



26th October 2018

Important changes for ROI Business Magazines

Following a comprehensive review, this document details significant changes to the ROI Business Magazine Reporting Standards, **effective from periods ending December 2018**

Aims

- Simplify without sacrificing quality
- Review level of detail
- Clearer and more accessible presentation of data

Key changes

- New certificate design – clearer, simpler, more charts ([view example certificate](#))
- Standardise reporting across sectors with four high level categories:
 - Free Copies
 - Membership Copies
 - Paid Single Copies
 - Paid Subscription Copies
- Extended age limit on Controlled Circulation requests and sources
- New routes to market – Monitored Free Distribution category added
- Other bulk distribution replaced by Sample Free Circulation and included in average
- Reporting paid circulation into rate bands becomes optional
- Remove little-used categories (paid and controlled, sponsored)

Please refer to the following pages for details of specific changes.

If you have any queries regarding the changes please do not hesitate to contact ABC enquiries@abc.org.uk



1. Controlled Circulation – allow longer ‘refresh rate’ of supporting data

- a. Extend current three year age limit on supporting evidence and age of requests to five years (retain request age analysis by year), i.e.

Current age of request	From Dec 2018 period
0 - 1 year	0 – 1 year
1 - 2 year	1 – 2 year
2 - 3 year	2 – 3 year
	3 – 4 year
	4 – 5 year

- b. Rename ‘Company request’ as ‘Colleague request’

2. Non-Controlled Circulation

- a. Cease breaking out this category into ‘By name’ and ‘Not by name’ and instead just report one row.

3. Monitored Free Distribution & Sample Free Distribution – new routes to market

- a. Introduce Monitored Free Distribution category (exists in Consumer Magazines) to allow regular free targeted copies, available for pick up from specified locations, to be included in the headline figures. For example a plumbing magazine made available for pick up in Plumbers’ Merchants
- b. Introduce Sample Free Distribution category (exists in Consumer Magazines) – as Monitored Free Distribution but allows irregular or one-off targeted distribution. This would replace the existing ‘Other Bulk Distribution’ standalone analysis and be included in the headline figure, as well as itemising the number of copies by each type of distribution by issue.

4. Membership Copies – simplify reporting

- a. Rename the Society category as ‘Membership Copies’
- b. Cease reporting the three categories (Paid Optional, Unpaid Requested, Non-Optional). This information could be reported as a separate analysis at the publisher’s option.

5. Retail sales – remove breakout by price

- a. Cease reporting copies analysed into ‘Full Rate’ and ‘Below Full rate’ (i.e. just one row for Paid Single Copies, comprising Retail Sales and Single Copy Sales)
- b. Publisher has option to report cover prices
- c. Remove reporting of average retail sales figure

6. Single Copy Subscriptions – remove breakout by rate bands

- a. Cease reporting copies analysed into the following rate bands:
 - Full Rate
 - 50-100% of Full Rate
 - 20-50% of Full Rate
 - 10-20% of Full Rate
 - Less than 10% of Full Rate

I.e. there will be just one row for Individual Subscriptions.



- b. The publisher has the option of reporting information on prices paid for subscriptions and/or subscription package information

7. Multiple Subscription Sales – remove breakout by rate bands

- a. Cease reporting copies analysed into five rate bands (i.e. there will be just one row for Multiple Subscriptions)

8. Paid and Controlled - remove

- a. Remove this category
- b. Copies would still be eligible under Paid Subscription Copies
- c. If the publisher wished to report additional information about copies meeting the Terms of Control this could be included as an optional analysis

9. Sponsored Subscription Sales - remove

- a. Remove this category
- b. Copies will still be eligible under Paid Multiple Subscriptions
- c. If the publisher wishes to report additional information about sponsor details/prices this can be included as an optional analysis

10. Digital Editions – remove restrictions related to pricing

- a. We have dropped the concept of higher and lower rate Digital Editions. Treatment of all paid copies is the same. This means you no longer need to capture the individual's details (name, email, postal address) for copies sold at less than 20% of cover price/subs rate.
- b. Where a print and Digital Edition is sold as a bundle to the same individual, the publisher can claim either print or digital but not both. There is no longer an option to claim print and digital should an individual pay more than 20% above the price.
- c. You may optionally report a statement of the total number of Digital Edition copies (or total print copies) circulated for the Audit Issue where some of them have not been claimed because they represent a duplicate copy to the same individual.
- d. The requirement to capture a postal address for free digital editions has been dropped. However if you do not capture the postal address you must have a common means of de-duplicating all individually distributed copies where details of the individual are required (for free and paid print copies and other free Digital Edition copies). An example of how to achieve this would be by collecting an email address for all print and Digital Edition copies that require the individual to be known.
- e. Remove minimum price restriction (20% of subscription rate) for Digital Edition gift subscriptions.

11. Demographic tables

- a. Standard presentation will be simplified with a single column of data against the demographics analysed rather than broken out between different types of circulation.

12. Digital Licenses

- a. Cease reporting licenses analysed into paid rate bands. These will be reported as paid or free

13. Duplication Level – change way duplicate copies treated

- a. Remove the requirement to report a percentage duplication level on the ABC certificate



- b. Circulation claimed will reflect one copy per individual (i.e. duplicate copies must be excluded) except in defined multiple categories or where the individual is not known (e.g. retail or Paid Multiple Subscriptions)

14. Issue analysis

- a. If a title publishes 18 or more issues a year then rather than listing each issue individually we will report:
 - i. The number of issues distributed in each month
 - ii. The average circulation of the issues distributed in each month
- b. The reporting of percentage issue variances greater than 10% from the average will be dropped for those titles publishing fewer than 18 issues a year (as individual issue circulations are reported)

The following changes, also effective from periods ending December 2018, were made outside of the above review.

15. Membership Copies

In some cases the current requirement that a publication must be confirmed as an 'official publication' of the Society (and that this is published on the ABC certificate) can cause issues because:

- The society may be unwilling to confirm official status as to do so may convey an incorrect impression that the magazine is the official mouthpiece of the society
- The publisher may consider the description casts doubt on their editorial independence

The Membership Copies category is not intended to represent simply copies sent to a society's members (these can be reported as controlled circulation). However the relationship of the magazine to the society provides a distinction in the relevance of the title to the society's membership.

It has therefore been agreed that a publication circulated to a society member as a benefit of their membership can be an alternative where a publication's official society status is not confirmed. If you claim copies on this basis you will need to be able to demonstrate this at audit.

The statement on the certificate would therefore either be:

1. This is [the/an] official publication of XYZ Society and copies are circulated as a member benefit
- Or
2. Copies circulated as a member benefit of XYZ Society

Amendment

Shading denotes new text added

Membership Copies [extract]

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



REPORTING

1. You will report Membership Copies as follows, which will be broken out on the ABC Certificate:

- a) By geographical type:
 - i) United Kingdom
 - ii) Other Countries

b) By total circulation for the Audit Issue.

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.

16. Sample Free Distribution – pre-approval

As part of the above reporting changes, the category ‘Sample Free Distribution’ replaced ‘Other Bulk Distribution’ for irregular or one-off targeted distribution. This is typically used in the Business sector for reporting copies delivered to Business Events where they are made available to attendees.

Other than including them in the total average and Audit Issue circulation there is no intention to add any additional requirements to the reporting of these copies under Sample Free Distribution.

The following changes to the Sample Free Distribution category keep key points of reporting the business event copies as they were under the previous ‘Other Bulk Distribution’ rules:

- You will not need to gain ABC’s advance agreement to claim these copies where they are:
 - Delivered to a trade event/seminar
 - Claimed ‘gross’ (i.e. the supply quantity)
 - Delivered to the trade event/seminar location by a third-party company whose business is distribution
- Back issues can be claimed and the distribution date of the sample distributions will be reported on the certificate. Back issues to be limited to 6 months old.

Amendment

Shading denotes new text added

Sample Free Distribution [extract]

1. Distribution uses an existing ABC Free Distribution category, without the need for a regular and consistent basis

- a) The requirements of the relevant Business Magazine Free Distribution category apply, with the exception that distribution may be of a single issue.
 - i) The Free Distribution categories eligible for reporting as Sample Free Distribution are:
 - Monitored Free Distribution
- b) Requirements relating to distribution across issues being on a regular and consistent basis and changes from previous issues are ignored.
- c) Under Sample Free Distribution you can claim distribution of back 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 under Sample Free Distribution up until 31st October.*



2. Prior notification of distribution details to ABC

You must obtain ABC's agreement in advance of the distribution for sample copies under the Monitored Free Distribution method, having provided full details of timings, delivery locations etc. This is to enable audit work to be conducted at the appropriate time, including real time testing where appropriate.

Note: You will not need to gain ABC's advance agreement where the Sample Free copies:

- Are delivered to a trade event
 - Are claimed 'gross' (i.e. the supply quantity)
 - Are delivered to the trade event location by a third-party company whose business is distribution.
- Note: This evidence should identify the title, issue and quantity*

REPORTING

You will report Sample Free Distribution as follows, which will be broken out on the certificate:

1. Audit Issue by geographical type:
 - a) United Kingdom
 - b) Other Countries
2. For each issue claimed an analysis as follows:
 - a) Distribution type. *E.g. Net distribution – by hand, Net distribution – other, Gross*
 - b) A statement describing how and where the copies are distributed (covering both the geographical location and type of distribution point).
 - c) The number of copies
 - d) Distribution date (*for example first day of exhibition*)

We will add the average number of copies across the period to this analysis.

Illustration of data required for Sample Free Distribution - Monitored Free Distribution

Issue	Distribution date	Description	Number of copies
March 2018	12/3/18	Gross Distribution - Accounting Conference, London O2	500
June 2018	20/6/18	Gross Distribution - Auditing Conference, Birmingham NEC	750
August 2018	2/8/18	Gross Distribution – Accounting Conference, Glasgow, IET	500
	Sample Free Distribution average over the 12 issues in the period		146

17. Digital Editions - requests

Up to now the standards have stipulated purchases or requests for Digital Edition copies must be specifically for the digital edition and not generically for the magazine.

A number of publishers have raised the restrictive nature of this requirement, particularly in relation to the wording on forms inviting recipients to request the magazine. It also creates issues around the flexibility to decide the format in which they deliver the magazine, particularly if they wish to maintain or extend their reach, but printing and distribution copies make this prohibitively expensive.

The reality is requested free copies are likely to represent an engaged recipient because they have chosen to ask to receive it. The risk of 'unwanted' copies is low for a digital edition because of the ease with which recipients can now opt out. In relation to paid copies the publisher will need to meet the expectations of the purchaser and we see less need to change the format supplied. However we see no reason for the ABC standards to dictate this decision.



Therefore a request for the publication will now not need to specify a Digital Edition format in order for copies to be claimed.

Amendment

Shading denotes new text and strike-through deleted text

Digital Editions [extract]

3. Digital Edition copies are opted in

- a) The individual must have either specifically purchased the Digital Edition publication, or requested to receive/view it, with the exception of:
- b) ~~Free Digital Edition copies do not need a specific request from the individual in the following circumstances:~~
 - i) ~~If they are~~ Copies claimed as Membership Copies, Controlled Colleague-Requested and Controlled non-requested categories of circulation
 - ii) ~~If they are~~ Corporate Digital Edition Subscription copies, where the individual is sent an email alert informing them that the issue is available for view/download.
 - iii) ~~If you are converting an existing recipient of a free requested print copy to a Digital Edition copy in accordance with the following:~~
 - ~~— You notify the recipient in advance of your intention to change the supply of their copy to a digital edition, and provide the recipient with the opportunity to opt out of receiving the digital edition before it is served.~~
 - ~~— You have not received an opt out from the individual.~~
 - ~~— You retain copies of the notifications of change and any opt outs received for audit.~~
 - ~~— The date of the original request (not the notification of change to digital) will remain the date of the request for ABC purposes.~~
 - ~~— You identify on the mailing list supplied for audit (e.g. via a code) those individuals who have been converted from a print to a digital requested copy together with the date of the conversion.~~

18. Group certificates

Group Certificates combine the circulations for two or more titles, allowing a publisher to present potential reach for advertising placed in those publications.

These are common amongst regional newspapers where the publications usually cover different geographical areas and the audiences are therefore different. However in the Business Magazine market there is more likely to be a cross-over in audiences with the result that the combined figure can cause confusion.

There are no publishers reporting an ABC Group Certificate in the ROI Business Magazine sector and this option is now removed.