3. **It must be clear that the price paid by the consumer includes the publication**

#### REQUIREMENTS

1. **Single copy knowingly paid for by the consumer**
  - a) The purchase by the consumer may be in cash or by other means agreed by ABC in writing.
  - b) Back issues up to 12 months old can be claimed against the issue current at the time of sale.
2. **Copies are purchased direct from the publisher**
  - a) You must account for sales on an issue by issue basis.
3. **It must be clear that the price paid by the consumer includes the publication**
  - a) If a voucher from a publisher-controlled promotion is used the amount paid by the consumer is deemed to be the total of the cash paid to the publisher and any cash they paid for the voucher.
  - b) You can ignore the value (or perceived value) of any gifts, or other incentives. However:
    - i. Cash reimbursements to the consumer must be taken into account.
  - c) You must retain details of promotional or special offers during the reporting period.

#### REPORTING

You will report the following, which will be broken out on the ABC Certificate:

1. By print and digital copies, total single copy sales (combined with retail sales) for the Audit Issue by geographical type:
  - a) United Kingdom
  - b) Other Countries.

## PAID SUBSCRIPTIONS

### Single Copy Subscription Sales [Print/Digital]

#### DEFINITION

A single copy sold and distributed to an individual or organisation for a contracted period.

#### PRINCIPLES

1. **There must be a contractual arrangement between the subscriber and the publisher (or their agent)**
2. **Single copy per issue, distributed to a known addressee**
3. **Single copy knowingly paid for by the subscriber**
4. **For a contracted period and for a minimum number of issues (at least two)**
5. **It must be clear that the price paid by the consumer includes the publication**

#### REQUIREMENTS

1. **There must be a contractual arrangement between the subscriber and the publisher (or their agent)**
  - a) You must be able to provide evidence of the contractual arrangements between the subscriber and the publisher (or their agent) including the issues/period and the price.
  - b) If you merge publications or purchase a subscription list from a ceased publication it must be clear that subscribers have made a choice to receive the publication claimed.
2. **Single copy per issue, distributed to a known addressee**
  - a) You must be able to demonstrate the copy is distributed to the addressee.
  - b) You must retain a list of individual recipients for one designated issue each reporting period (the Audit Issue - see General Principles and Record Keeping section). In addition, you must be able to recreate a list for any issue in the reporting period on request. Note:
    - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
    - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
3. **Single copy knowingly paid for by the subscriber**
  - a) The subscriber must be the addressee except:
    - i. Where the addressee is an employee whose employer is the subscriber.
    - ii. Where the addressee is the recipient of a gift subscription from the subscriber (maximum 12 gift subscriptions per subscriber). The recipient's geographical location for reporting purposes may be treated as being the same as that of the purchaser making the gift.
  - b) The purchase by the subscriber may be in cash or by other means agreed by ABC in writing.

- c) You can claim copies where payment is outstanding as long as there are reasonable grounds to consider them to be live, good and collectable.

**4. For a contracted period and for a minimum number of issues (at least two)**

- a) You can claim back issues up to 12 months old against the issue current at the time of sale, supplied as part of a subscription agreement.

**5. It must be clear that the price paid by the consumer includes the publication**

- a) You can ignore the value (or perceived value) of any gifts, or other incentives. However:
  - i. Cash reimbursements to the consumer must be taken into account.
  - ii. If the publication is promoted to the consumer as free, then it cannot be claimed as a paid sale.
- b) You must retain details of promotional or special offers during the reporting period.

## REPORTING

You will report the following, which will be shown on the ABC Certificate:

- 1. By print and digital copies for the Audit Issue by geographical type:
  - a) United Kingdom
  - b) Other Countries

## PAID SUBSCRIPTIONS

### All You Can Read Sales [Digital only]

#### DEFINITION

A Digital Copy that a consumer has purchased and viewed as part of a multi-publication package.

#### PRINCIPLES

1. **Copy is paid for and viewed by the consumer**
2. **There must be a contractual arrangement between any third-party intermediaries/sellers and the publisher to purchase the copies**
3. **If the final paid for and viewed figure is not known then estimates can be made**

#### REQUIREMENTS

1. **Copy is paid for and viewed by the consumer**
  - a) The consumer has paid for the right to view the copy as part of a multi-publication package. *Note: Although the consumer may subscribe to the multi-publication package for a contracted period, the copies are not treated as subscriptions but claimed on a single-issue basis when viewed.*
  - b) Copies can only be claimed if they have been viewed by a consumer. This will be demonstrated by meeting at least the definition of a Publication Active View (a single copy of a publication actively opened by a device for viewing. See full definition below)
  - c) Only one view per device per issue can be claimed
  - d) There is no requirement to de-duplicate it against other circulation categories
  - e) Back issues up to 12 months old can be claimed against the issue current at the time it is viewed

#### Publication Active View:

1. Definition: A single copy of a publication actively opened by a device for viewing.
2. Principles:
  - a. A minimum of one page of an issue opened/served on/to a device.
  - b. Distinct action/event by the end user to view.  
*Note: 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.*
  - c. The view request must be on an issue by issue basis.

*Note: A device may make a number of active views of an issue, either together or at different times. Only one active view per device per issue can be claimed and reported*

2. **There must be a contractual arrangement between any third-party intermediaries/sellers and the publisher to purchase the copies**
  - a) Where third-parties are used you must be able to provide:

- i. Evidence of payment to the publisher and between any other intermediaries for the copies claimed
- ii. Evidence of the contractual arrangements between the publisher and any other intermediaries to measure, report and pay the publisher for the copies claimed.

**3. If the final paid for and viewed figure is not known then estimates can be made**

- a) If at the time you submit your circulation claim you have good reason to believe further copies will be paid for and viewed (for example based on historical trends) then you may make an estimate of final sales.
- b) You must adjust your claim in the following period to reflect any difference between the estimated claim and the actual figure.

## **REPORTING**

You will report All You Can Read Sales as follows, which will be broken out on the ABC Certificate:

1. By digital copies for the Audit Issue by geographical type:
  - a) United Kingdom
  - b) Other Countries

## PAID SUBSCRIPTIONS

### Multiple Copy Subscription Sales [Print/Digital]

#### DEFINITION

More than one copy purchased by a known subscriber for a contracted period with the intention to distribute to the same group of individuals over the term of the subscription.

#### PRINCIPLES

1. **There must be a contractual arrangement between the subscriber and the publisher (or their agent)**
2. **Must be likely copies are received by the same individual(s) over the term of the subscription**
3. **Copies are paid for by the subscriber**
4. **For a contracted period and for a minimum number of issues (at least two)**

#### REQUIREMENTS

1. **There must be a contractual arrangement between the subscriber and the publisher (or their agent)**
  - a) You must be able to provide evidence of the contractual arrangements between the subscriber and the publisher (or their agent) including the issues/period, the quantities to be supplied and the price.
2. **Must be likely copies are received by the same individual(s) over the term of the subscription**
  - a) You must be able to demonstrate, through the distribution method, that the copies are likely to be distributed to the same individual(s) over the subscription term. For a digital copy you must be able to demonstrate that the copy is delivered or made available for the recipient to access.
3. **Copies are paid for by the subscriber**
  - a) You can claim copies where payment is outstanding as long as there are reasonable grounds to consider them to be live, good and collectable.
4. **For a contracted period and for a minimum number of issues (at least two)**
  - a) You cannot claim distribution of back issues.

#### REPORTING

You will report Multiple Copy Subscription Sales as follows, which will be broken out on the ABC Certificate:

1. By print and digital copies for the Audit Issue by geographical type:
  - a) United Kingdom
  - b) Other Countries

## EDITIONS

### DEFINITION

An Edition is a version of an issue of the publication that varies from the Main Edition (the UK and/or ROI version that has the largest circulation), usually for reasons of geography, timing or content. How it has varied from the Main Edition will affect how or whether it can be included on the same ABC Certificate.

### PRINCIPLES

1. An Edition must be in keeping with the overall issue to be reported on the same ABC Certificate
2. Changes to an Edition may require a breakout on the ABC Certificate

### REQUIREMENTS

1. An Edition must be in keeping with the overall issue to be reported on the same ABC Certificate
  - a) The Edition must carry a logotype/masthead incorporating the generic name of the Main Edition.
  - b) The branding and appearance of the Edition must be sufficiently similar to be considered the same product as the Main Edition. For the avoidance of doubt a change in format alone (such as a change in publication size) will not infringe this requirement.
  - c) The Edition must carry the same cover date/issue identification as the Main Edition.
  - d) The Edition must be published and distributed on or about the same date as the Main Edition.
  - e) Additionally, digital copies:
    - i. Must be published electronically as a unit (*For the avoidance of doubt, a website cannot be reported as an edition of the publication*).
    - ii. May be reformatted to suit the different delivery medium. *For example: changes in page size or order.*
    - iii. May include may include electronic enhancements to editorial or advertising to take advantage of the medium. *For example: pictures replaced with video, include live social media or news feeds.*

You are requested to register your intention to claim digital copies in advance of your first claim, as we may carry out audit work during the reporting period.

- f) There can be up to 100% change in advertising (including classified) from the Main Edition.
2. Changes to an Edition may require a breakout on the ABC Certificate
    - a) Where there are any advertising changes, you must report the average and Audit Issue total circulations for that Edition, which will appear on the Certificate.
    - b) Advertising changes are ignored for ABC purposes if:
      - i. They are made solely because their inclusion would, in the opinion of the publisher, the advertiser or their agency render the publication illegal in a particular territory. Note: This opinion must be judged reasonable by the auditor and ABC.
      - ii. The advertisement has changed but it is the same advertiser.
    - c) If you do need to breakout an Edition then the Main Edition will be broken out as well.

## ISSUES TO BE INCLUDED/EXCLUDED

### DEFINITION

All published issues for which the majority of the distribution took place within the Reporting Period must be included except for any issues allowed to be excluded according to this section.

### PRINCIPLES

1. **All issues published in the Reporting Period must be included**
2. **Published issues that are allowed to be excluded according to this section may be removed from the average circulation figure**
3. **Issues allowed to be excluded from the average circulation figure will be reported**

### REQUIREMENTS

1. **All issues published in the Reporting Period must be included**
  - a) Whether an issue is included in the Reporting Period is determined by the date by which 50% of the claimed distribution is distributed/made available. For each component of distribution, the date distributed/made available is determined as follows:
    - i. Mailed copies: The date the copies enter the distribution chain, i.e. when they are posted or delivered to a courier.
    - ii. Paid copies: The first date the copies are made available to the consumer, i.e. for retail sales the first official on sale date.
    - iii. Copies made available for pick up by consumer: The date the copies are made available/handed out to the consumer.
    - iv. Free Digital Copies: The date email notifications are sent.
2. **Published issues that are allowed to be excluded according to this section may be removed from the average circulation**
  - a) There are certain circumstances under which you may exclude an issue from the reported circulation. The circumstances and information surrounding any exclusion are subject to audit.
  - b) **ABC granted exclusion:** You may exclude an issue for which we have issued an exclusion note. You can apply for an ABC granted exclusion if:
    - i. Due to circumstances outside your control the achieved auditable distribution of an issue is less than planned, resulting in a reduction in the publication's average circulation greater than 0.5%.
    - ii. You submit your application to us before you submit your circulation Return, including details of the issue concerned, its distribution date, the planned and achieved distribution and the reason for the shortfall.

If we do not issue an exclusion note we will issue a rejection notice detailing the reason for rejection
3. **Issues allowed to be excluded from the average circulation figure will be reported**
  - a) Any issues excluded from the reported circulation will be reported on the Certificate.

### REPORTING

You will report the following which will be reported on the ABC Certificate:

1. Number of issues included in the circulation claim.
2. Details of any issues excluded from the circulation claim, including for each:
  - a) The general reason for exclusion.
  - b) The total net circulation.

## REPORTING PERIODS

### DEFINITION

Each ABC Certificate has a defined Reporting Period which identifies the date or dates it covers.

### PRINCIPLES

- 1. You must report a continuous series of Reporting Periods on a mandatory frequency**
- 2. You can report optional shorter Reporting Periods**

### REQUIREMENTS

- 1. You must report a continuous series of Reporting Periods on a mandatory frequency**
  - a) Once we have issued a publication's first ABC Certificate for a mandatory reporting period we must continue to issue Certificates for subsequent consecutive mandatory Reporting Periods (i.e. so there is no gap in certification) while the publication remains registered.
  - b) The mandatory Reporting Period is:
    - i. 12 months, 1<sup>st</sup> January to 31<sup>st</sup> December
      - Note: To transition to December reporting, those titles currently on a June annual cycle will:
        - Report as normal their July 24 to June 25 period, to existing standards
        - Issue an additional 6-month certificate for the period July to December 2025, with no additional fee from ABC
        - Then report January to December 2026, continuing on a December cycle thereafter.
    - ii. For annual publications (1 issue per year) the distribution period (the entire date range over which the claimed copies have been distributed) or a single principal distribution date (the date by which more than 50% of the claimed distribution has occurred).
  - c) 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. *For example, if a publication changes from a paid circulation model to free circulation during the period then one Certificate could be issued up until the point of change and one from that point to the end of the mandatory Reporting Period.*
- 2. You can report optional shorter Reporting Periods**
  - a) Optional Reporting Periods are whole months or any number of whole months in addition to mandatory Reporting Periods. Note: A month is a calendar month.
    - i. You can report an optional single issue with the condition that you must then also report to the next 6-month mandatory period end (i.e. to 30<sup>th</sup> June or to 31<sup>st</sup> December).
  - b) For newly registered publications only:
    - i. You can report single issues until the start of the next month.
    - ii. You can report one or more consecutive optional Reporting Periods (i.e. there is no gap in certification) before reporting your first mandatory Reporting Period.

## OPTIONAL REPORTING

### INTRODUCTON

You may request to report additional information via ABC to enhance the promotion or messaging relevant to your publication or your wider brand.

Information or data related to publication may be reported on the publication's ABC certificate. Information or data related to the wider brand or group may be reported via a Brand or Group Report (please see separate Reporting Standards for these).

Please contact us to discuss the details of the additional data you wish to report, including how the claim may be submitted and associated additional audit costs.

### REQUIREMENTS

Information or data you may opt to report on your publication's certificate, includes:

- a) Analyses derived from (or closely connected with) data reported on the certificate. This will be subject to the data being, in our opinion:
  - i. Auditable
  - ii. Clear (terms defined or explained as appropriate)
  - iii. Related to the product being certified
  - iv. Albeit reporting different information, is in keeping with the requirements for data and evidence in relation to the current Reporting Standards. *For example: if the breakout is an analysis of subscription bundles, we would expect the evidence levels to be in line with that already in place for subscriptions.*
- b) Geographical Analysis - please refer to separate section.
- c) Demographic Analysis – please refer to separate section.
- d) Digital Licences – please refer to separate section.
- e) Publication Active Views (PAVs) - please refer to separate section.

## GEOGRAPHICAL ANALYSIS - Optional

### DEFINITION

The Geographical Analysis is an optional breakout of the circulation into geographical locations (mandatory if you have chosen an International certificate type).

### PRINCIPLES

1. Publishers may optionally report a Geographical Analysis
2. The circulation is analysed into standardised geographical locations

### REQUIREMENTS

1. Publishers may optionally report a Geographical Analysis
  - a) You may report a Geographical Analysis as an optional table on the Standard Certificate. (Note: It is mandatory if you have chosen an International certificate type).
  - b) You may report a bespoke analysis that is relevant to your publication (subject to the conditions set out in the Optional Reporting section) or use our templated versions as set out below.
2. The circulation is analysed into standardised geographical locations
  - a) The Geographical Analysis is a census of the analysed data (i.e. not sample based and no extrapolation).
  - b) You may select the level of detail to which you analyse copies, with the ability to mix different levels from the following:
    - i. World Region. *For example: Europe, North America, Asia*
    - ii. Country. *For example: United Kingdom, Ireland, Germany*
    - iii. UK Region. *For example: East Anglia, East Midlands*
    - iv. UK Counties. *For example: Cambridgeshire, Dorset*
  - c) You may analyse copies as 'Other', which will have a distinct definition (i.e. 'none of the above'), and which you must be able to prove the categorisation. *For example: United Kingdom 3,879 broken out into London 3,100 and Other 779 (being UK but not London).*
  - d) If you cannot prove a copy's categorisation or choose not to analyse it in a geographical category then it will be reported as 'Not analysed'.

### REPORTING

You will report the Geographical Analysis as follows, which will be broken out on the ABC Certificate:

1. As an analysis of the Audit Issue circulation.
2. Your own bespoke analysis as described above.

## DEMOGRAPHIC ANALYSIS - Optional

### DEFINITION

You can choose to report demographic information about your circulation on your ABC certificate.

### PRINCIPLES

1. **There are different types of demographic analyses**
2. **Demographic details must be supported by identifiable and verifiable evidence that is less than five years old**

### REQUIREMENTS

1. **There are different types of demographic analyses**
  - a) You may report a Demographic Analysis as an optional table on the Certificate.
  - b) You may report a bespoke analysis that is relevant to your publication (subject to the conditions set out in the Optional Reporting section) or use our templated criteria as set out below. This section contains a number of general principles that will guide you as to what may be acceptable for certification.
  - c) Each demographic analysis is a census of the analysed data for the Audit Issue (i.e. not sample based or extrapolated).
  - d) If you cannot or choose not to report data for a copy, it will be identified as not analysed. Note: Non-controlled free circulation must be reported as not analysed for any demographic except the geographical analysis.
  - e) Analysis tables will be one of the following types:
    - i. Single Response Table: There is only one response included for each analysed copy.
    - ii. Multiple Response Table:
      - There may be more than one response included for each analysed copy, unless data is re-grouped when only one response per individual can be counted within a regrouped category.
      - We will add a footnote indicating there are multiple responses for each copy and add the percentage of the Audit Issue total circulation that is analysed.
      - We may require additional explanatory notes if deemed necessary for clarity.
    - iii. Cross Analysis Table:
      - One demographic is cross referenced against another. *For example: Job Title against Number of Employees.*
      - We will add a footnote indicating the number of copies analysed and add the percentage of the Audit Issue total circulation that is analysed.
      - We may require additional explanatory notes if deemed necessary for clarity.
  - f) Any descriptions of grouped data must be representative of the data grouped and not lead to ambiguity about the category in which a demographic could be claimed. *For example, having Sales Managers and, IT Managers may be grouped together under one heading 'Managers' (assuming no other Managers).*
  - g) Analysis by job title (if claimed): Where more than one type of a particular job title appears on a demographic table, any generic use of that title must be preceded with the word 'other'. *For example: Sales Managers 1,400, Technical Managers 3,200, Other Managers 2,200.*
  - h) Analysis by site (if claimed): Site analysis demonstrates the number of establishments that the publication is distributed to:

- i. A site is defined as “An establishment or separate business location primarily engaged in one economic activity at a single location. *For example, in the motor trade a chain with five body shops at different addresses would constitute five sites.*
- ii. Site numbers are shown as an additional column in the demographic tables.
- iii. Only places of work must be analysed, not home addresses.
- iv. For demographics, which relate to the Company not the individual (*for example: Industry / Business / Sector, Number of Employees*), you must apply the company level demographic to all individuals at a site regardless of the individual’s response.
- v. For individual-level demographics, *for example: Job Title, Purchasing Influence*:
  - You must analyse sites according to the individuals’ demographic responses
  - The total in the sites column may exceed the total number of sites, as different categories may occur at the same site. For this reason, we will not total the number of sites on the table and add an explanatory note.

**2. Demographic details must be supported by identifiable and verifiable evidence that is less than five years old**

- a) At the date you distribute a copy you must have identifiable and verifiable evidence to support the claimed demographic that meets the requirements of the evidence required under the Controlled Circulation section. Note:
  - i. The Audit Issue Mailing list must include against each addressee all demographic data included in your claim. You must ensure your coding system and any grouping of codes into demographic categories is explained clearly.
  - ii. If you have evidence from more than one source (which may be contradictory) you may choose which demographic and evidence you use to support your claim.
  - iii. If you group or convert the data from its original format on source documentation to the format on your database and/or claim then you must retain a record that explains the link between them.

## DIGITAL LICENCES - Optional

### DEFINITION

A Digital Licence is an agreement, either paid for or free, to provide the subscriber's multiple users with access to a digital copy of the publication for a contracted period.

You may report a Digital Licences as an optional table on the Certificate. Alternatively, you may report a bespoke analysis that is relevant to your publication (subject to the conditions set out in the Optional Reporting section) or use our templated criteria as set out below. This section contains a number of general principles that will guide you as to what may be acceptable for certification.

### PRINCIPLES

- 1. There must be a contractual arrangement between the publisher (or their agent) and the subscriber to provide the subscriber's multiple users access to a digital copy of the publication**
- 2. Licenses and Seats reported separately from print circulation**
- 3. Licences and Seats reported by rate – paid or free**
- 4. Licences and Seats reported by organisation type**

### REQUIREMENTS

- 1. There must be a contractual arrangement between the publisher (or their agent) and the subscriber to provide the subscriber's multiple users access to a digital copy of the publication**
  - a) The digital copy must be hosted either:
    - i. On the subscribing organisation's intranet; or
    - ii. Elsewhere and access is controlled via a log-in or password protected process.
  - b) The contracted period must be defined.
  - c) The number of multiple users ('Seats') must be stated. (I.e. General terms such as 'Global' or 'Companywide' are not permitted).
  - d) For free Digital Licences only, the contractual arrangement must include a requirement for the subscriber to notify all individual seats of the availability of each issue.
  - e) The digital copy accessed via the Digital Licence must meet the requirements to qualify as an Edition of the ABC certified publication.
- 2. Licenses and Seats reported separately from print circulation**

No additional requirements
- 3. Licences and Seats reported by rate – paid or free**
  - a) Licences and Seats will be reported by rate, either paid or free.
  - b) You can claim copies as paid Digital Licences where payment is outstanding as long as there are reasonable grounds to consider the debt to be live, good and collectable.
- 4. Licences and Seats reported by organisation type**
  - a) Digital Licences and Seats will be analysed by organisation type, the categories being at the publisher's discretion.

**REPORTING**

You will report the following, which will be shown on the ABC Certificate:

1. Audit Issue total Digital Licences and Seats analysed into:
  - a) Paid
  - b) Free

*Example Reporting: Audit issue digital licences analysis*

Organisation type	Total		Paid	Free
	No. Licences	No. Seats	No. Seats	No. Seats
Bank	<b>43</b>	<b>530</b>	530	
Pension	<b>52</b>	<b>612</b>	612	
Insurance	<b>100</b>	<b>800</b>	800	
<b>Total</b>	<b>195</b>	<b>1,942</b>	1,942	

## PUBLICATION ACTIVE VIEWS [Digital only] – Optional

### INTRODUCTON

You may opt to report digital copies using the metric Publication Active Views (PAVs). This could be:

- a) In addition to print and/or digital copy circulation on a single certificate.
- b) As a separate product in its own right, with or without any circulation reported, on a separate certificate.

As a separate and distinct metric, PAVs will not be incorporated into, or aggregated with circulation in ABC certificates or reports.

Please contact us to discuss requirements and costs as soon as possible, should you wish to consider reporting PAVs, as we will need time to inspect your systems and assess their suitability for audit.

### REQUIREMENTS

1. A Publication Active View is a single copy of a publication actively opened by a device for viewing, adhering to the following principles:
  - a) A minimum of one page of an issue (or a day) opened/served on/to a device.
    - i. A device may make a number of active views of an issue (or day), either together or at different times. Only one active view per device per issue (or day) can be claimed and reported.
    - ii. You must be able to provide evidence of active views by browser
  - b) Distinct action/event by the end user to view.
    - i. Note: 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.
  - c) The view request must be on an issue by issue (or daily) basis.
2. If you're reporting PAVs on a certificate alongside circulation, then the digital copies for which you're reporting PAVs must:
  - a) Be in keeping with the overall issue to be reported on the same ABC. Please refer to the Editions section.
  - b) Be published and available to the end user.
  - c) If accessed on a web site be restricted either by a "pay wall" or a "registration" gateway with a password requirement. This does not prevent digital copies from including links to free to access website content.
3. If you're reporting PAVs on a certificate without circulation, then the digital copies must:
  - a) Be edited, designed, and contain date-stamped content - it is not a website.
  - b) Be published and available to the end user.
  - c) Be published periodically on a regular and known frequency. e.g. 6 days a week/weekly/monthly etc.
    - i. If there is not an identifiable and regular publishing frequency then the period of measurement will not be per issue, but will default to the number of days the publication is available. i.e. if available every day then the number of days would be 365 per year (366 in a leap year): or if only available on Sundays then the number of days per year would be 52. Where this is the case the rules will refer to 'daily' in parenthesis.
  - d) Be presented in a navigation format such that the publication is divided into defined pages of content presented together.
  - e) If accessed on a web site be restricted either by a "pay wall" or a "registration" gateway with a password requirement. This does not prevent digital copies from including links to free to access website content.

- f) All be branded in common, if there are different editions
4. Advertising (by advertiser) must be common within a PAV edition, and once published remain unchanged (except for dynamically served advertising).
    - a) If non-dynamically served advertising (by advertiser) changes or there is a version not carrying advertising, this constitutes a different edition and the PAVs for each edition must be broken out on the certificate.
    - b) You may opt to report Total Edition Active Views, which is the unde-duplicated total of the reported Publication Active Views of all applicable editions (i.e. not de-duplicated by device). To be included in the Total Edition Active View figure, the edition must:
      - i. Be issued at a known and regular time.
      - ii. Remain available to the user with all other editions.
      - iii. Contain some new editorial compared to other editions
  5. We will need to check on an ongoing basis that issues (or content) are available for download or view. You must therefore provide us with free access to all issues (or days) and editions of the digital copy.
  6. You may opt to additionally report Publication Downloads, which are a single copy of a publication's content delivered, streamed or downloaded to a device available to read. To be included in a Publication Download figure:
    - a) The whole issue (or content) must be available to read.
    - b) The issue can be either 'pushed' or 'pulled'.
    - c) The issue must be requested by the end user on an issue by issue (or daily) basis or continuous basis.
  7. You may, as an option, make provisions for Publication Active Views that you expect to be made (or receive evidence of) after you have submitted your claim. Please note:
    - a) Provisions can only be made for digital copies that have identifiable issues.
    - b) The estimated Publication Active Views must be based on a reasonable assessment of information such as historic levels, seasonal trends or other market information.
    - c) You must adjust your claim in the following period to reflect any difference between the estimated and the actual figures.
    - d) If you make a provision for Publication Active Views you must also make an appropriate provision for any related metrics. For example: If you choose to make a provision for Publication Active Views, and you also report Total Edition Active Views, then you must make a provision for both metrics.

## REPORTING

1. You can choose to report monthly, 3-monthly, 6-monthly or 12-monthly on a continuous basis.
  - a) The periods may either follow calendar months or the equivalent dates for the relevant months according to the published ABC Accounting Calendar (i.e. allowing the period to include only whole weeks, starting on a Monday and ending on a Sunday).
  - b) If you're reporting PAVs on a certificate alongside circulation, then the period (by months) must align with the circulation months reported (but can be by the Monday to Sunday date basis).
2. You will report the following, which will be broken out on the certificate:
  - a) Average total PAVs per issue (or day) in the Reporting Period.
  - b) Total PAVs per issue (or day).
  - c) For each edition (if applicable), average total PAVs per issue (or day).

- d) The number of issues published in the period, or if there is not an identifiable and regular publishing frequency then the number of available days will be reported along with a note to that effect.
- e) A statement detailing how advertising is served (e.g. static and/or dynamic) and a statement detailing if there is an edition not carrying advertising.

## RETURN FORM SUBMISSION, AUDIT, CERTIFICATION

### DEFINITION

The Return Form is a submission in which the circulation claim is reported to ABC for certification. Each circulation claim is subject to audit.

### PRINCIPLES

1. **A Return Form must be submitted for the registered product for every applicable Reporting Period**
2. **The Return Form must be submitted by the Submission Deadline**
3. **ABC will issue a Certificate based on the Return Form**
4. **Each circulation claim is audited to verify it is in accordance with the applicable Reporting Standards**

### REQUIREMENTS

1. **A Return Form must be submitted for the registered product for every applicable Reporting Period**
  - a) You must submit a Return Form for the applicable mandatory and optional Reporting Periods you have chosen to report.
  - b) We will advise you how to submit your Return Form. *For example, online via the ABC eReturn website.* However, if you have not heard from us at the appropriate time please contact us.
  - c) You will submit your Return Form to us, authorised by an appropriate individual representing your organisation.
  - d) Whilst our systems contain some arithmetic and logic validation processes, the accuracy of the Return Form remains your responsibility.
  - e) Estimates and assumptions must not be made on the Return Form unless the Reporting Standards allow for them, or we have authorised them.
2. **The Return Form must be submitted by the Submission Deadline**
  - a) We will publicise the applicable Submission Deadline.
  - b) It is your responsibility to ensure Return Forms are submitted by the Submission Deadline. Failure to do so can result in a penalty and/or cancellation of your product's ABC registration under the ABC Byelaws.
3. **ABC will issue a Certificate based on the Return Form**
  - a) We will publish the certified data on our website subject to any timing criteria applicable to the sector. We may also make arrangements to provide our data to be published via commercial data providers and to those who subscribe to our data services.
  - b) We will confirm when circulation figures will become publicly available, normally 5 working days after a draft Certificate has been sent to you.
4. **Each circulation claim is audited to verify it is in accordance with the applicable Reporting Standards**
  - a) The audit must be carried out by ABC Staff Auditors.
  - b) Requirements in relation to the auditor and audits will be covered by the ABC Byelaws, ABC Audit Programmes and contractual arrangements.

- c) If following an audit, we identify material problems with the Return Form or Certificate then we will propose to revise the claim. If a Certificate has already been issued we will issue an updated certificate that identifies the changes. This replaces your original Certificate and must be used in its place. The process is as follows:
- i. We will send you a letter detailing the reason/problem giving rise to the amendment.
  - ii. You will have 10 working days from the receipt of this letter to provide any further information to us, or object to the revision of the claim.
  - iii. If you wish to object to the revision of the claim you must do this in writing to the Director of Audit who will investigate and provide a decision within 10 working days. If the objection is to a decision by the Director of Audit or the Chief Executive then the first level of appeal will be in accordance with the Review Procedure detailed in the ABC Byelaws.
  - iv. Subsequent Certificates will not be issued until we have resolved all queries on a previous audit and issued the updated Certificate, if applicable.
  - v. We identify updated certificates on our website.