

CIRCULATION

AUDITING

AROUND

THE WORLD

Argentina
Australia
Austria
Belgium
Brazil
China
Chinese Taipei
Czech Republic
Denmark

Finland
France
Germany
Hong Kong
Hungary
India
Italy
Japan
Korea

Malaysia
Mexico
Netherlands
New Zealand
Norway
Poland
Portugal
Romania
Serbia

Singapore
Spain
Sweden
Switzerland
United Kingdom
USA/Canada
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October 2010



Contents

3	PREFACE
4	IFABC
6	FACTS ABOUT IFABC
8	AUSTRALIA
14	BELGIUM
15	BRAZIL
16	CZECH REPUBLIC
19	FINLAND
21	HONG KONG
23	INDIA
25	ITALY CSST
26	JAPAN
27	KOREA
29	MALAYSIA
31	NETHERLANDS
33	POLAND
35	ROMANIA
36	SERBIA
37	SPAIN
39	SWEDEN
41	SWITZERLAND
43	TAIPEI
44	UNITED KINGDOM
46	USA ABC
48	BPA WORLDWIDE
50	IFABC MEMBER ORGANISATIONS

Preface

This edition of "Circulation Auditing Around the World" presents an up-to-date information on personnel, membership and verification services of circulation auditing organizations.

It is published for the information of advertisers, advertising and media agencies, media and other interested parties throughout the world who are interested in facts as a basis for efficient and effective advertising.

IFABC, which was founded in Stockholm in 1963, comprise 36 audit bureaux, in 33 countries.

Through IFABC, the bureaux work toward greater standardization and uniformity in the reporting of circulations and related media data.

Eusebio Serrano
President
2008 – 2010
OJD, Spain

IFABC

The first organized effort to verify circulation claims came in the United States. In 1914, advertisers and advertising agencies and publishers joined in a voluntary cooperative program, based on a common interest in reliable circulation data, to form the Audit Bureau of Circulations. Immediately thereafter several countries established similar organizations. As advertising and publishing became more important in international marketing, bureaus to verify circulation were organized in many countries.

IFABC was founded in 1963. During the 13th International Advertising Congress held in Stockholm that year, audit bureau leaders met in a Circulation Conference and set up a Working Committee, which framed IFABC's By-laws. These were adopted informally by delegates of ten organizations on May 29, 1963.

Every second year a General Assembly of members is held. The programs for the assemblies are planned and developed to further the objectives of the Federation. Assemblies have been held in New York, Paris, Munich, Copenhagen, London, Chicago, Madrid, Rio de Janeiro, Stockholm, Tokyo, Toronto, Buenos Aires, Lucerne, New Delhi, Berlin, Washington DC, Seville, Sydney, Kuala Lumpur, Berne, Cancun, and Seoul.

At each General Assembly, a representative of a member organization is elected by the members to the office of President (previously Secretary General), to serve as the executive officer of the Federation, voluntarily and without remuneration. The following individuals have served in that capacity:

Stig Marbeg	Sweden	1963–1964
Alan T Walcott	USA/Canada	1964–1966
Martial Buisson	France	1966–1968
Horst Schneider	Germany	1968–1970
Sukh Dev Kumar	India	1970–1972
Kenneth Derbyshire	United Kingdom	1972–1974
Ramon Sala-Balust	Spain	1974–1980
Patrick Sweeney	Canada	1980–1984
Bertil Klinte	Sweden	1984–1986
M David Keil	USA/Canada	1986–1988
Alain Meyer	France	1988–1992
C S Karnik	India	1992–1994
Uwe Albrecht	Germany	1994–1996
Christel Ploeger	Switzerland	1996–2000
Gloria Jarman	Australia	2000–2002
Eusebio Serrano	Spain	2002–2004
Christel Ploeger	Switzerland	2004–2006
Chris Boyd	United Kingdom	2006–2008
Eusebio Serrano	Spain	2008–2010

Facts About ABC

Why an Audit Bureau?

An independent audit bureau is a requisite for a credible and professional advertising industry. It also establishes a nation as a genuine and believable participant in the world of international advertising.

The assurance of accurate circulations claims and other information is of significant value to both advertisers and media alike. The value to advertisers, their advertising and media agencies, is the essential factor of accountability of advertising investments. The value of a bureau to media, while less immediately apparent, is the establishment and maintenance of standards of measurement and comparability in a forum in which both media and advertisers participate to form consensus.

The International Federation of Audit Bureaux of Circulations (IFABC) is a voluntary cooperative federation of industry-sponsored organizations established in nations throughout the world to verify and reports about the circulations of publications and related data as well as other auditable media 'circulation' and 'visits'.

IFABC Objectives

- To promote to advertisers, advertising agencies and media agencies and publishers worldwide the benefit of independent audit bureaux of circulations and the membership of IFABC.
- To promote an ethical and acceptable business standard of conduct by the Members and encourage the greater standardization and uniformity in the process, procedure and format of reporting of circulations of publications and other media data.
- To facilitate and encourage the exchange of facts, information, knowledge and experience among its members about circulations of publications and other media data.
- To encourage the establishment of audit bureaux of circulations in countries where such bureaux do not exist and their membership of IFABC.
- To co-operate with International organisations, suppliers and media in any way directly or indirectly connected with, or allied to, IFABC activities.

Membership Eligibility

Organisations that meet and maintain the following conditions and requirements shall be eligible for Full Membership of the IFABC.

A Full Member shall:

- Have a tripartite membership of advertisers, advertising agencies/media agencies and publishers.
- Determine its own definitions, terms, conditions and procedures for reporting circulations and other media within the sphere of their own activities.
- Publish its standards and rules for Member bureau audits and procedures.
- Perform independent auditing.
- Have transparency in its process.
- Issue circulation and/or other media data regularly.
- Issue facts about circulations and other media without expressing any opinions.
- Operate on the principles of 'not-for-profit'.
- Have a Founding Document inclusive of these conditions and requirements.
- Encourage membership and active participation in local audit bureaux by eligible advertisers, advertising agencies, publishers and other media agencies.

Audit Bureaux of Australia

The Audit Bureaux of Australia is comprised of the Audit Bureau of Circulations (ABC) and the Circulations Audit Board (CAB).

Established

The ABC was established in 1932. The CAB was established in 1957.

Member Since

1963

Staff

8 full-time staff, 1 part-time staff plus auditing contractors.

The ABC Chairman

Dr Stephen Hollings, *Director of Sales Strategy, News Ltd.*

The CAB Chairman

Rob Yeomans

Managing Director, Rank Publishing Co. Pty. Ltd.

Executive Director/CEO

Gordon Towell

- i) outdoor advertising signs;
- ii) trade exhibitions and conferences;
- iii) the exhibition of cinematograph films;
- iv) any method of a like nature to any of the matters in Rules 3.1.5 (a)(i) to (iii); and
- v) electronic or digital communication or media, including material disseminated by:

- subscription television;
- pay radio services; and
- the internet.

b) attendances at:

- i) trade exhibitions, conferences or any gathering of people for similar purposes; and
- ii) the exhibition of cinematograph films.

c) generally any data relating to the media industry, the auditing of which is intended to provide the industry with improved certainty and comparability of data for the benefit of the industry.

Membership

Print	1167
Websites	130
Digital Publications	37
Email Newsletters	4

Personnel Changes

In the last 18 months a Digital Services Manager has been hired to look after digital audit services and expand that area. Also a Marketing Officer was employed to focus on membership recruitment and retention. Finally a Database/Audit Support was hired recently to help support the audit process and reporting which is now online.

Objectives

- 1 To audit and provide the media industry with standardised circulation data.
- 2 To verify all media data through the audit process including on-line metrics.
- 3 To disseminate data to member companies.
- 4 Highlight the special status of the auditing of paid media by:
 - issuing standardised statements of paid sales of Publications (and of distribution in respect of Newspaper Inserted Magazines only);
 - verifying Auditor's examination of the data contained in Publisher's Statements in respect of the paid sales of their Publications (and in respect of the distribution of Newspaper Inserted Magazines only);
 - disseminating data concerning the circulation of Publications for the benefit of Members and to publish and distribute summaries of that data to Members;
 - auditing, and publishing reports on audits of:
 - a) aspects of the dissemination of material (including advertisements) by way of:

Economic Situation Relevant to Marketing and Publishing Activities

Australia's economy remained strong through the GFC supported by the mining sector and exports to China. However, marketing spend did fall substantially across all forms of media including TV, print, outdoor and on-line. In general, print publishers fared well despite the decline in ad revenues with both magazine and newspaper circulations declining only slightly overall compared to prior year. However, some magazine sectors have not done well, in particular Men's Lifestyle performed badly highlighted by the recent closure of "Ralph".

Status and Growth of Print Media as Compared to Other Media

Print media in general declined slightly over the past 12 months and is forecast to do so again next year. Substantial growth has been seen in online media and this is expected to continue strongly following the launch of Apple iPad devices.

Affiliation

The ABC and CAB work with numerous industry bodies including:

- Australian Media Associations
- Australian Association of National Advertisers
- Communications Council
- Australian Direct Marketing Association – ADMA
- Australian Interactive Media Industry Association – AIMIA
- Interactive Advertising Bureau – IAB
- Exhibition & Event Association of Australasia
- Internet Advertising Sales Houses of Australia – IASH
- Interactive Advertising Bureau – IAB
- Media Federation of Australia – MFA
- Magazine Publishers of Australia – MPA
- Newspaper Publishers Association – PANPA
- Publishers Australia
- The Newspaper Works

Finances (Revenue Profile)

ABC FINANCIAL REPORTS – INCOME STATEMENT

For the Year Ended June 30 2009

	NOTE	2009 (\$)	2008 (\$)
INCOME			
Membership Subscriptions		427,0999	351,095
Report Sales		17,3550	18,183
Audit Fees - Contractual Auditors		135,050	87,720
Miscellaneous Income		4,595	1,310
		584,105	458,314
OTHER INCOME			
Interest Received		44,185	48,206
		628,290	500,582

CAB FINANCIAL REPORTS – INCOME STATEMENT

For the Year Ended June 30 2009

	NOTE	2009 (\$)	2008 (\$)
INCOME			
Membership Subscriptions		341,058	317,375
Report Sales		260	2,702
Audit Fees - Contractual Auditors		343,420	348,546
Miscellaneous Income		5,756	4,400
		690,494	673,023
OTHER INCOME			
Interest Received		65,986	55,179
		756,480	728,202

Services Provided

- Consumer Magazine:** Circulation Audit An ABC Circulation Audit Service. This audit is for publishers of magazines with a majority paid circulation base.
- Consumer Newspaper:** Circulation Audit An ABC Circulation Audit Service. This audit is for publishers of newspapers with a majority paid circulation base.
- Web Audit Service:** The Web Audit service delivers Australia's first independent auditing solution for website traffic.
- Business to Business:** Distribution Audit A CAB Distribution Audit Service. This audit is for publishers of business and professional publications with any free or controlled distribution.
- Specialty Publications:** Distribution Audit A CAB Distribution Audit Service. This audit is for publishers of specialty publications with any free or controlled distribution.
- Profile Demographic:** Audit A CAB Distribution Audit Service. This is an optional additional audit for publishers of business-to-business publications with a registered database of recipients.
- Community Newspaper:** Audit A CAB Distribution Audit Service. This audit is for publishers of community newspapers including community language newspapers with any free or controlled distribution.
- Email Newsletter:** Audit A CAB Distribution Audit Service. This audit is for publishers of email newsletters with an opt-in distribution list.
- Event Audit:** A CAB Distribution Audit Service. This audit is for organisers of any conference, event or exhibition with a managed attendance process.
- Unaddressed Distribution:** Audit A CAB Distribution Audit Service. This audit is for distributors of any unaddressed item.
- Web Audit Service:** An CAB Audit Service. The Web Audit service delivers Australia's first independent auditing solution for website traffic.

Print Circulation Reports

ABC Release Dates

The ABC verifies the paid circulation per issue of a publication in a defined Audit Period.

The ABC has four reporting periods each year, covering 13-weeks for daily and weekly publications with circulation greater than 25,000 including National, Metropolitan, Newspaper Inserted Magazines, Saturday and Sunday Newspapers, Weekly Magazines and Regional Dailies.

Monthly magazines and publications with a circulation less than 25,000 report twice per year, with each of these periods covering 26 weeks.

- 13 week periods are January to March, April to June, July to September and October to December.
- 26 week periods are January to June, and July to December.

CAB Release Dates

This includes the Print Distribution Audit for the publishers of business, professional and specialty publications, community language publications and newspapers and community newspaper publishers.

A CAB print distribution audit verifies the average net distribution per issue of a publication in a defined audit period. Every copy within the defined six or twelve month period is verified to produce the Average Net Distribution of an issue. This highlights the printing and method of distribution, number of issues and the publishing frequency of each publication.

There are two audit periods, April to September, and October to March.

Digital Audits

Digital Publications

Monthly updates are available online. Metrics reported are Unique Views or Unique requests (PDFs).

The audit verifies the number of people visiting a digital publication online or downloading a PDF of a digital publication.

Email Newsletters

Monthly Updates are available online.

It reports on key metrics including:

- Average Net Delivery per Issue.
- Open rates.
- Click-throughs.
- Demographic details of recipients.

This audit verifies the number of email newsletters sent in a defined audit period. It reports the average volume of successful emails sent per issue to opt-in recipients. Audits are conducted at least twice per year.

Web Audits

Monthly Updates are available online.

It reports on key metrics including:

- Unique Browsers.
- Page Impressions.
- Sessions.
- Frequency.
- Duration.

This audit verifies the usage and placement of web measurement tags from the accredited web analytics system, Nielsen's Online's Market Intelligence. It also audits how the system is configured to collect and report users' traffic.

Other Audit Services

All Services are listed in Services provided.

Major Changes to By-Laws, Rules

In June 2009 ABC Members approved the addition of a new category of reporting within Average Net Paid Sales – called Bundled Sales which enables sales involving the bundling of a publication with other good(s) or service(s) to be included in Average Net Paid Sales. At the same time some housekeeping changes were also made specifically relating to magazine exclusion options to bring them into line with newspaper members. In June 2010 ABC Members approved a change requiring ABC Registered Auditors to attend accreditation workshops to maintain their registered status and support ABC through membership.

In 2008–2009 the CAB completed its first major overhaul of its Rules, By-Laws in 20 years as well as updating the Reporting Standard for Print. The first audits under the updated Reporting Standard took place with the April to September 2009 audit period and delivered new, detailed reporting for Bulk Distribution and additional reporting categories for distribution.

Special Issues/Challenges

Both bureaux face the challenge of the continued growth of digital and online media channels – working with media providers to bringing audited credibility and deliver visibility to media buyers.

Publicity

There are some set publicity guidelines in our rules. As stated below:

ABC Rules on Publicity

34.0 PUBLICITY

34.1 Statements by Applicants for Membership and Publisher Members Elect

- 34.1.1 An applicant for membership of the ABC may not make any reference to ABC membership until the applicant has been advised by the ABC that their application has been accepted and they have been admitted as a Member.
- 34.1.2 The Executive Committee may delay, for any period it considers appropriate, consideration of an application for membership where the applicant has not complied with Rule 34.1.1.
- 34.1.3 A Publisher Member Elect under Rule 6.3.1 in addition to the requirements of Rule 34.1.1:
- a) must not make any claim, representation or statement that they are a Member in respect of a publication until they are admitted as a Full Member in the class of Publisher Member for that publication under Rule 6.3.3; and
 - b) may state that their application for membership has been approved (and the month it was approved) and that the approval is conditional on their complying with the requirements for admission as a Publisher Member, but no other reference to the ABC may be used in that statement or any other publicity statement.

34.2 Use of ABC Logo Generally

- 34.2.1 Subject to Rule 34.2.2, a Full Member may use:
- a) the logo of the ABC; and
 - b) words denoting membership of the ABC, on its letterheads, advertising matter or publications while they are a Member.
- 34.2.2 A Publisher Member must not use the logo of the ABC or words denoting its membership of the ABC:
- a) in respect of a Publication until it is admitted as a Full Member in respect of that Publication in accordance with Rule 6.3; or
 - b) in connection with any publication which is not the subject of a membership of the ABC.

34.3 No Publicity Until Circulation Summary Published

A Member must not, and must not allow another person to, publicise the content of any Circulation Statement before:

- 34.3.1 that content is accepted by the ABC for inclusion in a Circulation Summary and formally released to members in a preliminary release of circulation data which will appear in a Circulation Summary to be distributed to Members in accordance with Rule 32.1; and
- 34.3.2 the date stipulated in the ABC's preliminary release made under Rule 34.3.1.

34.4 Use of ABC Logo and Statements in Relation to Circulation Data

- 34.4.1 A Member must not use or position the logo of the ABC in connection with any statement concerning the circulation data for a Publication in such a way as to imply that non-audited data has been Audited and accepted by the ABC under these Rules.
- 34.4.2 If a Member makes any statement concerning the circulation data for a Publication and involving any figures sourced to the ABC or the ABC's Circulation Summaries, that statement:

- a) must acknowledge the ABC as the source of the figures and include the figures appearing in the ABC's most recently published Circulation Summary, or Notice of Amendment;
- b) must clearly indicate whether the figures have been the subject of a Circulation Audit or not;
- c) must state the Reporting Period to which the figures relate;
- d) must not accumulate or calculate figures across:
 - i) the categories of Average Net Paid Sales and Average Other Sales (both as defined in Schedule 3) and must not refer to Average Other Sales without also referring to Average Net Paid Sales and explaining the difference between them;
 - ii) the categories of sales in Australia, New Zealand and other countries; or
 - iii) the print and Digital Version Average Net Paid Sales of a Publication; or
 - iv) Reporting Periods, to create other figures which do not appear in any Circulation Summary or which relate to periods which are not Reporting Periods for the Publication; and
- e) where eighty per cent or more of Average Net Paid Sales (as defined in Schedule 3) in Australia are attributable to one of the categories stipulated in Rule S3-2.3.2 in Schedule 3, must clearly indicate the actual percentage of those Average Net Paid Sales in that category.

34.5 Statements of Comparison

If a Member makes any statement involving a comparison of circulation data, they must comply with the following requirements in relation to that statement:

- 34.5.1 The Member must comply with Rule 34.4.2.
- 34.5.2 Where a comparison is made between figures sourced to the ABC or the ABC's Circulation Summaries, the Reporting Period for each figure must be shown and the same Reporting Periods must be compared if available.
- 34.5.3 Comparisons must be on a like for like basis and figures must not be manipulated so as to create or attempt to create a false impression.
- 34.5.4 If the publishing frequencies of the Publications being compared are different, the comparison must include their respective frequencies.
- 34.5.5 A Member must not compare data relating to an Audit Report or an Audit Period with data relating to a Publisher's Statement or a Statement Period.
- 34.5.6 A Member must not compare figures sourced to the ABC or the ABC's Circulation Summaries for a Publication with figures:
 - a) from any other source; or
 - b) relating to a publication not published by a Publisher Member, so as to create an impression that the sets of figures can be compared on an equal footing.

34.6 Statements Concerning Circulation Generally

- 34.6.1 Subject to Rule 34.6.2, a Publisher Member may make general statements concerning the aspects of the field of circulation, the quality of circulation or the merits of their publication generally.
- 34.6.2 Any statement made by a Publisher Member of the nature described in Rule 34.6.1 must not be made in such a manner so as to appear in any way to:

- a) have been issued with the imprimatur or the authority of; or
- b) be associated with, the ABC.

34.7 Provisions Relating to ABVS Information

The provisions of this Rule 34.0 apply, with the necessary changes being made, to any statement by a Member concerning any figures sourced to the ABVS, the result of any ABVS Audit or the content of any ABVS Audit report, all pursuant to Rule 33.0.

34.8 Restriction on Use of ABC Communications

A Member must not reproduce, republish or release any part of any correspondence or other communication from the ABC unless:

- a) required by law; or
- b) the Member obtains the prior written consent of the Executive Committee, which may be given subject to any conditions which the Executive Committee determines.

Interesting Developments within the Bureau

- All data reporting now online.
- Introduction of Web Audits in June 2009 followed by steady growth in this area.
- Introduction of Digital Audits.
- Launch of Digital Watchdog Committee which has set new digital rules and guidelines.
- Introduction of Masthead Reports where a title which has more than one media channel audited can showcase their complete audience in a simple report.
- Involved in more conferences. ABA staff spoke at Ad:Tech and Mumbrella Master Class.
- Introduction of additional marketing initiatives available to members including the 'AdLift Campaign'.
- Free Advertisers Trial to data encourage stronger relationships with direct advertisers.
- Introduction of regular members' newsletter
- More detailed reporting available to members including trend reporting.
- Extensive historical data will be available shortly online.

Other Relevant Activities

- Newsletters are distributed at least four times per year.
- Training sessions and workshops are offered to members and non-members about the benefits of audited media.
- Regular attendance at conferences and speaking events such as Ad:Tech, MuMbrella, Media & Broadcasting Conference etc.
- Networking with other Bureaux.

Plans and Opportunities for the Future

ABC Members are currently exploring reporting opportunities related to Issue Specific Reporting. At the same time reporting of sales of digital publications such as ipad apps is currently under review.

Appendix A—ABC Audit Period Schedule

13-Week Audit Period Schedule—2010

Audit Period for Audit Reports: the periods: 1 January to 31 March; 1 April to 30 June; 1 July to 30 September; and 1 October to 31 December; or thirteen weeks in each period of three months nearest the periods.

All periods including the start and finish dates for:

- National Newspapers (a);
- Metropolitan Monday – Friday Newspapers (b);
- Metropolitan Saturday Newspapers (c);
- Metropolitan Sunday Newspapers (d);
- Regional Daily Newspapers with an *Average Issue Circulation of 25,000 copies or more (e);
- Regional Sunday Newspapers with an *Average Issue Circulation of 25,000 copies or more (f);
- Country Press with an *Average Issue Circulation of 25,000 copies or more (g);
- Newspaper inserted magazines provided with a Newspaper nominated (a) to (g); and
- Weekly Magazines with an *Average Issue Circulation of 25,000 copies or more.

**Definition: Average Issue Circulation means Average Net Paid Sales for each Issue of a Publication in its primary country of circulation for a Reporting Period.*

January to March 2010

Mon–Sat	28.12.2009 to 27.03.2010	13 weeks
Mon–Fri	28.12.2009 to 26.03.2010	13 weeks
Saturday	02.01.2010 to 27.03.2010	13 weeks
Sunday	03.01.2010 to 28.03.2010	13 weeks

*Deadline Lodgement Date: April 30, 2010
Preliminary Release Date¹: Tuesday May 11, 2010
Embargo to Friday May 14, 2010*

April to June 2010

Mon–Sat	29.03.2010 to 26.06.2010	13 weeks
Mon–Fri	29.03.2010 to 25.06.2010	13 weeks
Saturday	03.04.2010 to 26.06.2010	13 weeks
Sunday	04.04.2010 to 27.06.2010	13 weeks

*Deadline Lodgement Date: July 30, 2010
Preliminary Release Date¹: Tuesday August 10, 2010
Embargo to Friday August 13, 2010*

July to September 2010

Mon–Sat	28.06.2010 to 25.09.2010	13 weeks
Mon–Fri	28.06.2010 to 24.09.2010	13 weeks
Saturday	03.07.2010 to 25.09.2010	13 weeks
Sunday	04.07.2010 to 26.09.2010	13 weeks

*Deadline Lodgement Date: November 1, 2010
Preliminary Release Date¹: Tuesday November 9, 2010
Embargo to Friday November 12, 2010*

October to December 2010

Mon–Sat	27.09.2010 to 25.12.2010	13 weeks
Mon–Fri	27.09.2010 to 24.12.2010	13 weeks
Saturday	02.10.2010 to 25.12.2010	13 weeks
Sunday	03.10.2010 to 26.12.2010	13 weeks

*Deadline Lodgement Date: January 31, 2011
Preliminary Release Date¹: Tuesday February 8, 2011
Embargo to Friday February 11, 2011*

26-Week Audit Period Schedule—2010 and 2011

Frequency of submitting Twenty-Six week Audit Reports or Publisher's Statements:

The periods: January to June 2010, July to December 2010; January to June 2011; July to December 2011; or Twenty-Six weeks in each period of six months nearest the periods. All periods to include the start and finish dates as detailed below.

Magazines (not being Weekly Magazines) with an *Average Issue Circulation of 25,000 copies or more must audit every six-month periods.

Publisher members publishing:

- Regional Daily Newspapers with an Average Issue Circulation less than 25,000 copies (a);
- Regional Sunday Newspapers with an Average Issue Circulation less than 25,000 copies (b);
- Country Press with an *Average Issue Circulation of less than 25,000 copies (c);
- Newspaper Inserted magazines provided with the Newspapers nominated in (a), (b), or (c); or
- Any Magazine with an *Average Issue Circulation less than 25,000 copies

The above publishers will audit at least one 26-week period Or twenty-six weeks in one period nearest either of the periods. However, a publisher member with an average issue circulation less than 25,000 may elect to provide audit reports every 13-weeks or audit each 26-week period.

**Definition: Average Issue Circulation means Average Net Paid Sales for each Issue of a Publication in its primary country of circulation for a Reporting Period.*

January to June 2010

Mon–Sat	28.12.2009 to 26.06.2010	26 weeks
Mon–Fri	28.12.2009 to 25.06.2010	26 weeks
Saturday	02.01.2010 to 26.06.2010	26 weeks
Sunday	03.01.2010 to 27.06.2010	26 weeks

*Deadline Lodgement Date: July 30, 2010
Preliminary Release Date¹: Tuesday August 10, 2010
Embargo to Friday August 13, 2010*

July to December 2010

Mon–Sat	28.06.2010 to 25.12.2010	26 weeks
Mon–Fri	28.06.2010 to 24.12.2010	26 weeks
Saturday	03.07.2010 to 25.12.2010	26 weeks
Sunday	04.07.2010 to 26.12.2009	26 weeks

*Deadline Lodgement Date: January 31, 2011
Preliminary Release Date¹: Tuesday February 8, 2011
Embargo to Friday February 11, 2011*

January to June 2011

Mon–Sat	27.12.2010 to 25.06.2011	26 weeks
Mon–Fri	27.12.2010 to 24.06.2011	26 weeks
Saturday	01.01.2011 to 25.06.2011	26 weeks
Sunday	02.01.2011 to 26.06.2011	26 weeks

*Deadline Lodgement Date: July 30, 2011
Preliminary Release Date¹: to be advised
Embargo to be advised*

¹ Only subscribers who have signed the NDA will receive the Preliminary Release

July to December 2011

Mon–Sat	27.06.2011 to 31.12.2011	27 weeks
Mon–Fri	27.06.2011 to 30.12.2011	27 weeks
Saturday	02.07.2011 to 31.12.2011	27 weeks
Sunday	03.07.2011 to 01.01.2012	27 weeks

Deadline Lodgement Date: January 30, 2012

Preliminary Release Date1: to be advised

Embargo to be advised

Appendix B—CAB Audit Period Schedule

Audit Period Schedule—2011

The CAB audit requirement is based on the type of publication and then frequency of publication. All Community Newspapers and Community Language Newspapers must audit each 6-month audit period.

Business, Professional and Specialty Media Members that publish 13 issues or more per year must audit every 6 months. Publications that publish 12 issues or less per year can audit a 12-month period—either April to March or October to September.

The following are the defined audit periods, lodgement and data release dates for 2011.

6-month audit periods

October 1, 2010 to March 31, 2011

Deadline to send records to Auditors: April 12, 2011

Deadline Lodgement Date: April 29, 2011

Preliminary Release: May 18, 2011

Embargo to Friday May 20, 2011

April 1 to September 30, 2011

Deadline to send records to Auditors: October 11, 2011

Deadline Lodgement Date: October 31, 2011

Preliminary Release Date: November 23, 2011

Embargo to Friday November 25, 2011

12-month audit periods

April 1, 2010 to March 31, 2011

Deadline to send records to Auditors: April 12, 2011

Deadline Lodgement Date: April 29, 2011

Preliminary Release: May 18, 2011

Embargo to Friday May 20, 2011

October 1, 2010 to September 30, 2011

Deadline to send records to Auditors: October 11, 2011

Deadline Lodgement Date: October 31, 2011

Preliminary Release Date: November 23, 2011

Embargo to Friday November 25, 2011

CIM (Centre for Information about the Media)

Contact

W <http://www.cim.be>

Established

1971

Member Since

2000

Staff

12

Chairman

Patrick de Borchgrave

Executive Director/CEO

Stef Peeters

Membership

450 titles in authentication

Affiliation

IFABC, i-JIC, EMRO

Services Provided

Deliver to its members, in a continuous or regular way, as soon as possible, precise, objective and reliable information on media audiences, their characteristics and the performances, obtained through studies, conceived and defined through the CIM, realized, controlled and verified by the CIM, in a neutral and singleness of sources and references.

Print Circulation Reports

Each quarter all editors declare their figures 'on honour' and this for all titles. 4 Times a year there is a publication. After each year these figures are verified by a bureau of audit. They establish a report that includes the figures for the past year. These figures are published throughout the year.

Major Changes to By-Laws, Rules

Modifications in the By-laws and rules in 2010:

By-laws: article 8 about the exclusion of a member has been modified, article 41 has been suppressed

Regulations of the CIM: change in article 3 (use of the CIM figures) and article 6 (members)

Some changes in specific rules for the surveys.

IVC (Instituto Verificador de Circulação)

Country

Brazilian communication market also suffered with the world financial crisis. After the losses that this market had in the end of 2008 and beginning of 2009, in the last months, this market reacted and it is almost in the same platform before the crisis.

Established

November 1961

Member Since

1963

Staff

37

Chairman

Flávio Augusto Resende – DPZ (agency)

Executive Director/CEO

Pedro Martins da Silva

Membership

Newspaper	101
Magazines	352
Websites	28
Advertising agencies	175
Subscribers	20
Advertisers	17

Personnel Changes

New CEO: Pedro Martins da Silva.

New managers on internal every division.

Objectives

- Grow the number of affiliations, mainly for the websites business. At this moment, we audit 28 websites and our plan is to reach 100 websites until the end of this year; and
- Implement the electronic transfer of documents and report to audit newspapers and magazines.

Status and Growth of Print Media as Compared to Other Media

Newspapers have reduced their circulation by 3.6% when compared to 2008. Magazines have increased their circulation by 2.4% when compared to 2008. Due to the global economic crisis newspaper editors in Brazil have cut their investments both on subscription campaigns and new titles. Magazine editors have kept their plans for new titles and subscriptions.

On advertising spending there has been a reduction on magazines of 6.2% and on newspapers of 8.1%. Total advertising spending has increased by 4.0%. TV grew 7.7%, Internet 25.2% and Radio 9.4%. Total advertising spending in 2009 was split as follows: TV 60.9%, Newspaper 14.0%, Magazines 7.7%, Radio 4.4%, Internet 4.3%, Cable TV 3.7%, External Media 3.0%, Other 2.0%.

Affiliation

Newspaper (ANJ), Magazines (ANER, ANATEC), Internet (IAB).

Finances (Revenue Profile)

Around US\$185.000 per month, provided by mensal contribution and the cost of auditorship.

Services Provided

Auditorship of newspapers, magazines and web sites

Print Circulation Reports

The auditorial report for newspapers and magazines provides the verification of the numbers informed for the vehicle during each semester. The adopted procedures to audit the circulation data, obey the standards established by the IFABC – International Federation of Audit Bureaux of Circulations. Internal controls are examined, in accordance with the type of circulation, including accountings.

Digital Audits

Standardization following the IFABC – International Federation of Audit Bureaux of Circulations, this service offers to the market interactive audience: newspaper on line, vertical sites (segmented) and regional sites. Every month, the auditorship provides the analysis of logs through the measurement tools web analytics, such as: Certifica(ComScore), Google Analytics (free version), Omniture, Predicta Atmosphere, WebTrends. Metrics used are: unique browser, page impressions and visits.

Major Changes to By-Laws, Rules

IVC restructured its governance: reducing the number of directors on the board from 27 to 24; creating four committees for ruling on technical matters (newspaper, magazines, controlled publications and websites).

Special Issues/Challenges

Consolidate the websites business and following the future of print media.

Publicity

Our current advertising campaign for newspapers and magazines was developed by the agency Publicis. The affiliated vehicles publish our announcements as courtesy.

Interesting Developments within the Bureau

Significant changes in Governance, websites auditing startup.

Plans and Opportunities for the Future

- IVC Light: simplified version to audit newspaper with small circulation;
- Auditorship of gratuitous publications (daily or weekly gratuitous newspapers);
- expand audited websites from 28 to +150.

Audit Bureau of Circulations Czech Republic

Country

The Czech Republic is a landlocked country, lying in central part of Europe. The country covers the area of approximately 78.860 km² and its population is 10.5 million (about 7.4 million in productive age = age 15–64).

ABC R is a non-profit organization and an association of corporations having tripartite sponsorship, formed of – the Czech Publishers Association, the Association of Communications Agencies and the Czech Association of Branded Products.

In the Czech Republic, auditing circulations has been taking place since March 1993, when this service was ensured organizationally and methodically by the Czech Publishers Association. Since January 1st, 1997, ABC R has ensured publishing and auditing circulations to the full extent.

Contact

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E abccr@abccr.cz
W <http://www.abccr.cz>

Established

1996

Member Since

1997

Staff

4 + chairman (chairman, manager, 2 print media auditors and office manager)

Chairman

Ing. Kv toslava echová

Manager

Ing. Kate ina Mandíková

Membership

Our members are our founders: the Czech Publishers Association, the Association of Communications Agencies (AKA) and the Czech Association of Branded Products (SZV). They are "representatives" of publishers, advertising and communications agencies and advertisers. The proportion among the tripartite members in the General Assembly is 3:1:1 (publishers: advertising agencies: advertisers). There are 51 publishers with 162 titles (paid publications) and 25 publishers with 48 titles (free publications) in our system of auditing.

Economic Situation Relevant to Marketing and Publishing Activities

The 2009 GDP was CZK 3 627 billion (US\$ 185 billion/EUR 141) and GDP per capita was CZK 345 727 (US\$ 17,603/EUR 13 447) per year. In the last year the decrease of GDP was 4.2%.

In 2009 the average gross salary per month was CZK 23,598 (US\$ 1 202/EUR 918) and inflation was 1%. The rate of unemployment was 6.7%.

According to the latest statistical figures there are 8.92 million inhabitants aged 12 to 79 potential readers of newspapers and magazines.

The current average price of a newspaper varies from CZK 7.00 (approx. EUR 0.27) to CZK 23.00 (approx. EUR 0.89). Prices of magazines vary from CZK 8.00 (approx. EUR 0.31) to CZK 249.90 (approx. EUR 9.72) with respect to the type and frequency.

Plans and Opportunities for the Future

- There is just one free newspaper on the print market (Metro) now, which is audited. The other free newspaper E15 isn't in our system.
- At the beginning of 2009, one paid newspaper was stopped, the tabloid Šíp.
- The magazine market isn't very stable. Editions of some titles were stopped but on the other side some new magazines have appeared. Publishers stopped mainly issuing special editions of main titles.
- Publishers are afraid of launching new titles, because of the financial crisis. On the contrary, they are closing existing titles. Sometimes the publishers stop only to verify the titles, because of decrease of circulations.
- We have a new methodology for auditing digital publications/e-papers, effective from 1.7.2009. Up until this date we verified digital publications too, but it was only one part of the main methodology for auditing circulations of periodic press. The figures of digital editions were presented separately, but combined together for (aggregate to) the average paid circulations. Now the figures are published in a separate table and are verified according to the new methodology for auditing digital publications.
- The new version of our website (www.abccr.cz) started at the beginning of this year. We have an English version of our website as well.

Services Provided/Auditing

The titles are verified in two separate groups, which are:

- Copies sold via subscription or over the counter** (Paid publications/Periodic press) In this system we audit:
 - **Press Run:** The total number of printed copies, for which legal accounting documents exist;
 - **Total Sales/Paid Circulations:** The sum of copies from retail sales, subscription and other paid form of circulations for which the publisher receives at least 51% of the cover price;
 - **Other and Controlled Distribution (above standard service):** The number of free copies or for which the publisher receives max 50% of the cover price;
 - **Total distributed circulation (above standard service):** Paid Circulations + Other and Controlled Distribution;
 - **Digital Editions/e-papers (above standard service):** The publisher must receive for these copies at least 35% of the cover price.

The data are released each month. The publications are published in the circulation reviews according to periodicity in alphabetical order. On a regular basis, the data are published at www.abccr.cz and in specialist journals. Our member – the Czech Publishers Association, publishes our data in its documents in order to compare circulations versus readership data etc. too. ABC R verifies the circulations every half year in a random

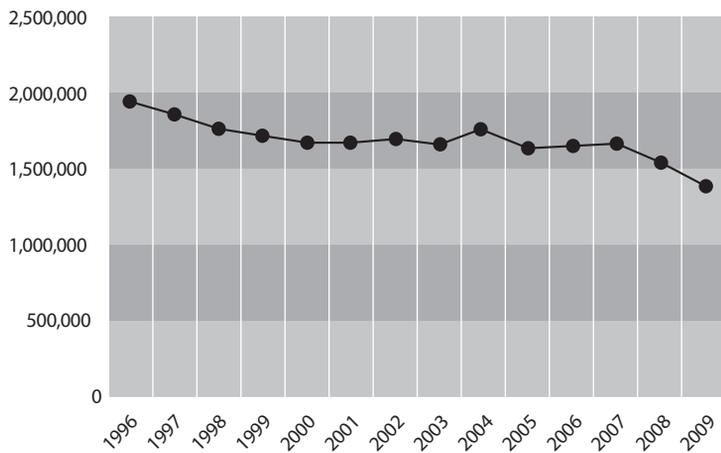


Fig. 1
Average daily sales of national and regional newspapers between 1996 and 2009 (audited paid publications).

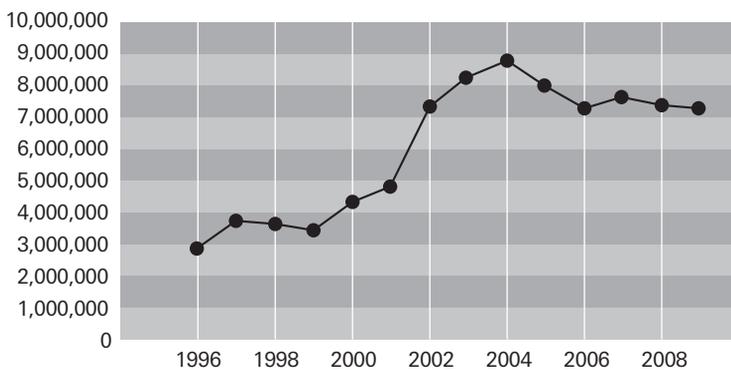


Fig. 2
Average monthly sales of magazines in period between 1996 and 2009 (audited paid publications).

chosen month. Once a year the copies sold over the counter are audited at distributors. The circulation audit certificates/reports are not available for downloading on our website. Only the publisher receives the report. But all data are published each month on our website and the final report of all titles for the auditing period, which is a half-year, is published on our website as well. So all these information are available to the public.

In the system of paid publications, the prices are set by the number of total sales and their periodicity. For example, the lowest price is paid by a monthly edition with total sales of up to 10 000 copies and the highest price is paid by a daily edition with total sales of over 300 000 copies.

The information about auditing and publishing of data are contained in Methodologies of ABC R. Figures may be reprinted by remarking "Source-ABC ČR" and without any commentary in the tables. ABC R undertakes not to comment published data.

The new methodology for publishing and auditing digital editions of printed titles is valid from 1.7.2009. The digital edition of newspapers and magazines is a copy of the printed edition of a specific title transferred into digital form available to internet users using basic browsers. The digital edition must maximally resemble the original printed edition by editorial and advertising content and design (= replica). A requirement for auditing digital editions of newspapers and magazines is the existence of a printed copy audited by ABC R. The digital edition must be sold at minimally 35% of the basic cover price of the printed copy. The data are released each month and data are published in a separate table.

b) Copies of advertising and business publications

(Free publications) Free publications are primary distributed in bulk and free of charge or for some member's fee. Publications are issued under the same name at least once per year and are primary aimed for promotion of products, goods and services, for advertising etc. In this system ABC R verifies:

- Press Run.
- Controlled Distribution.
- Number of distribution points.

There is a new methodology for free publications since 2007. The data are released each month and the free publications are published in the circulation reviews according to periodicity in alphabetical order as separate tables. On a regular basis, the data are published at www.abccr.cz and in specialist journals. ABC R verifies data twice a year and each month in a given year is verified in this system.

There is only one price set for all titles in the system of free publication. The price for verifying distribution points depends on the number, how many distribution points will be audited.

Share of Print Media in Advertising Expenditures between 1996 to 2009 (in billion CZK before tax)

Information received from the Czech Publishers Association

YEAR	Print	TV	Radio	Internet	Cinema	Outdoor	TOTAL
2001	11.100	15.000	1.600	0.240	—	—	27.940
2002	12.800	15.500	1.900	0.320	—	—	30.520
2003	13.600	17.200	2.200	0.430	—	—	33.430
2004	15.500	18.200	2.100	0.800	—	—	36.600
2005	16.800	21.300	2.700	1.000	—	—	41.800
2006	18.913	23.681	3.214	1.300	0.199	2.108	49.415
2007	19.128	24.373	3.291	3.442	0.192	2.313	52.739
2008	20.008	26.744	3.313	5.000	0.138	3.963	59.166
2009	18.100	28.400	3.300	6.400	0.100	3.300	59.600

Total Number of Audited Titles

AUDITING PAID PUBLICATIONS	2003	2004	2005	2006	2007	2008	2009
Dailies*	6+53	6+9	7+9	9	9	9	8
Magazines	71	97	142	161	173	169	154
TOTAL	130	112	158	170	182	178	162

*(national+regional)

AUDITING FREE PUBLICATIONS	2003	2004	2005	2006	2007	2008	2009
Dailies	–	–	–	–	3	1	1
Magazines	–	–	–	–	50	58	47
TOTAL	–	–	–	–	53	59	48

Affiliation

There is an intention to support the circulation audit through close cooperation with the Association of Advertising Agencies and the Czech Publishers Association.

Financing (Sources and Growth)

Financing

Advertisers fee	0.5%
Advertising Agencies fee	0.5%
The Czech Publishers Association fee	2.0%
Service payments	97.0%
TOTAL	100.0%

Governance and Management

- The General Assembly; it's the main body of ABC R. The GA elects the Chairman.
- The Chairman; he/she is an executive body. He/she is the chairman of the Methodology Committee too.
- The Bookkeeping Revisory Committee; the committee controls the bookkeeping of ABC R.
- The Methodology Committee; it's a professional board and is comprised of the representatives of members (at least of 3 publishers, 1 advertising agency and 1 advertiser). There are 13 members in the Methodology Committee now (10:2:1).
- The Manager; he/she is responsible for routine procedures/ordinary services. The manager is appointed by the chairman. The manager can audit too.
- Auditor; there are 2 internal auditors in ABC R. Each auditor is responsible for her/his work. The publishers are divided into two parts and each auditor verifies/audits one half.
- Office Manager.

Subject of Activity

The mission of ABC R is to objectify information and data on the media market. In the field of periodic press, it principally focuses its activities on:

- Gathering circulation reports on periodic press and compiling them.
- Publishing circulation results on periodic press and providing them to publishers, advertising agencies, advertisers and IF ABC members.
- Auditing circulation data for periodic press according to the contracts and accounting records of publishers and distributors.
- Methodical and co-ordinating activities.

Finnish Audit Bureau of Circulations Ltd.

Country

The population density is 18 persons per square kilometre. Official languages are Finnish (91%) and Swedish (5%).

Contact

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W www.levikintarkastus.fi

Established

1955

Member Since

1963 (IFABC Founding Member)

Staff

Number of personnel (3) has stayed invariable.

Chairman

Sales and Marketing Director Timo Kopra,
Otavamedia Ltd.

Executive Director/CEO

Ullamaija Arasto

Membership

Levikintarkastus Oy has no members.

SHAREHOLDERS

Publishers	61
Marketing communication agencies	12
Advertisers	17
Media trade bodies	4

Objectives

- 1 To produce impartial, reliable information about media in order to help customers' business—in developing their media or in selling and buying advertising space.
- 2 To conduct circulation and exhibitions audits and organize media researches within the branch.
- 3 To promote such working methods which improve impartiality, reliability and efficiency as well as cooperation between different interest groups.

Economic Situation Relevant to Marketing and Publishing Activities

The advertising investments without planning and production costs during 2009 were 1,263 million€ (-15.8% compared to 2008) according to TNS Gallup/Media Intelligence.

Newspapers' share of the total was 37.5%, magazines' 12.4%, free papers' 5.4%, printed directories' 6.4%, TV's 18.8%, radio's 3.9%, movies' 0.2%, web's 12.5% and outdoor's 2.9%.

The changes in advertising investments compared to 2008 were: newspapers -21.6%, magazines -22.6%, free papers -18.7%, printed directories -14.1%, TV -11.6%, radio -1.7%, movies -20.6%, web +6.0%, outdoor -17.5%.

Status and Growth of Print Media as Compared to Other Media

The print media dominate the mass media economy in Finland and the newspaper circulation per capita is the second highest in the EU and third highest in the world. In 2009, 29 new magazine titles were launched.

Affiliation

The board of Directors consists of 10 members: 6 representing publishers (nominated by Finnish Periodicals Publishers Association and Finnish Newspapers Association) and 4 representing advertisers and advertising agencies (nominated by Association of Finnish Advertisers and Finnish Association of Marketing Communication Agencies).

Finances (Revenue Profile)

Economy of the company is based on non-profit principle. 70% of revenue comes from audit fees and 30% from research fees.

Services Provided

1 Print and e-paper audits:

- 95% of newspapers published in Finland are audited.
- 65% of paid magazines selling advertising space in Finland are audited.
- Total number of circulation audits concerning the year 2009 was 414. Number of newspaper audits was 206 and magazine audits 204.
- Only four electronic paper titles were audited.
- Bureau also compiled the statistics of regional circulations of audited newspapers.

- 2 Exhibition audits according to the international standards:
 - 86 fairs and exhibitions organized in the year 2009 were audited.
- 3 Organization of Joint Industry Committee of National Readership Survey:
 - NRS is based on 28,000 telephone interviews per year (NRS Reader) and on 14,000 self completion questionnaires per year (NRS Regional and NRS Consumer).
 - Within KMT 2009 there were 183 titles surveyed nationally and 226 titles surveyed regionally.

Print Circulation Reports

The data will be released immediately on completion of an audit or, if agreed with the publisher, at the latest on the date when all the titles of the audit period have been audited (the beginning of April).

The main audit period is one calendar year and covers the circulation of all issues published during that period. Audits can be conducted for shorter periods, e.g. January—June and July-December. The entire circulation statistics are free for everyone on the website. The main promotional materials are regular customer letters and informative website of Bureau.

Press releases are published as needed, approximately four times a year. They are mainly concerning new circulation (once) and readership figures (twice), and new consumer data (once). The interest towards press releases has been active and positive in all media.

Digital Audits

The Bureau carries out circulation audits of e-papers. The main audit period of both printed titles and e-papers is one calendar year. The e-paper circulation is not included in the circulation of the printed title.

Other Audit Services

The audit services of the Bureau include circulation audits of newspapers, periodicals and e-papers, and audits of fairs and exhibitions.

Publicity

Audited titles may use circulation figures audited by the Finnish Audit Bureau of Circulations (FABC) for their own marketing purposes. The figures for one calendar year or audit period may, however, be compared only with those for corresponding periods. The period to which figures refer must be clearly stated in quoting circulation data.

Media info and the like must always state the percentage composition of the circulation. The percentage circulation composition should be given as, for example, 20,000 (77/20/3) FABC 2009, where 20,000 is the circulation figure, 77 is the percentage of copies sold at the basic rate or at a discount of not more than 50 per cent, 20 is the percentage of copies sold at a discount of over 50 but not more than 85 per cent, is the percentage of member or registered customer copies and 3 is the percentage of approved free copies.

Interesting Developments within the Bureau

Total reach figures for printed titles and their websites were produced in National Readership Survey for the first time concerning the data collected in 2008 and the method was further developed 2009.

The circulation database search on the website of the Bureau was further developed by adding in new functions.

Plans and Opportunities for the Future

Further development of audit services of digital publications.

Hong Kong Audit Bureau of Circulations Limited

Country

The Government – Hong Kong Special Administrative Region Government

Contact

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Established

January 1998

Member Since

January 1998

Staff

3

Chairman

Jeremy Ford

Executive Director/CEO

Pauline Yu

Membership

As at 30 December 2009–41

Personnel Changes

Vice Chairman

Melanie Lo

The Association of Accredited Advertising Agencies of Hong Kong

Committee Members

- Celine Ho, David Yeung, Vincent Cheung
The Hong Kong Advertisers Association
- Pauline Ng, Ray Wong
The Association of Accredited Advertising Agencies of Hong Kong
- Philip Owens
The Society of Publishers in Asia (The Wall Street Journal Asia)
- Terence Tung
The Society of Publishers in Asia (One Media Group)
- Gladys Cheng
Publisher (Sing Tao News Corporation Ltd.–Headline Daily)
- Alex Ho
Publisher (South China Morning Post)
- Ricky Lo
Publisher (AM730)

Objectives

- 1 To encourage a higher standard of circulation data management within and outside its membership, thereby upholding the integrity of advertisers, media buyers and media owners.
- 2 To ensure that the claims of circulation figures are accurate, objective and comparable.

Economic Situation

	2005	2006	2007	2008	2009
Population, Mid-year (million)	6.81	6.85	6.92	6.98	7.00
Gross Domestic Products (US\$ billion)	177.3	189.2	207.2	215.1	210.6
Real GDP Growth (%)	+7.1	+7.0	+6.4	+2.2	-2.8
GDP Per Capita (US\$)	26,000	27,600	29,910	30,833	30,064
Inflation (% Change in Composite CPI)	+1.0	+2.0	+2.0	+1.8	+1.9
Unemployment Rate (%)	5.6	4.8	4	3.5	5.2

Source: Demographic Statistics Section, Census and Statistics Department

Advertising Expenditure Per Medium

(Hong Kong, dollar, million)

	2002	2003	2004	2005	2006	2007	2008	2009
Press	8,318	7,700	8,899	10,151	11,578	12,539	12,867	10,165
Newspapers	6,612	6,044	6,783	7,427	8,750	9,308	9,352	7,363
Magazines	1,706	1,656	2,116	2,724	2,828	3,231	3,515	2,802
Television	4,457	5,215	6,689	7,441	8,078	8,162	8,484	6,681
Radio	688	628	672	790	835	1,121	1,248	989
Cinema	24	6	3	2	2	4	4	2
Outdoor	845	719	1,013	1,279	1,694	2,043	2,119	1,955
Internet	78	114	123	139	152	802	853	1,057
TOTAL	14,410	14,382	17,399	19,802	22,339	24,671	25,575	20,849

*Projected advertising expenditure

Source: HK Adex SRG, ZenithOptimedia

Status and Growth of Print Media as Compared to Other Media

The industry faces the continuous pressure of decline in print advertising dollars, which is the traditional business model of most publications; the industry has been creative in tapping media spend with electronic products and trade events.

As of May 31, 2010, the Hong Kong registered press included 47 daily newspapers and 651 periodicals.

Source: 2008/09 World Association of Newspapers published by WAN/TELA Hong Kong SAR Government/Hong Kong Audit Bureau of Circulations Limited

Finances

Publisher members pay annual membership fees based on their number of titles. 2As (Advertisers), 4As (Advertising Agencies) and SOPA pay an annual group membership fee on behalf of their members. HKABC receives Audit Fees for each circulation audit of the publication. Majority of the income is derived from membership fee.

Services Provided

HKABC conducts personalized briefing sessions and presentation to its potential Members. Together with the Audit Rules Subcommittee, it examines and updates HKABC audit rules to cater for market's needs. All enquiries from existing members are directed to and addressed by staff of the Bureau.

Print Circulation Reports

- 1 Frequency of Reports—quarterly, half-yearly and yearly.
- 2 Reports are available to the public through the website at no cost.
- 3 Regular e-newsletter broadcasting latest circulation figures to members of the HKABC.

Digital Audits

Frequency of Reports—quarterly, half-yearly and yearly.

Other Audit Services

Ad hoc audits—available to HKABC members only.*

—

**please contact HKABC Limited for details*

Major Changes to By-Laws, Rules

- 1 Modification of rules governing Electronic Editions.
- 2 Modification of By-laws.

Special Issues/Challenges

In view of the growing number of electronic publications and demand for circulation audits for such titles, audit rules in the relevant sections were examined and amended after consultation with the industry.

Publicity

Members may publicize their circulation figures in accordance with the HKABC by laws

Interesting Developments within the Bureau

- 1 During the year, HKABC proposed to formulate a new category of circulation audit-trade and membership, which is currently under review.
- 2 Members may report non-opted in electronic editions in the HKABC audit certificate.

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**For details, please check with HKABC Limited*

Other Relevant Activities

- 1 The Bureau appointed a new auditing firm, K P Law & Company in 2009.
- 2 Introduction of new fee structure to HKABC members.

Plans and Opportunities for the Future

Whilst recognizing the need for competition among the players, HKABC feels strongly that there are areas which require joint industry efforts in promoting circulation audits as a whole, e.g. educating newcomers to the industry, more aggressive marketing activities, and vigilant use of online power to increase market shares amongst competing media. Future plans include:

- 1 Feasibility study on additional services e.g. profile and demographic audits for members.
- 2 Inclusion of online circulations and subscription.
- 3 Continuing development of new working processes for auditing with the emergence of new free dailies.

Audit Bureau Of Circulations

Country

India occupies 2.4% of the world's land area and supports over 17.5% of the world's population. 72.2% of the population lives in about 638,000 villages and the remaining 27.8% lives in more than 5,100 towns and over 380 urban agglomerations.

Population

- Growth rate: 1.548% (2009 est)
- Birth rate: 22.22 births/1,000 population (2009 est)
- Death rate: 6.4 deaths/1,000 population (2009 est)
- Life expectancy: 69.89 years (2009 est)
 - Male: 67.46 years (2009 est)
 - Female: 72.61 years (2009 est)
- Fertility rate: 2.72 children born/ woman (NFHS-3, 2008)
- Age structure (2009 est)

YEARS	%	MALE	FEMALE
0–14	31.1	190,075,426	172,799,553
15–64	63.6	381,446,079	359,802,209
65–over	5.3	29,364,920	32,591,030
- Sex ratio
 - At birth: 1.12 (male(s)/female (2009)
 - Under 15: 1.10 (male(s)/female (2009)
 - 15–64 years: 1.06 (male(s)/female (2009)
 - 65 years: 0.90 (male(s)/female (2009)

Official Language

Hindi, English

Contacts

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W www.auditbureau.org

Founder Member

International Federation of Audit Bureaux of Circulations

Established

1948

Member Since

1963

Staff

- 1 Secretary General
- 1 Sr. Accounts Officer
- 8 General Assistant & Support Staff

Chairman

Subroto Chattopadhyay (advertiser representative)
The Peninsula Foundation

Executive Director/CEO

Hormuzd Masani
Secretary General

Membership

Bureau at present has over 660 Publisher Members whose total circulation constitutes a very high percentage of total circulation of all periodicals in the country.

Break up of Bureau membership is as under:

Advertisers	153
Advertising Agencies	62
News Agencies, Organisations, etc.	24
	239
Publishers	
▪ Daily Newspapers	536
▪ Weekly Newspapers	53
▪ Magazines	78
	667
TOTAL	906

Objectives

- To secure accurate circulation figures and data relating to all periodicals and media that sell advertising space and in regard to such publications to obtain information as to area of distribution and fix standard forms and methods for ascertaining the net sales figures and generally all information that will be of assistance to advertisers in estimating the value of any publication for advertising purposes and to record such information and circulate it to members of this Association and generally to establish a bureau of information in regard to all publications and the circulation of them for the benefit of members of this Association such service to be known as the "A.B.C." service or by such other name or description as the Council of this Association may determine from time to time.
- To collect and distribute amongst members of this Association information relating to all forms and methods of advertising.

Economic Situation Relevant to Marketing and Publishing Activities

India's growth story has been a phenomenal success for the past many years. However, due to the earlier global down turn and rise in oil prices, it is expected that India's growth story would also be affected and the growth rate would slow down in the immediate future. However that does not stop international titles from being launched in India. Many international publishing houses are looking for tie ups with existing Indian print media houses to launch their various international titles.

FDI is permitted upto 26% in newspapers. However both strategic investors and private equity funds are very keen to pump in more money into the Indian print media.

Status and Growth of Print Media as Compared to Other Media

Overall trends

Indian media and advertising industry clocked a total size of \$4148.89 million compared with 2008 where the industry size was pegged at \$4603.78 million, this is a dramatic drop of full 10 percentage points. The fall is even more dramatic when we consider the fact that industry grew by an average rate of 15-18 per cent over the five year period 2004–2008.

Print Media

Print media was the worst hit in 2009. The medium lost, a massive \$444.44 million of ad revenues! This meant that the growth of print media in 2009 was negative by a massive 21 per cent, when compared with 2008. Fighting to retain their market share, all leading print titles dropped their ad-rates, opened upto 'innovation' like never before. Some smart players increased their cover prices, and the focus was solely on managing bottom lines with cost cuts and improving efficiencies. The sector saw a slew of cost reduction measures like reduction in no. of pages, salary freeze/cuts, launches getting deferred and so on.

Television Media

Television media registered a total ad revenue of \$1887.11 million, a two per cent growth over 2008. Revenues lost by press was television's gain. It became largest media platform at 45.5 percent share of total ad pie, ahead of 42 per cent share registered by press.

Internet Media

Against the total revenue of \$80.67 million in 2008, it grew to \$100.67 million in 2009. Several reasons like higher measurability and growth in the usage, account for this growth.

Radio

Radio at \$151.33 million in 2009 just about managed to retain its ad size. The industry comprises of print, electronic, radio, internet and outdoor segments. The size of the print segment is about \$3844.44 million, while the radio and internet segments are about \$186.67 million and \$137.78 million respectively.

Print

Indian has more than 600 English dailies and 7,400 Indian language dailies. The demand for regional print media is growing at a faster pace than that of English language print media.

The share of print media in the total advertisement pie fell from 47.9% in calendar year 2007 to 47.4% in the calendar year 2008. Television has maintained its market share at 40.2%. Hindi language newspapers increased their share in total advertisement pie to 27% from 24.4% at the cost of English and some other regional language publications.

Growth rates will increase in 2010 to 10.4% as economic conditions are expected to gradually improve. For the remaining years, the media industry will continue to grow at increasing rates, resulting in the overall compound annual growth rate for the period 2009–2013 of 10.5%.

Print media industry is projected to grow by 5.6% over the period 2009–13, reaching \$4733.33 million in 2013. The relative share of newspaper publishing and magazine publishing are not expected to change significantly and are expected to remain the same at around 87% in favour of newspaper publishing. Magazine publishing is expected to grow at a higher rate of 6.5% as compared with newspaper publishing which is expected to grow at 5.6% from the next 5 years.

Electronic Media

In the electronic media, the total number of channels presently available to viewers in India stands at close to 500. In the electronic media, the highly fragmented viewership has led to an increasing preference for niche channels.

Affiliation

INS—Indian Newspaper Society
AAAI—Advertising Agencies Association of India

Finance

Membership/Subscription Income	63%
Investment Income	31%
Advertising Income	3%
Other Income	3%
TOTAL	100%

Services Provided

Auditing of circulation figures of member publications every six months i.e. January–June and July–December.

Print Circulation Reports

Print circulation reports are released for the six monthly audit period i.e. January–June and July–December. The same are made available to all members of the Bureau in a hard copy as well as regularly updated on the Bureau's website: www.auditbureau.org.

Digital Audits

Bureau does not undertake digital audit.

Other Audit Services

No other audit services provided excepting circulation audits.

Major Changes to By-Laws, Rules

Publisher is permitted to remunerate the distribution trade any amount as trade commission provided the Net Rate at which a newspaper is sold to the distribution trade is more than the value of the newspaper in waste.

Publicity

All publisher members are permitted to use only audited circulation figures as approved by the Bureau in any form of publicity/campaign. Publicity of print order figures or estimated circulation figures are not permissible to be used for any promotion under the Bureau's publicity rules.

CSST (Certificazione Stampa Specializzata e Tecnica)

Established

1986

Member Since

1992 (Affiliated Member)

1998 (Full Member)

Staff

Director and 2 staff people.

Chairman

Armando Garosci

Executive Director/CEO

Cristina Ferrari (Secretary General)

cristina.ferrari@anes.it/anes@anes.it

Membership

191 Printed titles, 8 websites.

Personnel Changes

Fabiola Iannaccone (General Assistant)

Davide Panzeri (Consultant)

Economic Situation Relevant to Marketing and Publishing Activities

A significant decline generated by the global economic crisis and by the decline of advertising investments in print media have engrained on the adhesions of CSST in last year. The Institute is planning a promotion of her activities through the advertising agencies.

Objectives

The promotion of a culture of transparency in the declaration of printing and circulation of publications by publishers to advertising market.

Status and Growth of Print Media as Compared to Other Media

Media as compared to other Media Growing interest and engagement of publishers towards of digital media but they remain critical of capacity to make a profit. The Internet sector is developing faster than prints, with a trend of integration between the 2 media.

Finances (Revenue Profile)

Income is derived entirely from publishers

Services Provided

Print press and websites Auditing Consultancy to member

Print Circulation Reports

Reports released yearly

Digital Audits

Websites Auditing (page view, unique users, visit duration). Frequency: monthly

Major Changes to By-Laws, Rules

- CSST now audits distribution by newsstand.
- Magazines certifying distribution for the first time no longer need to declare the print run in the colophon for the first year.
- More precise rules for bulk copies: we require the list of recipient and receipt of delivery.

Publicity

Our logo is "CSST, a member of IFABC" and members are allowed to print in the magazine and advertising but strictly linked to the yearly certification.

All complaints are discussed within the Technical Committee and there are different sanctions including the exclusion from auditing.

Interesting Developments within the Bureau

Armando Garosci is the new Chairman

Plans and Opportunities for the Future

We are planning on launching auditing of newsletter circulation and digital magazines circulation.

Japan Audit Bureau of Circulations

Established

October 28, 1952

Member Since

1963 (Founding Member)

Staff

24 employees

Chairman

Kiyoshi Morita, Counselor DAIICHI SANKYO Co., Ltd.

Managing Director

Akihisa Okamoto

Objectives

To contribute to the fair advertising transaction among advertisers, advertising agencies and publishers by issuing audited circulation data

Membership

31 March 2010

Newspaper Publishers	62
Magazine Publishers	51
Business and Technical Publication Publishers	12
Free Publications Publishers	61
Advertisers	225
Advertising Agencies	197
Associate Members	40
TOTAL	648

Personnel Changes

Mr. Morita has replaced Mr. Narita as chairman at 16th June 2010.

Finances (Revenue Profile)

The income of the Bureau is derived from:

Newspaper Publishers	40.5%
Magazine Publishers	8.9%
Business and Technical Publication Publishers	1.3%
Free Publications Publishers	8.2%
Advertisers	5.8%
Advertising Agencies	30.6%
Associate Members	0.2%
Others	4.5%
TOTAL	100.0%

Services Provided

Print Audits, Digital Audits (for magazines and Business and Technical Publications).

Print Circulation Reports

- Publisher's Statement:
 - Newspapers: every month(monthly average), twice a year(average during half a year).
 - Magazines, Business and Technical Publications, Free Publications: twice a year.
- Auditing Report:
 - Newspapers: twice a year.
 - Magazines, Business and Technical Publications, Free Publications: once a year.

Digital Audits

We audit the digital copies (streaming type) for magazines and Business and Technical Publications.

Frequency: twice a year

Special Issues/Challenges

The appearance of ipad has accelerate the sales of digital copies of magazines. Dentsu has managed "MAGASTORE" which is sales application for digital copies of magazines for ipad/iphone, they increased those sales with it to ten times compared with last year. But the magazines which are sold at MAGASTORE have no advertisement. We will discuss whether we audit those magazines at "The council of digital audits" which consists of 8 magazine publisher's members and us.

Publicity

We make an advertisement for publishers' PR every year. Publishers can use it in their publication. It says ABC audit their circulation, so their circulation is trust worthy.

Other Relevant Activities

For our members, we hold the lecture meetings about business method three times a year, inviting a specialist as a lecturer.

Plans and Opportunities for the Future

We have a plan to offer an interactive audit service in the future.

KABC (Korea Audit Bureau Of Circulations)

Country

South Korea has a population of 49.7 million (2009). Administratively, the Republic of Korea consists of nine provinces; capital Seoul; six metropolitan cities of Busan, Daegu, Incheon, Gwangju, Daejeon, and Ulsan; and additional 77 cities; and 88 counties.

Contacts

9F Korea Advertising Culture Bldg, 7-11 Shincheon-Dong, Songpa-Gu, Seoul 138-921, Korea
T 82-2-783-4983
F 82-2-782-5889
E kabc@kabc.or.kr
W www.kabc.or.kr

Established

May 31, 1989

Member Since

1990 (Affiliated Member), 1996 (Full Member)

Staff

26 employees, including 21 auditors

Chairman

Min, Pyung Joon

Vice Chairman

Kim, Young-il

Membership

As at 21 June, 2010

Advertisers	11
Advertising Agencies	14
Publishers	891
▪ Daily Newspapers	153
▪ Weekly Newspapers	387
▪ Magazines	141
▪ Business Publications	197
▪ Free papers	12
▪ Etc.	1
Websites	10
Associate Members	6
TOTAL	932

Objectives

To contribute to the development of scientific and rational advertising and media management through the following activities:

- 1 Audit the data of circulation, distribution, audience and other related matters for media plan of advertising media like newspaper, magazine, and electronic media including interactive media, etc. by standard procedures.
- 2 Conduct research and survey on the matters of common interest of advertising and media industry.

Status and Growth of Print Media as Compared to Other Media

Advertising Expenditure by Media

In Hundred million KRW (1,200 KRW amount to 1 US\$)

	2009	2008	2007	RATE OF GROWTH	THE COMPONENT RATIO
TV	16,709	18,997	21,076	-12.0%	43.6%
Radio	2,231	2,769	2,807	-19.5%	5.8%
Newspaper	15,007	16,581	17,801	-9.5%	39.1%
Magazine	4,388	4,804	4,841	-8.7%	11.4%
TOTAL	38,335	43,151	46,524	-11.2%	100%

*Source: Korea Federation of Advertising Associations

Affiliation

According to the list of periodicals published by the Ministry of Culture, Sports and Tourism, There are 275 dailies, 3,119 weekly newspapers and 4,973 magazines or business publications in Korea as of December 8, 2008 and 165 (60.0%) dailies, 387 (9.2%) weekly newspapers and 339 (6.8%) magazines or business publications out of them are members of KABC.

Finances (Revenue profile)

The income is derived from membership dues and interest of ABC Fund:

Publishers	39.9%
Advertisers	0.6%
Advertising Agencies	1.6%
Others	31.7%
ABC Fund Interest	26.2%
TOTAL	100.0%

Services Provided

Print Audit, Website Audit, ABC Journal Service, Annual Seminar, etc.

Print Circulation Reports

Audit Reports for Newspapers(dailies and weeklies), Magazines & Business Publications, are issued yearly.

Publisher's Statements for Newspapers(dailies and weeklies), Magazines & Business Publications are issued quarterly at the end of March, June, September, December respectively.

These figures are released on the website together with the printed reports.

Reports are released to KABC members and political parties for nothing. The public are able to access the summarized reports on the website.

Digital Audits

KABC does not do auditing or reporting digital copies yet.

Other Audit Services

Web site audit. Page Views, Visits, Unique Visitors (Unique Users) are reported in the certification and the definitions of them are consistent with IFABC definitions.

There is no urgent need for the web certification till now and that's why most sites would not participate in audit.

Major Changes to By-Laws, Rules

The changes for paid circulation audit:

- For subscriptions; min 50% of cover price must be paid by the final recipient.
- For retail sales; we verify average number of copies sold at the fixed price excluding returned copies by newsstand.
- For others; 50% of cover price must be paid by final recipient.

Special Issues/Challenges

The government which annually spends over \$100 million advertising expenditures for print media has drawn up a new policy for efficient spending for advertisement. Newspapers and Magazines should be audited and announce their circulations from January 1st, 2010 to get government advertisement according to the revised measure.

Publicity

It is not compulsory for members to include "Member of ABC" in their publications, website etc. They have option to carry that phrase in their publications etc.

Members are allowed to say that they are member of KABC and their circulations are certified by KABC.

The chairman of KABC warns the member who violates the rules concerning publicity or invades other members' right, and urges not to do anymore in case of light breach.

If the breach seems to be serious, the chairman reports to the Board of Directors and the Board takes necessary action.

Interesting Developments within the Bureau

We will make every effort to study Readership Profile Report in 2010. Also Korea ABC is interested in Mobile newspaper circulation such as the i-phone application to read a newspaper or magazine. We are considering the audit report to combine print, website, mobile and digital circulation which could show expended readership as the influential media.

ABC Malaysia

Established
1975

Member Since
1978

Chairman
Margaret Lim
Secretary
J Matthews

Membership

NEWSPAPERS	National Dailies	National Sundays	Regional
	12 (Paid) & 1 (Free)	6 (Paid)	14
MAGAZINES	(Consumer/Trade/Specialist)		
	45		

Objectives

- To obtain accurate circulation figures for all printed media that sell advertising space and to obtain information as to the areas of distribution.
- To establish standard formats and methods for ascertaining the net sales figures for all printed media.
- To obtain accurate information of other media and to establish a standard method for obtaining this information.

Economic Situation Relevant to Marketing and Publishing Activities

The advertising market for Malaysia in 2009 recorded a 7% growth for the year despite a 1% contraction in the first half of the year. And 2010 continues to be one of recovery momentum gaining traction. With the World Cup, 2010 recorded a 22% increase for the first half of the year.

- Unemployment (2010): 3.3%
- Inflation Rate (2010): 1.5%
- Gross Domestic Product (2010): RM 713,671 million (5% growth YoY)

Status and Growth of Print Media as Compared to Other Media

Newspaper continues to attract the bulk of adex (51%), followed by free-to-air TV (37%). The medium has historically held a lion share of total adex of over 60%. The balance is changing over the longer term, with TV gaining share at the expense of newspaper. Circulation declined 3% in July 2008 to June 2009 YoY to reach 2,481,878 copies. A drop in circulation of key English newspapers, older Bahasa language newspapers and the non-reporting of two titles contributed to the decline. The internet is the fastest growing medium, registering 54% growth as at 1H 2010 YoY.

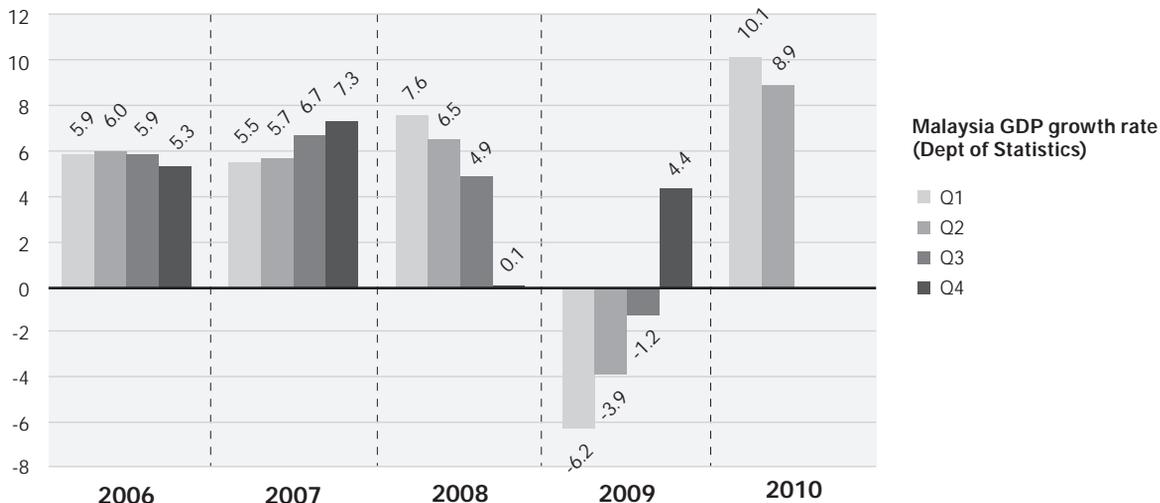
Total advertising by media (in RM mil)

MEDIA	2008	%	2009	%	CHANGE%
Television	2,161.2	35	2,446.4	37	13
Radio	291.3	5	361.8	5	24
Newspapers	3,320.8	54	3,407.3	52	3
Magazines	156.1	3	138.9	2	-11
Outdoor	95.9	2	112.3	2	17
In-store media	73.9	1	85.9	1	16
Cinema	27.4	*	22.5	*	-18
Internet	33.3	*	40.4	1	22
TOTAL	6,160.0		6,615.5		12

Total advertising by media (in RM mil)

MEDIA	1ST HALF 2009	%	1ST HALF 2010	%	CHANGE %
Television	1,001.6	35	1,296.4	37	29
Pay TV*	0	0	850.3	—	—
Radio	155.5	5	184.1	5	18
Newspapers	1,558.7	54	1,836.0	52	18
Magazines	64.3	2	68.3	2	6
Outdoor	55.2	2	59.7	2	8
In-store media	40.8	1	51.8	1	27
Cinema	10.4	0	9.6	1	-8
Internet	16.7	1	—	—	—
TOTAL	2,903.1		3,531.8		22

*Pay TV adex available from 2010. Excluded in YoY comparison.
Source: Nielsen Media Research



Affiliation

Malaysian Advertisers Association, Association of Accredited Advertising Agents, Malaysia, Malaysian Newspaper Publishers Association and the Media Specialists Association.

Finances (Revenue Profile)

Membership	50%
Other	50%

Services Provided

Certifying print circulations and distribution across paid and free national and regional newspapers, consumer, trade and specialist magazines.

Print Circulation Reports

- National Newspapers: Six Monthly.
- Consumer, Trade: Six Monthly (Optional).
- Specialist Magazines: Annual (Compulsory).

Special Issues/Challenges

The continued reluctance of magazine publishers to join the Bureau has stirred comments about the need to be a member as these non members continued to receive substantial advertising revenue from advertisers. ABC's hallmark of accountability and

transparency seemed to be ignored. The Board embarked on a number of ways to reinforce the need for independently audited circulation data and other data. The Board even considered the possibility of a civil class action against publications which were using claimed/print run figures. Fresh talks have started with advertisers and media specialists to ask them to be persistent in their demand for independently verified circulation data. The Board has again started exploring the possibility of measuring digital media. This will be a key focus area and an ABC Interaktif Committee has been established. ABC Malaysia would have to look at alternate means of raising funds to fund the verification processes for other types of media—trade exhibitions, cinema, out of home etc. A revamp Committee has been set up to look at a new business model for ABC as the revenue from subscriptions do not meet the expenditure of the Bureau.

Publicity

A number of media conferences were held to keep the pressure on un-audited titles. The threat of the civil class action was carried in a number of media around the world.

Plans and Opportunities for the Future

There are many opportunities for the Bureau to expand its services into. But the limited resources do not provide the avenue as yet. The possibility of online metrics and the growing membership from magazines would perhaps enable ABC to achieve its objectives.

HOI, Institute for Media Auditing

Contacts

Postbox 314, 1180 AH Amstelveen
T +31 20 6613626
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E info@hoi-online.nl
W www.hoi-online.nl

Established

March 1998

Member Since

1999

Staff

3

Chairman

Peter Neijens (University of Amsterdam)

Executive Director

George Bohlander
gc.bohlander@hoi-online.nl

Membership/Affiliation

Every print title distributed in Holland can become a member. Titles from publishers from official publisher associations are obligated to become HOI member. If a title wants to be a member an audit report is necessary of the latest quarter. 696 titles (252 consumer magazines, 402 business magazines, 34 newspapers and 8 E-papers) with more than 200 publishers are members of HOI at Q1 2010.

Total circulation: 43 million average circulation (4,8 mio newspapers, 33,3 mio consumer magazines, 4,8 mio business magazines and 83.000 E-papers) 100% of newspapers are members = 100% advertising expenditures in newspapers. 70% of all magazines are members = 90% advertising expenditures in magazines.

Every quarter a publisher's statement will be published of every title and every year an audit report will be available. The audit control will be executed by an external accountant and will be directly paid by the publisher.

Objectives

Providing the Dutch market with reliable advertising distribution figures (including circulation) through gathering, detailing, control and publication of these figures.

Economic situation

In 2009 the gross domestic product was -4% (highest decrease since 1930). A small growth of +1.5% is expected in 2010. Inflation in 2009 (1.2%) and in 2010 (est. 1.3%) is limited. The net mediabillings in 2009 went down -12.4%! Especially print -20.4%.

Net mediabillings 2008 versus 2009 (x 1 million euro)

	2008	2009	%
Dailies	815	616	-24,4%
Free papers	634	568	-10,4%
Consumer magazines	348	259	-25,6%
Business magazines	408	313	-23,3%
TOTAL PRINT MEDIA	2,205	1,756	-20,4%
TV	855	781	-8,7%
Radio	261	220	-15,7%
Cinema	5	5	0,0%
TOTAL AV MEDIA	1,121	1,006	-10,3%
Internet	801	815	1,7%
Outdoor	164	148	-9,8%
Sponsoring	930	850	-8,6%
Exhibitions	398	348	-12,6%
TOTAL	5619	4,923	-12,4%

Source: Nielsen Nett Billings

Policy Guidance

HOI is an independent organization on a non-profit basis. HOI is based on joint industry committee (JIC) with advertisers, media-agencies and publishers.

The board is composed on an equivalent basis of advertisers and media-agencies (5) versus the publishers (5), respectively members of the BVA Association of Dutch Advertisers and PMA the Association of Media Agencies versus the publishers the Dutch Publishers Union (NUV) and the National Association of Daily Newspapers (NDP). An independent person as chairman completes the Board of Directors as an outside expert.

Board 11 members:

- 3 advertisers (BVA)
- 2 media agencies (PMA)
- 2 newspapers (NUV/NDP)
- 2 consumer magazines (NUV/GPT)
- 1 business press (NUV/UVW)
- 1 independent expert (chairman)

The board is responsible for the policy and all decisions.

HOI is also working with an advisory committee.

Experts from publishers, advertisers and media-agencies. Total 10 members. They are developing definitions and rules and are preparing proposals for the board.

Finances

A new title is paying once an entreefee (€695) and on an annual basis a membership fee based on the average circulation (scale from € 275 - € 1330). Subscription on the HOI reports € 98 per year including advanced online analyser. Basic online analyser is free of charge. Auditcosts are not included.

Services Provided

Print circulation and E-papers (quarterly publishers statement and a yearly audit report).

Print Circulation Reports

- **Internet:** free of charge for total market, All the detailed information of the circulation split per title. You can have selections on: quarters/years, titles, publisher and sector of titles (for instance computer magazines) and of course on all the specific circulation categories. In 2009 we have introduced an advanced online analyser.
- **Quarterly reports:** In these publications the "core" figures of all the titles of a quarter and the same quarter from last year are published.
- **Yearly report:** all detailed figures on every circulation level of all the audited titles are published. Publication on website and in print reports.

Print Audits

The audit for print and E-papers will be executed by an external auditor once a year and if a title wants to become a member. It will be directly paid by the publisher. HOI is comparing the weighted average of the publisher's statements of the 4 quarters with the annual audit report. If there is a difference of 2% and more than 200 copies HOI will publish the differences and will check the reasons for the differences. HOI will review every year max. 5% of all the audited titles (selection done by HOI). This review is carried out by an (other) external accountant. In 2009 auditing reports have to be sent via HOI-online.

Digital Audits

HOI is currently not auditing websites but will do an audit proposal for the STIR Tender online audience measurement planning 2011–2015.

Other Audit Services

After the successful launch of the Ipad HOI is revision the E-paper definitions and preparing a definition and auditing rules for digital editions for new platforms like e-tablets, e-readers and mobile.

Changes By-Laws

Changes in 2010:

- Single copy sales via internet
- Multiple bulksubscriptions for E-papers

Special Issues/Challenges

Discussion new definitions for digital publications.

Publicity

HOI is running every year advertising campaigns. Target-audience: advertisers and media-agencies. Objective: spend your mediabudget only in HOI titles (pay-off: HOI, The Hard Figures). In 2009-2010 a testimonial campaign with well known media and advertising people.

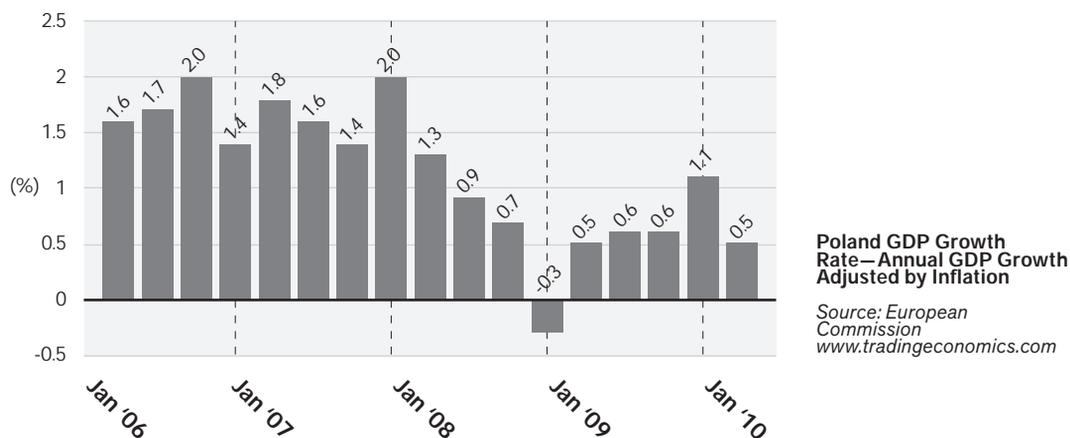
Plans and Opportunities for the Future

- Internet Auditing proposal for STIR Tender online audience measurement.
- Definition and auditing rules for digital editions for new platforms like e-tablets, e-readers and mobile.
- Audits for Door-to-Door titles.

Związek Kontroli Dystrybucji Prasy (ABC Poland)

Economic Situation (2010)

Unemployment	11,9%
Inflation rate	2,2%
Gross Domestic Product (\$)	528 billion



Established

1994

Member Since

1996

Staff

6

Chairman

Piotr Ludwicki (Murator SA)

Executive Director/CEO/Managing Director

Iwona Szczepańska

Membership

MEMBERS	2008	2009	JUNE 2010
Publishers	214	195	198
Advertising agencies	20	20	20
Advertisers and others	32	33	35
TOTAL	266	248	253

TITLES	2008	2009	JUNE 2010
Dailies	58	46	46
Magazines	454	441	414
TOTAL	512	487	460

Objectives

- promoting the values of business integrity;
- eradicating unfair competition by establishing areas of cooperation and understanding among Members of ZKDP;

- disseminating accurate circulation and distribution data, including distribution by areas and forms of distribution; and
- disseminating accurate information about press market research (including readership researches).

Status and Growth of Print Media as Compared to Other Media

Total advertising by media (in PLN)

MEDIA	2008	%	2009	%	CHANGE
Television	11,075,071,742	56,94	12,069,611,572	60,6	994,539,830
Radio	2,083,596,990	10,71	2,045,096,708	10,3	-38,500,282
Newspapers	2,020,069,296	10,39	1,773,703,619	8,9	-246,365,677
Magazines	2,620,748,014	13,47	2,332,935,416	11,7	-287,812,598
Outdoor	1,235,378,746	6,35	1,229,508,066	6,2	-5,870,680
Cinema	416,928,821	2,14	470,718,778	2,4	53,789,957
Internet*	1,170,000,000	6,0	1,400,000,000	7,0	230,000,000
TOTAL	19,451,793,609		19,921,574,159		469,780,550

*estimates based on IAB (real investments or AdStandard - only display ads)

Total advertising by media (in PLN)

MEDIA	1ST HALF 2009	%	1ST HALF 2010	%	CHANGE
Television	5,579,341,754	59,5	6,783,757,611	65,8	1,204,415,857
Radio	976,529,361	10,4	994,025,449	9,6	17,496,088
Newspapers	853,497,836	9,1	764,187,396	7,4	-89,310,440
Magazines	1,126,244,091	12,0	1,068,873,626	10,4	-57,370,465
Outdoor	641,701,125	6,8	483,147,255	4,7	-158,553,870
Cinema	197,814,419	2,1	222,921,477	2,2	25,107,058
Internet**	658,000,000	7,0	-	-	-
TOTAL	9,375,128,586		10,316,912,814		941,784,228

**estimates based on IAB (real investments) - including display ads as well as SEM & e-mail marketing

Source: Media Direction on Expert Monitor (2008–2010), AdStandard (2009), IAB (2008–2010).

Finances (Revenue Profile)

ZKDP is 100% financed from membership fees.

Services Provided

- Print audits
- Digital editions audits
- Readerships surveys - provided by the company organized by ZKDP: Polish Readership Surveys sp. z o.o. (Polskie Badania Czytelnictwa sp. z o.o.)

Print Circulation Reports

- Frequency of Reports: once a month.
- Each publisher-member of ZKDP once a month declares in a standardised report form the circulation and distribution of the audited publication. These statements are prepared by publishers with the use of software - Teleskop online.
- The bulletins with data from the publishers statements (separately for each group of frequency) are published monthly on the website (Teleskop online).
- All data are accessible for ZKDP members. The chosen (basic) data are published on ZKDP website – accessible free of charge.

Digital Audits

Digital editions; the frequency of reporting the same as for print.

Major Changes to By-Laws, Rules

New Audit Rules were adopted in January and June 2009 (new definition of paid/unpaid, subscription, new publicity rules - use of ABC data and comparisons, initial audit rules and free e-editions audits).

The change of e-editions subscription audit rules (effective with January 2011) – in process.

Special Issues/Challenges

- Cooperation with PBI (Polish Internet Surveys) and PBC (Polish Readership Surveys) to distribute the circulation, readership and internet traffic data together.
- Cooperation with the new Association of Advertisers.

Publicity

- What can members say: the publicity rules are described in art. 22 & 23 of the Audit Rules (http://www.zkdp.pl/download/ZKDP_ABC_Poland_Audit_Rules.pdf).
- Campaigns undertaken by the bureau: none.

Interesting Developments within the Bureau

- In March 2010 the new version of Teleskop (the online electronic system of collecting, delivering and analysing publisher's reports) was introduced.
- The cooperation with PBI (Polish Internet Surveys) and PBC (Polish Readership Surveys) to distribute the circulation, readership and website traffic data together.

Other Relevant Activities

- The Bureau launched the marketing workshops dedicated to advertisers to promote the value of press as an advertising medium.
- The Bureau regularly organizes training sessions for members and auditors.
- ZKDP publishes newsletters.
- ZKDP assist in organized by the universities discussions and panels.
- In cooperation with IWP (the Polish Chamber of Press Publishers):
 - we continue the promotion of press as an advertising medium, initiated in 2003;
 - we sponsor the conferences and workshops (also organized in Poland by FIPP, IPI, INMA).

Plans and Opportunities for the Future

- To create an interactive portal about the press market (planned for September 2010).
- Academy of the press knowledge (addressed to media planners) will start in October 2010.
- Cooperation with INMA (ZKDP is the partner to the session on "Innovations in Advertising" and the co-organizer of a Competition of Non-Standard Advertising Offers during the European conference (September 30th-October 1st, 2010, Krakow, Poland).
- To form "Tablet Task Force" (a group comprised of publishing, advertising and interactive industry executives) in order to support a variety of rich new advertising opportunities for the emerging technologies of tablets and e-readers.

BRAT (Romanian Audit Bureau of Circulations)

Established

April 1998

Member Since

June 1999

Staff

11

Chairman

Silviu Ispas

Executive Director/CEO

Arina Ureche

Membership

Total number of members: 226

- 5 Advertisers
- 23 Advertising Agencies
- 7 Advertising Sale Houses
- 52 Web editors
- 138 Publishers
- 1 press distributors

Personnel Changes

We hired a person to control the print run for the audited titles.

Objectives

- To provide the Romanian Market with the standards for independent verification of the circulation figures for various media products.
- To establish standards and methodologies for the verification of the performance indicators for various media products.
- To support the marketing activity of the members by providing independent, accurate and control data about various media products.

Number of titles audited: 311

Number of websites measured: 320

Finances (Revenue Profile)

The association is a non for profit company.

Services Provided

- Audit of Circulation
- National Readership Survey (SNA)
- Internet Traffic and Audience Measurement (SATI)

Publisher's Statements

Information supplied by publishers (under BRAT supervision) and issued quarterly. Figures subject to audit.

Audit Certificates

Information based on auditor findings and issued semiannually, except for the annual publications.

Audit Certificates Catalogue

The collection of all Audit Certificates issued by BRAT for a year which is published annually.

Digital Audits

Same as for the print titles

Major Changes to By-Laws, Rules

- We changed the standard audit period from a semester to one year.
- We publish the quarterly statements simultaneously for all publications at fixed dates.

Publicity

- Advertising campaign "BRAT gives value to advertising" to promote the use of audited publications and web sites measured in SATI.
- The purpose of the campaign was to increase the investment percentage in audited print media and measured internet.
- The campaign has undergone both in print media and online for a period of almost one year, and had the support of all the members of our association.

Plans and Opportunities for the Future

Develop a methodology for monitoring the revenues in print and internet advertising.

Audit Bureaux of Circulations Serbia

Established

2006

Member Since

2008

Staff

5

Chairman

Branislav Nov i

Executive Director/CEO

Milan Kova evi

Objectives

Supporting establishment and long-term continuance of sustainable and fair-to-all business climate for media business in Serbia.

Membership

At the moment, ABC Serbia audits 33 titles:

- 6 daily newspapers
- 7 weekly titles
- 2 bi-weeklies
- 17 monthly
- 1 bi-monthly title.

Personnel Changes

Number of employees is almost doubled during Q1 2010 (from two to five staff members).

Economic Situation Relevant to Marketing and Publishing Activities

Due to global economy slowdown, marketing budgets fell significantly. Number of media reduced, but still remains quite high, compared to total population and limited cash flow on the market.

Status and Growth of Print Media as Compared to Other Media

Print media growth is heavily handicapped due to low marketing income and reduced circulations. Main reason for advertising income drop is disloyal competition, coming from TV companies, which are dumping advertising prices, continuously breaking advertising law. Authorities are aware and publicly warning about this illegal practice, but doing nothing to stop it and punish offenders.

Web audit started at end February 2010, and involves about 40 websites (number is increasing).

Affiliation

ABC Serbia closely collaborates with Media Association of Serbia.

Finances (Revenue Profile)

Projected revenue for 2010 is 64000 Euros.

39% revenue comes from media buying agencies membership fees, 23% from publishers membership fees, 16% from print audit fees, 15% from advertisers (companies) membership fees, 4% from joint members membership fees, other income includes web membership and web audit fees.

Services Provided

Print audit, Web audit, Advertisers database, Print media catalogue, educational seminars on print and web media markets.

Print Circulation Reports

Electronic reports are available via online application 24/7, published monthly. Print certificates are issued every six months.

Digital Audits

Real-time websites visit measurement, reporting daily.

Publicity

Due to paying special attention to every member needs and education (free in-house education, seminars on print and web media industry), ABC Serbia has very positive image in local media business circles.

Interesting Developments within the Bureau

Web audit system is launched end February 2010, and Advertisers database (CoBa-1) development started about the same time.

Other Relevant Activities

ABC Serbia is providing support for ABC Croatia and ABC Bosnia and Herzegovina founding and development.

Plans and Opportunities for the Future

Further online audit development, including demographics. Readership surveys. Advertisers database growth.

Informacion Y Control De Publicaciones, S.A.

Country

Spain has a population of around 47 million and adopts a Constitutional Monarchy. The President Jose Luis Rodriguez Zapatero (Socialist Party) was reelected in 2008 and has a four-year term.

Established

October 1964

Member Since

1966

Staff

OJD employs 36 people, including 16 printed media and 6 electronic media auditors in 2 offices, Madrid and Barcelona.

Chairman

Angel Durández

Executive Director

Eusebio Serrano (eusebio.serrano@introl.es)

At the General Assembly the company name was changed into INFORMACION Y CONTROL DE PUBLICACIONES and three different divisions were created: OJD (paid publications), OJD www (electronic media) and PGD (free distribution publications)

Membership

Informacion y Control de Publicaciones has 819 members (May 10) in the printed media area and they are distributed as follows:

Daily Newspapers	104
Weekly News Magazines	12
Consumer Magazines	275
Business and Technical Publications	222
Free Publications	31
Freesheets	175
TOTAL	819

Approximately 97% of newspapers, 93% of consumer magazines and 63% of technical and professional publications and 50% of free distribution publications of the country's total publications are audited by the Bureau In the interactive media area the 360 members (May 10) are distributed as follows:

Electronic media area

Automotive	11
Computing and consumption electronic	32
Corporate information	7
Ecommerce	11
Education and employment	7
Entertainment	56
Family and way of life	15
Finance, insurance and investment	11
Multicategories, fashion and home	14
News, information	145
Portals, communities	27
Public administration and NGO	6
Special events	2
Travel	16
TOTAL	360

Personnel Changes

The company named the following people responsible for the different divisions:

Printed media

José Antonio Pérez Alaminos

Electronic media

Manuel Sala

Financial department

Jorge Bettero

Computing department

Alberto Alvarez.

Objectives

- To audit and verify circulation and free distribution of printed and electronic media figures.
- To issue standardized circulation data to benefit advertisers, advertising agencies, publishers and other users.

Economic Situation

Spain is going through a very complicated economic situation not only due to the worldwide financial crisis but also because of the decrease of the most important economic sectors such as construction and services. It has caused an important fall in the consumption and investments in general and the unemployment rate is rising up.

From 2003 to 2007 the advertising investment has increased continuously at about 10% every year. In 2008 there has been a decrease in this investment up to 11.1%. One of the most affected sectors by this situation is the media market, specially printed media such as newspaper, magazines and freesheets, having falls up to 30% in 2009. The only media that has increased their income (up to 26% in 2008) are the online

Affiliation

Printed media	80.89%
Electronic media	16.14%
Advertisers and Advertising Agencies	2.97%
TOTAL	100.00%

Finances

Revenue is derived from two main sources:

Advertisers	11
Advertising Agencies	24
Publishers	62
TOTAL	97

Advertising agencies and advertisers pay an annual rate; publishers pay an audit fee scaled according to circulation average.

Services Provided

Printed and electronic media audits and other related services.

Print Circulation Reports

On line Publisher's Statements are received within the Bureau every six months by daily newspapers and publications with total circulation over 25.000 copies (ending June and December) and once a year by other publications.

The Statement contains:

- general data
- number of issues
- total of printed pages
- paper newsprint consumption
- press run
- subscriptions (individuals & bulk)
- bulk sales
- complimentary copies
- paid circulation
- unpaid circulation
- total net circulation
- geographical breakdown
- net sales

- In the case of business and professional press, the analysis of recipients can also be included under certain circumstances on an optional basis, under Qualified Circulation Certificates.
- Audit Certificates are issued by the Bureau at least twice a year ending June and December for each publication after OJD auditors have audited the figures under the Publisher's Statements.

In addition to the Regular Audit Certificate an Attached Audit Certificate is published by the Bureau since 1998 containing Daily Newspapers Geographical Edition Figures relating to a specific Advertising Tariff.

- Consumer Publications Audit Certificate. Consumer magazines with average circulation over 25.000 copies are obliged to be audited every six months.

The figures are reported in the OJD certificates with a yearly circulation average including the precedent six months figures.

- Special Certificate of Free Distribution Publications including the distribution of single unaddressed copies delivered through letter boxes, bulk copies picking up and redistribution are also included.
- Monthly Circulation figures reports: In January 2004, the Board of Directors approved a new service called Monthly Circulation Figures Reports for Daily Newspapers and Consumer Magazines.

The newspapers publishers must provide the previous month data through members section of our web before the 15 th every month, the total printed and net circulation copies, split by different channels geographically. These figures are revised provisionally by the auditors and ten days later are reported in our web site section title by title (including twelve months). The information declared by the publishers and provisionally revised are audited every six months.

In the case of consumer magazines, the gap period of reporting figures under monthly basis consists of three months in order to get the unsold copies properly collected.

- Newsletter. As soon as the circulation figures are approved, a newsletter containing the press run and net circulation average is immediately released.
- A monthly Bulletin in pdf format is published by the Bureau. It contains a copy of Audit Certificates issued within the month. This information is copyrighted and may not be published without permission of the Bureau and the publisher concerned. The Bulletin is sent free of charge to all audited media and is sold on a subscription basis to nonmembers.

This Bulletin also includes the latest average circulation figures of every publication affiliated with the Bureau and the list of new publications members.

Circulation figures are available in our web site (<http://www.introl.es>)

Electronic Media Audit Service

Since May 1997, we have been auditing the traffic at Web sites. The results are reported in the Audit Certificates including total visits, pages impressions, unique users as well as other useful information (daily and hourly traffic).

In 2008 we set up a new measurement system through external software provided by the measurer. All the audited sites must include a tag (java script code) in all the pages or sections declared. Traffic is stored in our collector on line, in order to do all the audit proofs and certify under monthly basis. The certificate includes visits, unique users, page impression and visit duration.

Major Changes to By-Laws, Rules

With the aim of auditing and certifying the replicas digital copies, we amend the technical rules. The digital copies must be reported separately.

Special Issues/Challenges

Nowadays, the circulation figures in general are declining in our country and as a consequence our income is decreasing since we invoice according to the circulation scale.

In order to balance the resource we are implementing new services related to the readership survey for the local publications and building up a big data bank.

Publicity

Publisher members are allowed to make publicity of their audited figures included in the Certificate and compare with other competitors under homogeneous basis.

Introl has carried out an extensive communication campaign among the Central Media buyers which have been conducted by a specialised consulting company.

Interesting Developments within the Bureau

Along 2005 we built a big Data Bank called M.A.S (Media Analyse System) which is a very useful tool for publishers and Media Buyers that include the main figures (printed, subscription, net sales, etc.) of all publications audited by the bureau since the beginning. The software is sold separately from other services, it is installed in the customer server and every month is updated with the new certificate figures.

Plans and Opportunities for the Future

Fortunately Introl OJD is very well recognised in the market as a common reference. Our objective is and will continue in the future the implementation of our procedures providing the best tools for our clients.

Tidningsstatistik AB SE-114 78 Stockholm, Sweden

Contacts

Vasagatan 11
T + 46 (0) 8-507 424 00
F + 46 (0)8-507 424 01
W www.ts.se

Established

1942

Member Since

1963 (Founding Member)

Staff

The staff totals approximately 19. All members of the staff are concerned primarily with media auditing and information.

Chairman

Yvonne Pernodd

Executive Director/CEO

Magnus Paulsson

Economic Situation Relevant to Marketing and Publishing Activities

- Unemployment: 8.8% (June 2010)
The Activity Index measures the activity in the Swedish economy, which increased in December 2009. The trend increased 0.1 percent compared to November, which corresponds to an annual rate of 1.1 percent.
- Consumer prices: 1.2% (May 2010 compared with May 2009)
- GDP: +1.4% (Q1 2010 compared with Q4 2009)

Source: Statistiska Centralbyrån (Statistics Sweden)

Objectives

Providing the Swedish market with reliable circulation figures by auditing and publication of circulation figures as well as gather advertising rate cards and other information needed in the process of buying ads.

Allocation of Board Members

The external members of the board of TS are 3 members from the advertisers, 1 member from Advertising Agencies and 1 member from The Swedish Association of Magazines.

Status and Growth of Print Media as Compared to Other Media

Dailies	7012MSEK	-20,0%
Free Papers	2275MSEK	-12,7%
B2C magazines	686MSEK	-23,6%
B2B magazines	1160MSEK	-29,8%
Inserts	441MSEK	-10,5%
Directories	1564MSEK	-17,3%
Direct marketing	3948MSEK	-8,0%
Print media	17086MSEK	-17,0%
TV	4387MSEK	-11,7%
Text TV	19MSEK	-24,9%
Radio	639MSEK	-12,2%
Cinema	102MSEK	-1,4%
Internet	4993MSEK	2,5%
Mobile Marketing	50MSEK	33,0%
Out of home	954MSEK	-10,1%
Retail Media	69MSEK	-5,4%
Other media	11213MSEK	-5,5%
TOTAL MEDIA INVESTMENT	45385MSEK	-12,7%

Number of Customers

Dailies	186
Magazines	439
DM-mediums free of charge	392
Digital	52
TOTAL	1070

Customers buying media information are advertising agencies, advertisers, papers, magazines, schools, libraries and other).

Finances

TS income is derived from the following:

Publishers	65%
Advertisers and Ad agencies/media specialists	30%
Others	5%

Services Provided

Print audits, website audits, auditing of e-mails, auditing of SEO companies (both figures and customers policy. We also provide all information needed when buying and selling ads through our web portal.

Auditing

The audit is executed by TS staff auditors.

Print Circulation Reports

All print titles are audited at least once a year. Extra periods can be publish after an audit demanded by the publisher. All figures are published on our web.

Digital Audits

Every week we publish audited figures from the website audit. Quarterly we publish figures from auditing of e-mails. All figures are published on our web.

Other Audit Services

We audit e.g. the geographical distribution of all newspapers circulation.

Major Changes to By-Laws, Rules

Only small adjustments in our By-laws have taken place

Circulation terms

Dailies, Magazines and Business Publications/ Trade Journals Subscription Copies

Subscription copies are paid for at the normal price (fully paid) or at a price reduced by a maximum of 50 per cent (discount copies), with a maximum subscription period of 6 months (dailies), 50 per cent discount on bulk sales, otherwise the discount is 25 per cent maximum (dailies). The subscription period must be at least one month (minimum of two issues).

Single Copies

Single copies sold at a price announced on the publication (fully Paid) or at a reduced price of 50 per cent (discount copies) and subscription copies with a shorter period than one month.

Free Copies Included in Circulation

Free copies included in circulation must be distributed to the same recipients at least during three months and not less than three issues. Subscription copies at a price reduced by more than 50 per cent are included as free copies but specified as requested. Free copies are not allowed to be of a higher share than 5 per cent of the paid circulation (dailies). Magazines have no such limit of the part of free papers.

Association Copies

Copies regularly distributed to members of an organization/ association of which the publication is the official organ.

Circulation

The circulation is the sum of:

- Subscription copies.
- Single copies.
- Free copies.
- Association copies (trade journals only).

Publicity

We host seminars 7-8 times a year; we also have a big party when the annual figures are released. We advertise in both print and digital media.

Plans and Opportunities for the Future

- To increase the number of audited print media as well as on-line media.
- To improve existing and implement more time saving web services for our clients

(WEMF) AG für Werbemedienforschung

Contacts

Bachmattstrasse 53, 8048 Zurich

T +41 43 311 76 76

F +41 43 311 76 77

W www.wemf.ch

Established

ABC Switzerland was established in 1925 and run by SWISS ADVERTISING. Since 1971, the business is run by WEMF/REMP, AG für Werbemedienforschung, Zurich.

Member Since

1963 (Founding Member as Swiss Advertising)

Staff

Board	3
ABC	4
Readership survey	6
Marketing + Sales	4
Statistics	2
Rest	4
TOTAL	23
<i>(FTE: 17)</i>	

Chairman

Jürg Weber, Neue Luzerner Zeitung AG

Executive Director

Marco Bernasconi

Managing Director ABC

Roland Achermann

Membership

The Swiss ABC has no members as such; publishers are treated as clients.

Economic Situation

The financial crisis has hit hard Switzerland also.

But Switzerland had a stable economic situation.

The unemployment rate 4.3% in 2009, in May 2010 3.8%.

The situation for publishers is very difficult. The income from advertising over all medias go down 11.4%.

Divided in:

Print	-20.4%
TV	-5.1%
Radio	+2.9%
Cinema	-13.3%
Internet	(Estimate) +19.3%
Outdoor	-12.1%
Direct mail	-1.4%
Exhibition	-9.0%
Rest	+0.9%

Status and Growth of Print Media as Compared to Other Media

Total Advertising in Mio CHF

MEDIA	2008	%	2009	%	CHANGE	%
Print	2,406	41.5	1,915	37.3	-491	-20.4
Newspaper	1,676		1,309		-367	
▪ Public Magazines	308		240		-68	
▪ Special Interest	295		261		-34	
▪ Business Magazines	127		106		-21	
TV	628	10.8	595	11.6	-33	-5.1
Radio	131	2.3	135	2.6	4	2.9
Cinema	30	0.5	26	0.5	-4	-13.3
Outdoor	684	11.8	602	11.7	-82	-12.1
Exhibition	422	7.3	384	7.5	-38	-9.0
Direct mail	1,269	21.9	1,251	24.4	-18	-1.4
Others	226	3.9	226	4.4	0	0.0
TOTAL	5,796	100.0	5,134	100.0	-662	-11.4
Internet (Estimate)	300		358		58	19.3

Number of Titles

MEDIA	BUREAU AUDITED	TOTAL PUBLISHED	AUDIT IN %
Newspaper	<i>Total audited circulation ABC's (Total Average): 10.794 Mio</i>		
▪ Weeklies	238	345	69
▪ Sundays	17	17	100
▪ Daily News	142	167	85
Magazines	<i>Total audited circulation ABC's (Total Average): 25.431 Mio</i>		
▪ Consumer	48	73	66
▪ Special Interest	221	301	73
▪ Business	242	294	75
Others	827	1,665	50
<i>Total audited circulation ABC's (Total Average): 11.347 Mio</i>			
TOTAL	1,736	2,862	61
<i>Total audited circulation ABC's (Total Average): 47.572 Mio</i>			

Policy Guidance

- Board of Directors, consisting of 5 members.
- Executive Committee of ABC Switzerland, (Kommission für Auflage und Verbreitung, KAV), consisting of 12 members:
 - 4 members and chairman from the Swiss Newspapers and Periodical Publishers Association (VSP, Presse Suisse, Stampa Svizzera).
 - 2 members from Association of Swiss Advertisers (SWA).
 - 2 members from Association of Swiss Advertising Agencies (BSW).
 - 2 members from Association of Swiss Advertising Practitioners and Agencies (VSW).
 - 2 members from Swiss Advertising Association.

The Executive Committee meets twice a year to deal with matters of audit procedures, or on request.

Finances

Publishers – Dues & Services

Circulation Reports

Certificates of Audit are issued to the publisher with a validity of one year.

Since 1980, the WEMF publishes a printed report of audited figures. Publication date is in November each year.

Auditing

Audits are being executed according to "Circulation Regulations in Switzerland" (Reglement WEMF/SW-Auflagebeglaubigung).

The rules were established by the Executive Committee in 1952 and were revised in 1977, 1988, 1990, 1994, 1998 and 1999, 2004, 2006, 2009.

Audit procedures:

- The publisher fills in a form to declare the circulation achieved during the last year, giving details per month and circulation categories (circulation statement).
- After 1st October, these circulation figures are allowed to be widely published.
- WEMF/REMP publishes an official written report, issued at the beginning of November following the year of reference (in 2009, figures for 2008 are being published).

Audits are performed at the publisher's office every year.

Since 2006 the fiduciary companies PriceWaterhouseCoopers and Ernst & Young are auditing parts of the Daily News, Sundays and Weeklies. There are about 250 titles. The other about 1486 titles are audited by the specialized staff of the bureau.

The publisher is committed to pay CHF 50,000—in case he declares intentionally the wrong circulation figures.

Specific

Since January 1, 2000, the Swiss Postal Office requires an audit for all titles who want to profit from special reduced rates.

Circulation Terms

Paid Circulation (Verkaufte Auflage)

- Subscriptions sold at a reduced price are considered fully paid if discount does not exceed 50%. If discount is higher than 50%, it will be separately mentioned and also published.
- Net circulation figures include free copies regularly sent to the same address. The latter does not exceed 5% of paid copies.
- Single copies are sold to the public, through retail outlets or in bulk for distribution at conventions, etc.

Free Circulation (Gratisauflage)

- Copies exceeding the above-mentioned fixed allowance of free copies.
- Copies are sent out free-of-charge. Verification of distribution of free copies is required.
- Not included, and not considered audited circulation, are: unsold copies (returns), bound volumes, special and extra issues, spoiled copies, file and checking copies.

Other Services

- Distribution analysis of newspapers and free papers (every year, connected with ABC).
- National Readership Survey (MACH Basic), twice every year.
- General Analysis of Consumer (MACH Consumer), every 2 years.
- Analysis of Consumer of Leaders (MA Leader), every 2 years.
- General Analysis of print, radio, TV and internet (MA Strategy), twice every year.
- General Analysis of psychography (MACH Radar), twice every year.

The Audit Bureau of Circulations, Chinese Taipei

Established
October 10, 1994

Member Since
November 2008

Staff
2

Chairman
Wen-Li Yeh (Aegis Media Greater China-Chairmen)
Executive Director/CEO
Rosa Yang Yu

Membership

ADVERTISERS/MARKETERS	6
1 Uni-President Enterprises Corp.	
2 Sinyi Realty Inc.	
3 Elca Inc., Taiwan	
4 Chanel Inc.	
5 Mercedes-Benz Taiwan Ltd.	
6 President Chain Store Corp.	
AD AGENCIES/MEDIA AGENCIES	4
1 Group M Limited Taiwan Branch	
2 Carat Media Taiwan Ltd.	
3 Vizeum Taiwan Private Limited, Taiwan Branch	
4 CS Innovations Marketing Group Co., Ltd.	
PUBLISHERS	5
1 Commonwealth magazine Group	
2 Next Media Publishing Limited, Taiwan Branch	
3 Home Media Group Limited Cite Branch	
4 Ever beauty publications, inc.	
5 Liberty Times Ltd.	
TOTAL	17

Group Members

- 1 Taiwan Advertisers Association
- 2 Media Agencies Association

Personnel Changes

Re-election the Board of Directors of ABC-Taipei

Objectives

Base on fair, objective, openness principles, and through newspaper and magazine publications surveys, audit and analysis on the paying readers to supply correct information, promote reasonable advertisement and control to achieve the objectives of honesty and reliability, and as an unbiased measure for the society.

Economic Situation Relevant to Marketing and Publishing Activities

Economic situation has been struggling with recession since financial meltdown of 2008. Publishing industries and Ad/Media Agencies have been through a challenging time ever since. However, we have faith in business getting better in the second half of 2010.

Status and Growth of Print Media as Compared to Other Media

Print Media (Newspaper & Magazine) has been declined 16.18% while TV and Radio declined less than 4% in 2009 v.s. 2008.

Finances (Revenue Profile)

NTD Three million and two hundred eighty thousand only. (2009)

Services Provided

The operation range of ABC is as follows:

- 1 Investigation and audit on the circulations of newspapers and magazines;
- 2 The study and analysis of the paid readers of newspapers and magazines;
- 3 The study and research of the related legal issues;
- 4 Issue publications;
- 5 Exchange and association with the related domestic and foreign organizations;
- 6 Subsidize the educational institutions on the research of media related issues;
- 7 Other issues and matters related to the founding principles.

Print Circulation Reports

Released by every 6 months (the 4 reports type as attachment 1-4)

Special Issues/Challenges

Most Print Media don't appreciate the value of audited circulation while only leading print media (mean print media which is number one in terms of circulation) can accept ABC. Moreover, media agencies and advertisers don't view Audited print media is a basic practice in the usage of print media.

In short, we are facing a tardy stage to another growth in membership expansion.

Publicity

Evaluate the development of Digital Publications audited and Events/Exhibitions audited.

Interesting Developments within the Bureau

Events audits, Web site audit

Other relevant activities

To do a market research and survey.

Plans and Opportunities for the Future

- A plan of collect contribution or donations.
- To hold seminar or workshop.

ABC

Established

1931

Member Since

1963 (Founding Member)

Staff

107

Chairman

Sally Cartwright

Executive Director/CEO

Jerry Wright

Membership

Regional Publications	937
Business Magazines	643
Consumer Magazines	627
Exhibitions (trade & consumer)	112
National Newspapers	28
Group Certificates	179
Bulk publications	14
Digital & online properties	481
Agencies/Advertisers/Others	173

TOTAL NUMBER OF TITLES IN MEMBERSHIP	3194
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Personnel Changes

- Jerry Wright replaced Chris Boyd as Chief Executive in September 2008.
- Sally Cartwright replaced John Mayhead as Chairman in February 2010.
- Simon Redlich was promoted to Director of Finance and Audit in November 2009.

Objectives

Company vision: Inspiring market confidence by delivering a valued stamp of trust across the media world.

- Minimize revenue loss from print membership.
- Grow audit fee income, looking to gain new mandates and grow share.
- Build new business in digital, for both traffic data and new process audits.

Economic Situation Relevant to Marketing and Publishing Activities

Total UK media expenditure declined 4.2% yoy in 2008 and fared considerably worse in 2009. The downturn in advertising came as the country moved into recession and advertisers started cutting their budgets. The latest reports however, indicate that total marketing budgets are being revised modestly upwards in Q1 2010, thus ending a period of decline over the past 2½ years.

(Source: WARC/IPA Bellwether)

Status and Growth of Print Media as Compared to Other Media

Circulations continue to decline across most sectors with the last national newspaper data indicating a 4-5% reduction yoy and consumer magazines down approximately 1%. The trends show a steeper decline in both Regional Newspapers and Business Magazines

In terms of advertising expenditure, the internet remains by far the strongest growing medium achieving a 19% market share. Television and radio showed ad spend declines of -4.9% and -8.5% respectively according to the latest (2008) figures. The only other sector showing growth, other than online, was cinema at +1%. Print media as a whole accounted for 37.6% of total market ad spend, but all sections within this, including regional and national newspapers, business and consumer magazines experienced declines yoy. Regional newspapers showed the largest drop at -15.8%. Press classified advertising has been hit hardest by the recession, partly due to weak recruitment and property markets but also as a result of the continuing migration of budgets online.

In summary, the overall market landscape remains difficult and challenging, with no sustained rebound foreseen, though there has been an increase in ad spends in the first half of 2010. Title closures and resignations will continue to outweigh the effects of new launches in the next year.

—

(Source: WARC)

Affiliation

- IPA/IPA digital (media agencies)
- ISBA (advertisers)
- NPA (national newspapers)
- NS (regional newspapers)
- AOP (online publishers)
- IAB (internet advertising)
- PPA (magazines)
- FIPP (international magazines)
- AAI (advertisers in Ireland)
- IAPI (media agencies in Ireland)
- NNI (national newspapers in Ireland)
- Magazines Ireland (magazines in Ireland)
- RNPA (regional newspapers in Ireland)

Finances (Revenue Profile)

Membership	32%
Audit	61%
Other	7%
Total turnover in 09/10 year	£6.0M

Services Provided

- ABC provides detailed print circulation and distribution, exhibition attendance, web traffic and digital media measurement across a broad range of platforms.
- ABC also works with a number of industry organizations in digital to provide process audits. These verify that industry best practice is being adhered to.

- Audit, consultancy and training services are provided across all platforms.
- ABC delivers sector reports to the UK and Irish markets, as well as providing data sales to media data aggregators and financial institutions.
- ABC also facilitates the development of the Reporting Standards via the co-ordination of the Reporting Standards Groups in print and JICWEBS in digital. Reporting Standards are the industry-agreed rules by which ABC data is prepared and reported.

Print Circulation Reports

- National newspapers (print and online)—monthly;
- Regional newspapers (print and online)—six monthly;
- Consumer magazine—six monthly;
- Bulk publications—monthly;
- Irish media—six monthly

Digital Audits

- Web (census based traffic and related activity eg engagement)
- Mobile (including WAP, SMS, Bluetooth)
- Video (including digital TV)
- Digital publications
- Downloads and podcasts
- Email
- Online advertising
- Databases
- Ad servers
- Ad networks
- Search
- Online resource usage (including journals, articles and academic documents)

Web audits are conducted during an audit month or six monthly period chosen by the media owner. The frequency of digital audits is determined by the media owner.

Other Audit Services

Digital process audits to industry standards provided for:

- IASH – Internet Advertising Sales Houses
- OBA – Online Behavioural Advertising
- GSMa – Verification of mobile traffic data via ComScore

Major Changes to By-Laws, Rules

Multipacks (Consumer Magazines)

Magazines sold as part of a retail multipack are now shown on an ABC certificate as a percentage of the total newstrade and single copy sales, alongside the name(s) of the other publications included in the pack. The new rules prohibit the claiming of back issues sold as part of a multipack, as well as ensuring the multipack must be at least the price of the highest priced publication plus 20% of the cover price of the other magazine(s) included in the pack.

Issue by issue data (Magazines)

ABC now publishes a bi-annual monthly/issue-by-issue report for consumer magazines. The report details month-on-month or issue-by-issue figures by title and publisher. This followed demand from the industry for more transparency when reporting consumer magazine figures. Over 200 titles feature in this voluntary report and, for some titles, the monthly/issue by issue data is also published on ABC certificates.

Free pick up copies (Regional Publications & ABC Bulk)

Non-daily titles generally must report a capped distribution and daily a net distribution. Copies distributed to airports must be on a capped basis.

Change of mandatory metric name and frequency (Online traffic)

In order to emphasize that the Unique User/Browser metric is aimed at counting devices (not people) the name has been simplified to Unique Browser. Also the ABCe certificate has been redesigned to place more focus on daily, rather than monthly, figures.

Separate Irish (ROI) Reporting standards

5 separate rulebooks for ROI publications have been established including – ROI Business Magazines, ROI Consumer Magazines, ROI Paid Newspapers, ROI Free Letterbox Delivery and ROI ABC Bulk Distribution.

Special Issues/Challenges

- There is continued accelerated decline in print circulation.
- Shrinking ad revenue is resulting in title closures and less membership revenue.
- The shift from print to digital is further reducing media owner revenues, as they struggle to monetize online content.
- The speed of change in digital requires constantly evolving metrics and audit techniques.
- The proliferation of measurement methods/analytics in digital makes it hard for one to become a 'currency' and achieve critical mass as media owner strategies diverge.
- UKOM (UK Online Measurement) recently launched by the AOP/IAB, a panel-based system, is trying to position itself as the online measurement currency.
- There is a lack of awareness and understanding in agencies of digital measurement methodologies.

Publicity

ABC has tight publicity rules in place to ensure that reported figures are compared by competing publishers on a like for like basis. Anyone who breaches these rules can be formally complained about to ABC or ABC can itself bring a complaint against an offending publisher.

ABC provides a series of press and online advertisements which the publishers can adapt and use in their titles in order to promote their membership.

ABC have also recently introduced a 'Be wise when you advertise' email campaign. This is automatically generated when a new certificate is issued and allows a publisher to send an email to all their advertisers, highlighting that title's ABC circulation and promoting the benefits of advertising in an audited title.

Interesting Developments within the Bureau

In February 2010 ABC announced a new governance structure, replacing the ABC Council with a new ABC board. The new structure streamlined 32 industry representatives down to 16, including, for the first time, a 25% share for digital media representation. The move enabled Reporting Standard Groups to ratify rule changes for their sector (unless a board member objects to the rule within 30 days) and gave authority for developing Irish media rule sets to a newly formed ABC Irish (ROI) Council, though still under ABC UK's aegis.

In order to better understand and satisfy the needs of agencies an Agency Relationship Management (ARM) programme has been established. This scheme allocates a focused contact to be responsible for bespoke communication of services and training for a named top 10 agency, whilst collecting feedback on what their specific needs are.

Plans and Opportunities for the Future

An area of great interest for the future is digitally-distributed products/apps/iPads, particularly for magazines. Development of metrics (across all media, but especially digital) is continually evolving in line with industry demand, especially with the focus on engagement and paid-for content on-line.

Audit Bureau of Circulations –United States and Canada

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W www.accessabc.com
With offices in: New York City; Toronto, Canada

Established

May 1914

Number of Employed Staff

200 (full-time)

Chairman

Merle Davidson
Market Media Director, Strategic Marketing / Media Services
Executive Director/CEO
Michael Lavery

Composition of Board of Directors

Advertisers and Agencies	19
Newspapers	8
Magazines	6
Business and Farm publications	3
TOTAL	36

Source of Board Chair

Only from advertiser or agency director constituencies

Fiscal Year

September 1 – August 31

Primary Markets served

United States and Canada with some audits in Mexico, UK, Europe and Asia/Pacific region

Membership

Advertisers and Advertising Agencies	1,450
Print titles	1,900
Digital	230
TOTAL	3,580

Objectives

The objects of the Audit Bureau of Circulations are "to provide verification and information services for the benefit of advertisers and the media they use."

In this connection, ABC issues standardized statements of circulation data or other data reported by a member; verifies the figures shown in these statements through auditors' examination of any and all records considered by the Bureau as necessary; and disseminates these data for the benefit of advertiser members, advertising agency members and other members interested in facts on the advertising and publishing industry. Facts, without opinion, to be reported.

Affiliation

No formal or corporate affiliations with media trade bodies. That is, in an effort to maintain its independent from an audit perspective, ABC has no formal organizational affiliations with any of the various trade associations representing publishers or advertisers. Nor do representatives from these associations serve on the ABC Board of Directors. Of course, ABC liaises and communicates with these organizations on working groups or advisory committees (i.e. Internet Ad Bureau audit and measurement committee).

Finances (Revenue Profile)

Audit and information services	91%
Dues	5%
Other income	4%

Services Provided

- Circulation audits - paid and non-paid
- Report and data information services
- Advertiser coupon and pre-printed advertising circular audits and process verification services
- Web traffic audits
- Internet service provider attestations
- Newspaper readership and audience survey audits
- Magazine subscriber profile survey audits
- Tradeshow and convention audits (included in business publication consolidated media reports)
- Sunday newspaper magazine supplement audits (i.e. Parade Magazine)

Print Circulation Reports

- Primary sectors: Consumer magazines; Business publications; Farm publications; Newspapers; Newspaper total-market-coverage publications
 - Paid and non-paid publications within each category
 - Readership and audience reports (optional)
 - Advertising pre-print inserts audits (optional)
- Publishers Statements
 - Semi-annual statements of circulation claims by publishers
- Circulation audit reports
- Consolidated media reports (optional)
- Statement Plus – user defined supplemental report to amplify circulation data included in Publisher's Statement (optional)

Digital Audits

Web traffic audits – Frequency: Monthly; quarterly; semi-annually per site preference. Audits include served based and panel based sources. Web activity metrics include (among others): Unique users; Page impressions and Ad impressions. Web service provider attestations confirm (among other things) internal controls governing internal and external reporting; reliability of these reports; compliance with industry established definitions, etc.

Major Changes to By-Laws or Rules

While there are ongoing modifications to rules and reporting formats, the most significant of these changes since the ABC's last bureau report apply to US newspapers. (Rule and report format changes described herein do not apply to ABC's Canadian newspaper membership given the differences in marketplace media buying and selling dynamics. Canadian newspaper rules are considered independently from US newspaper rules.) The most significant of these changes is the creation of a new category of circulation for US newspaper entitled "verified" circulation.

Beginning in early 2009 and transitioning through much of 2010 US newspapers will largely report their circulations in three circulation and distribution categories: Individually paid; "verified" circulation and non-paid distribution. The newly created verified circulation category captures the bulk of circulation that is purchased or provided by third parties (i.e. sponsors) distributed to designated recipients such as households, schools and newspaper employees.

The rule and reporting changes do not impact the business relationship between newspapers and sponsors purchasing copies for distribution to designated recipients. Rather, copies sold to third parties for subsequent distribution to designated recipients or provide to employees of the newspaper by the publication itself will be classed in the verified circulation category.

The audit of the circulation involved in the verified channel will continue to confirm distribution to designated recipients.

The result of the creation of the new verified circulation category and the reclassification of copies purchased or provided by third parties into this category redefines paid circulation to newspapers primarily purchased by individuals and businesses for their employees.

Given the comprehensive nature of this and other changes to US newspaper rules and reporting formats there will be a phased implementation schedule beginning in early 2009 and being completed in the fall of 2010.

US newspapers saw another significant change as regards their reporting format. That is, in an effort to present a comprehensive overview of all of a newspaper's key media metrics, ABC offers its newspaper members the option to report audited print and on-line readership as well as total unduplicated audience statistics. These data are supplemented by the publication's total web activity data as sourced from either panel-based researchers or server based log files. The brand for this optional service is entitled Audience-FAX.

And, while many of the items noted above are still in a process of transitional implementation, the inclusion of digital editions with print distribution (and in some cases in lieu of print editions) are driving new rules to qualify the circulations of traditional print publications (especially as "paid" circulation).

Finally, reflecting the needs and differences in the Canadian marketplace versus the US, the Bureau established separate rules for each of ABC's Canadian media divisions with oversight for same vested in a Canadian Board which is organized and staffed in a similar manner as is ABC's Board of Directors.

Issues and Challenges

While there are universal issues involving energy prices, a soft economy and the fragmentation of media and advertising that impact the publishing and advertising marketplaces, other more specific issues include:

- 1 With the extension of publisher brands into new and other branded print media there is a challenge of reporting a publisher's total media footprint. This is especially problematic given dissimilar media metrics and the fluid nature of definitions involving web activity.
- 2 Developing relevant audit and information reporting services for the rapidly changing Internet content and service providers.
- 3 As noted above, the qualification and reporting of hybrid (print and digital) subscriptions as well as bundled (multi electronic based plus print) subscriptions.

Publicity

For the most part, ABC's publicity rules are based on the following tenants: ABC authority can be claimed provided

- 1 Comparisons are of like data, for like periods, from like reports;
- 2 Data should be presented in a fashion to give the reader the same sense or interpretation as though the report(s) quoted were before him/her;
- 3 Where members calculate or otherwise derive or analyze data, the source of the analysis must be note as publisher's own analysis/calculation.

Interesting Developments within the Bureau

ABC moved its headquarters offices from Schaumburg, Illinois to a nearby suburb – Arlington Heights, Illinois in March 2010.

BPA Worldwide

Established

October 15, 1931
 Canadian Circulations Audit Board (CCAB)
 merged with BPA - January 1, 1998.

Member Since

1964 (Founding Member).

Staff

127

Chairman

Gaye Sussman, President, ID Media

Executive Director/CEO

Glenn J. Hansen

Economic Situation Relevant to Marketing and Publishing Activities

2008 and 2009 were depressed advertising years with many print media going out of business.

Status and Growth of Print Media as Compared to Other Media

Presently at a stand still although it has been in decline for two years. Print memberships have declined while the number of web sites measured has grown to over 600.

Objectives

BPA Worldwide is the global industry resource for verified audience data and media knowledge. BPA delivers consumer and business media audits of unsurpassed rigor, objectivity, accuracy, transparency and timeliness—audits that provide solid assurance for both media owners and media buyers. With rich, in-depth information, BPA audits also provide advertisers, agencies and media owners with audience insights that they can turn into competitive advantage. For media buyers and owners all over the world, BPA helps turn assurance and insight into advantage.

Membership

Business Publications	1550
Consumer Magazines	375
Newspapers	150
Websites, Events, Email Newsletters, Databases Wireless and other Supported Media	600+
Advertiser and Agency Members	2700+

Personnel Changes

We experienced a reduction in work force due to the economic condition and the transition to measurement of online which requires fewer staff than print measurement.

Finances (Revenue Profile)

US\$15 million in revenue. We continue to operate profitably.

Services Provided

- Ad Serving Systems
- Business Publications
- Consumer Magazines
- Databases
- Email Newsletters
- Events/Exhibitions
- Integrated Brand Reachsm audits
- Newspapers
- Web Sites
- Wireless Media

Bpaww.com provides access to the circulation, traffic and attendance reports for more than 2,100 media properties. In addition to the current reports, the online library contains a five-year history for trend analysis purposes. The site also contains links to media properties, industry associations, and suppliers to the marketplace.

Print Circulation Reports

- Magazines:** Two semi-annual circulation statements for periods ending June 30th and December 31st. Audit reports are issued when requested by the media owner or required by BPA due to changes made as a result of the annual audit. The semi-annual BPA TRAC (Trend Report About Circulation) presents summary data from all circulation statements grouped by their primary market.
- Newspapers:** Canada Dailies: One annual audit based on calendar year.
- Canada Community/Weekly:** Two semi-annual circulation statements for periods ending March 31st and September 30th.
- EMEA:** Two semi-annual circulation statements for periods ending June 30th and December 31st.

Audit reports are issued when requested by the media owner or required by BPA due to changes made as a result of the annual audit.

Digital Audits

BPA's definition:

- Digital Magazine:** A magazine (either with a companion print version or as a stand alone digital product) delivered periodically in a digital format with metered (i.e. linear) navigation that is edited, designed, and contains date-stamped content that includes advertising (but not necessarily the same advertising as might appear in a print version). Though editing, design, and issue identification (i.e. date-stamped content) are significant differences, the primary distinction between a digital magazine and a website is the metering (this can be pagination or any other method of going through the issue from beginning to end). A digital magazine may be dynamically created, have targeted content, or may exist in parallel with pre-existing media.
- Dynamic:** Editorial can be created and/or selected at point of delivery. With a dynamic digital magazine, each recipient can receive a copy with different content and that content can change at any time.
- Targeted:** Editorial is changed for specifically defined groups and/or platforms before point of delivery. With a targeted digital magazine, each group of recipients, whether they are segmented demographically or because of the platform they use to receive

the digital product, receive a copy with different content specifically selected for that group. Apart from minor updates, the content cannot change once the issue is made available.

- **Enhanced:** If a print brand existed first, “enhanced” is editorial that is retained from the original edition and is redesigned and/or supplemented. With an enhanced digital product, each issue’s content is primarily taken (but not necessarily replicated in its entirety) from the original edition (whether in print or digital). Apart from minor updates, the content cannot change once the issue is made available.
- **Replic:** If a print brand existed first, editorial and design are unchanged from the original print edition. With a replica digital product, each issue’s content and design are identical to the original edition. Apart from minor updates, the content cannot change once the issue is made available.

Effective June 2010: Publishers shall disclose in circulation statements under a “Statement of Content Platform” the form or combination of forms of digital magazine used per the above definition/ description.

Circulation for digital magazines shall be audited to ensure that the systems of the media owner companies and their vendors are in compliance with BPA Worldwide rules and policies before such data can appear on a circulation statement. A special audit may be undertaken to verify the digital distribution.

The printing and release of an audit report shall be at the media owner’s option. In all audit reports and circulation statements, digital magazines circulation shall be detailed separately throughout the report. Individuals receiving both the print and digital magazine shall be included only once within Paragraphs 1, 2, 3a, 3b, 3c, 4, and 7.

Whenever a circulation claim is made which is comprised of both print and digital copies, such shall be disclosed in the promotion piece. Print Edition and Digital Edition circulation figures may be reported separately, or may be combined, with a footnote disclosing print copies and digital copies.

Individuals receiving copies of a digital version may only be considered as qualified circulation if such copies are elicited either through personal or company request, or a non-deductible benefit-of- membership subscription. Publishers may convert “requested” print edition subscriptions to digital magazine subscriptions, provided the subscriber who requested the publication receives advance notice of the conversion and is given the option to refuse the conversion. The notice of conversion must give the publisher enough time to stop the conversion if the subscriber refuses to convert to a digital subscription. Evidence of the original request and the notice of the conversion shall be available at the time of audit.

Other Audit Services

- **Event/Exposition Audit:** Reports on overall attendance, attendee demographics, registration procedures, criteria, exhibit space and fees.
- **Email Newsletter Audit:** Provides summary of the distribution of an email newsletter, including average net circulation, qualified circulation by individual issues and demographic analysis of registered circulation.
- **Supplemental Audit:** Provides demographic information about qualified recipients, such as a) the number of buying influences; b) products purchased; c) additional job functions; d) firm’s secondary or multiple industry activities; and e) the types of equipment installed.
- **Unit Audit:** Identifies the number of plants, establishments, or other clearly defined business facilities reached by publications and details the number of copies directed to each. Units are broken down by state or other geographic areas, and by one or more of the following: a) type of business; b) product manufactured; c) volume of sales/purchases; and d) number of employees.

- **Network Report:** Reports consolidated circulations of several publications and identifies the total circulation reach for all publications combined.
- **Duplication Audit:** Reports overlapping circulation between two or more publications and demonstrates what the unduplicated circulation is in all publications.
- **Electronic Filing:** Increases the quality control of circulation data and expedites the auditing and reporting process.
- **Circulation Mapping:** Portrays business, occupation and geographic information on recipients through the use of charts, graphs and maps.
- **BusinessTRAC and ConsumerTRAC:** Provides top line information on the circulations of publications uniformly reported and listed by industry category. Both trend reports are semi-annual and contain up-to-date circulation information on hundreds of business publications and consumer magazines.
- **Census Audit:** Contains an analysis of the number of plants and establishments covered by a publication or firm in a defined area and includes data on one or more of the following type of business, size, volume, and/or number of employees.
- **Pass-Along Receivership Study:** Subscribers often pass along copies of a media to colleagues at work. The pass-along receivership audit report contains an analysis of those people, identified and is conducted in conjunction with a publication’s regular circulation audit.
- **Multi-Language Audit:** BPA Worldwide provides translations of circulation statements and audit reports to its members.
- **BPA Interactive:** BPA Interactive was launched in early 1996 to provide accurate, independent, third-party verification of Web site traffic. Amongst the products we offer are audits for:

- General traffic
- Aggregate ad activity
- Specific ad campaigns
- Demographics of registered users
- Ad Serving System certification

BPA Integrated Brand Reach Audit enables media owners to provide media buyers with a report that shows the entire reach of their brand in the marketplace—print, online and face-to-face—all channels of the brand.

Major Changes to By-Laws, Rules

www.bpaww.com/Bpaww_com/Pages/Rules.aspx

Special Issues/Challenges

Shift of ad spend away from print.

Publicity

BPA has a clear set of publicity guidelines which members agree to follow. Members are encouraged to submit promotional materials to BPA for review to ensure compliance of those guidelines. Visit BPAWW.com for our rules (see link above) See specific section of rules on publicity.

BPA promotes itself through display advertising, both in print and on-line. We also engage in direct marketing programs and sponsorships of events.

Interesting Developments within the Bureau

Continued growth in members in new countries. Most recent additions include Lebanon, Libya, South Africa and Tanzania.

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